

**МІНІСТЕРСТВО ОСВІТИ І НАУКИ УКРАЇНИ
КИЇВСЬКИЙ НАЦІОНАЛЬНИЙ УНІВЕРСИТЕТ
ТЕХНОЛОГІЙ ТА ДИЗАЙНУ**

МЕНЕДЖМЕНТ

№ 2 (38), 2023

DOI: 10.30857/2415-3206.2023.2

Наукове видання

Періодичність виходу журналу: 2 рази на рік

Київ 2023

Журнал «Менеджмент» є науковим виданням Київського національного університету технологій та дизайну як правонаступника Державного вищого навчального закладу «Міжгалузева академія управління» (наказ Міністерства освіти і науки України від 19.06.2015 р. №661 «Про реорганізацію державного вищого навчального закладу «Міжгалузева академія управління»)

№ 2 (38) 2023	Свідоцтво про державну реєстрацію друкованого засобу масової інформації: серія KB №22130–12030 ПР від 16.05.2016 р. Свідоцтво суб'єкта видавничої справи: ДК № 993 від 24.07.2002 р.
	Журнал входить до переліку наукових фахових видань. Наказ МОН України від 18.12.2018 № 1412 (додаток 10, рішення щодо присвоєння Категорії Б) – фаховість із економічних наук. Спеціальності: 051, 071, 072, 073, 075, 076, 241, 281.
ISSN 2415-3206	Журнал зареєстровано в Міжнародному центрі періодичних видань (ISSN International Centre, Париж, Франція) 24.03.2016 р. Журнал реферується та індексується у наступних міжнародних базах даних: International DOI Foundation, CrossRef, WorldCat, Google Scholar, Національна бібліотека України імені В.І. Вернадського, Інституційний репозитарій Київського національного університету технологій та дизайну
Правонаступник і видавець:	Київський національний університет технологій та дизайну Україна, 01011, м. Київ, вул. Мала Шияновська, 2
Головний редактор:	Грищенко І.М. , доктор економічних наук, професор, академік Національної академії педагогічних наук України, Заслужений працівник освіти України, лауреат Державної премії України в галузі науки та техніки
Заступник головного редактора:	Ганущак-Єфіменко Л.М. , д.е.н., професор, проректор з наукової та інноваційної діяльності, лауреат Національної премії України імені Бориса Патона

Тематична спрямованість журналу «Менеджмент»: економіка, менеджмент соціокультурної діяльності; облік і оподаткування, фінанси, банківська справа та страхування, менеджмент, публічне управління та адміністрування, маркетинг, підприємництво, торгівля та біржова діяльність.

Видання орієнтоване на науковців, викладачів, аспірантів, студентів, а також науково-практичних працівників і фахівців відповідних галузей промисловості.

Кривонос Олена Олександрівна – відповідальний секретар.

АДРЕСА РЕДАКЦІЇ:

01011, м. Київ, вул. Мала Шияновська, 2, корп. 1, к. 347

тел./факс: +38 (044) 256-21-39

e-mail: management_knutd@knutd.edu.ua

офіційний сайт: <http://management.knutd.edu.ua>

Рекомендовано до друку Вченою радою Київського національного університету технологій та дизайну, протокол № 5 від 22.11.2023 р.

Матеріали друкуються змішаними мовами: англійською, польською. Відповідальність за переклад, достовірність фактів, цитат, власних імен, географічних назв, назв підприємств, організацій, установ та іншої інформації несуть автори статей. Передруки та переклади статей дозволяються лише за згодою автора (-ів) та редакції.

MINISTRY OF EDUCATION AND SCIENCE OF UKRAINE
KYIV NATIONAL UNIVERSITY
of TECHNOLOGIES and DESIGN

MANAGEMENT

Issue 2 (38), 2023

DOI: 10.30857/2415-3206.2023.2

Scientific publications

Issued: 2 times a year

Kyiv 2023

Journal "Management" is a scientific edition of Kyiv National University of Technologies and Design as a successor of State higher educational institution "Interbranch Management Academy" (order of Ministry of Education and Science of Ukraine from 06.19.2015 №661 «About reorganization of state higher educational institution" Interbranch Management Academy")

**Issue 2 (38)
2023**

**Certificate of print media registration: KV series №22130–12030 PR from 16.05.2016
License for publishing activity is DK №993, originating date 24.07.2002**

The journal is listed & reregistered in Higher Attestation Commission of Ukraine: № 1412, originating date 18.12.2018. Fields: economical. Specialties: 051, 071, 072, 073, 075, 076, 241, 281.

ISSN 2415-3206

The journal is registered in the International Center of periodicals (ISSN International Centre, Paris, France) 03.24.2016
The journal is abstracted and indexed by International DOI Foundation, CrossRef, WorldCat, Google Scholar, The Vernadsky National Library of Ukraine, Kyiv National University of Technologies and Design Institutional Repository

**Assignee and
publisher:**

**Kyiv National University of Technologies and Design
Ukraine, 01011, Kyiv, str. Mala Shyianovska, 2**

Editor in Chief:

Ivan M. Gryshchenko – Dr., professor, academician National Academy of Pedagogical Sciences Ukraine, Honored Worker of Education of Ukraine, Laureate of the State Prize of Ukraine in science and technology.

**Editor
deputy:**

Liudmyla M. Hanushchak-Yefimenko – Dr., professor, Laureate of the Prize of the Verkhovna Rada of Ukraine for young scientists, Laureate of the Boris Paton National Prize of Ukraine.

Journal "Management" focuses on: economics, management of social and cultural activities; accounting and taxation, finance, banking and insurance, management, public management and administration, marketing, business, trade and exchange activities.

The journal is aimed at a wide range of researchers, professors, students, and graduate students and to bring the results of scientific research carried out under a variety of intellectual traditions and organizations of procedures to the attention of a specialized readership.

Olena Kryvonos – secretary of the Editorial Board.

EDITORIAL ADDRESS:

01011, m. Kyiv, str. Mala Shyianovska, 2, Bldg. 1, cabinet 347

tel.: + 38044-256-21-39

e-mail: management_knutd@knutd.edu.ua

офіційний сайт: <http://menagement.knutd.edu.ua>

Recommended for publication by the Academic Council of Kyiv National University of Technologies and Design, protocol № 5 from 22.11.2023

Printed materials mixed languages: English, Polish. Responsibility for the translation, the accuracy of the facts, quotations, proper names, geographical names, names of companies, organizations, institutions, and other information are authors of articles. Reprints and translations of articles permitted only with the consent of the author (-s) and the publisher.

INFORMATION ABOUT EDITORIAL BOARD MEMBERS

Journal "Management"

Gryshchenko Ivan – Chief Editor, D.Sc. (Economics), Professor, Academician National Academy of Pedagogical Sciences Ukraine, Honored Worker of Education of Ukraine, Laureate of the State Prize of Ukraine in science and technology, Kyiv National University of Technologies and Design, Ukraine; ORCID 0000-0001-7572-4757.

Hanushchak-Yefimenko Liudmyla – Deputy Editor, D.Sc. (Economics), Professor, Laureate of the Prize of the Verkhovna Rada of Ukraine for young scientists, Laureate of the Boris Paton National Prize of Ukraine, Kyiv National University of Technologies and Design, Ukraine; ORCID 0000-0002-4458-2984.

Editorial Board Members

Kasych Alla – D.Sc. (Economics), Professor, Kyiv National University of Technologies and Design, Ukraine; ORCID 0000-0001-7019-1541.

Gnatenko Iryna – D.Sc. (Economics), Professor, Kyiv National University of Technologies and Design, Ukraine; ORCID 0000-0002-0254-2466.

Olshanska Oleksandra – D.Sc. (Economics), Professor, Kyiv National University of Technologies and Design, Ukraine; ORCID 0000-0003-1535-7742.

Oleshko Anna – D.Sc. (Economics), Professor, Kyiv National University of Technologies and Design, Ukraine; ORCID 0000-0001-9328-7730.

Shkoda Mariana – D.Sc. (Economics), Associate Professor, Kyiv National University of Technologies and Design, Ukraine; ORCID 0000-0002-7356-4320.

Lepeyko Tatiana – D.Sc. (Economics), Professor, Kyiv National University of Technologies and Design, Ukraine; ORCID 0000-0001-8667-509X.

Morhulets Oksana – D.Sc. (Economics), Professor, Kyiv National University of Technologies and Design, Ukraine; ORCID 0000-0001-6530-1478.

Radionova Nataliia – D.Sc. (Economics), Associate Professor, Kyiv National University of Technologies and Design, Ukraine; ORCID 0000-0002-8855-2963.

Tarasenko Iryna – D.Sc. (Economics), Professor, Kyiv National University of Technologies and Design, Ukraine; ORCID 0000-0003-3626-4377.

Vitkovskiy Yuri – D.Sc. (Economics), Professor, Kyiv National University of Technologies and Design, Ukraine; ORCID 0000-0001-5806-8671.

Grzegorz Ostasz – D.Sc., PhD, International Relations Rzeszow University of Technology, Poland; ORCID 0000-0002-1974-6393.

Liliya Pan – PhD, Professor, EuroMed Academy of Business, Edinburgh Business School, Heriot-Watt University, Edinburgh; ORCID 0000-0001-9915-7208.

Rafał Rębilas – PhD, Vice-Rector, Akademia WSB, Dąbrowa Górnicza, Poland; ORCID 0000-0001-7926-1155.

Shieh Chieh-Jen – Dr., Professor, Chang Jung Christian University, Taiwan; ORCID 0000-0002-6158-1983.

William H. Meyers – Emeritus Professor of Agricultural & Applied Economics Food and Agricultural Policy Research Institute, USA; ORCID 0000-0003-0952-5578.

Zdzisława Dacko-Pikiewicz – Professor, Rector University of Dabrowa Górnicza, Wyższa Szkoła Biznesu w Dąbrowie Górniczej, Poland; ORCID 0000-0003-4542-5574.

Plavčan Peter – Prof., CSc., Ing., Danubius University in Sládkovičovo, Slovak Republic.

ВІДОМОСТІ ПРО ЧЛЕНІВ РЕДАКЦІЙНОЇ КОЛЕГІЇ наукового журналу «Менеджмент»

Грищенко Іван Михайлович – доктор економічних наук, професор, академік Національної академії педагогічних наук України, Заслужений працівник освіти України, Лауреат Державної премії України в галузі науки та техніки, Київський національний університет технологій та дизайну, Україна – *головний редактор*; ORCID 0000-0001-7572-4757.

Ганущак-Єфіменко Людмила Михайлівна – доктор економічних наук, професор, Лауреат Національної премії України імені Бориса Патона, Київський національний університет технологій та дизайну, Україна – *заступник головного редактора*; ORCID 0000-0002-4458-2984.

Члени редакційної колегії

Касич Алла Олександрівна – доктор економічних наук, професор, Київський національний університет технологій та дизайну, Україна; ORCID 0000-0001-7019-1541.

Гнатенко Ірина Анатоліївна – доктор економічних наук, професор, Київський національний університет технологій та дизайну, Україна; ORCID 0000-0002-0254-2466.

Ольшанська Олександра Володимирівна – доктор економічних наук, професор, Київський національний університет технологій та дизайну, Україна; ORCID 0000-0003-1535-7742.

Олешко Анна Анатоліївна – доктор економічних наук, професор, Київський національний університет технологій та дизайну, Україна; ORCID 0000-0001-9328-7730.

Шкода Мар'яна Сергіївна – доктор економічних наук, професор, Київський національний університет технологій та дизайну, Україна; ORCID 0000-0002-7356-4320.

Лепейко Тетяна Іванівна – доктор економічних наук, професор, Харківський національний економічний університет імені Семена Кузнеця, Україна; ORCID 0000-0001-8667-509X.

Моргулець Оксана Борисівна – доктор економічних наук, професор, Київський національний університет технологій та дизайну, Україна; ORCID 0000-0001-6530-1478.

Радіонова Наталія Йосипівна – доктор економічних наук, доцент, Київський національний університет технологій та дизайну, Україна; ORCID 0000-0002-8855-2963.

Тарасенко Ірина Олексіївна – доктор економічних наук, професор, Київський національний університет технологій та дизайну, Україна; ORCID 0000-0003-3626-4377.

Вітковський Юрій Петрович – доктор економічних наук, професор, Державний біотехнологічний університет, Харків, Україна; ORCID 0000-0001-5806-8671.

Grzegorz Ostasz – D.Sc., PhD, International Relations Rzeszow University of Technology, Poland; ORCID 0000-0002-1974-6393.

Liliya Pan – PhD, Professor, EuroMed Academy of Business, Edinburgh Business School, Heriot-Watt University, Edinburgh; ORCID 0000-0001-9915-7208.

Rafał Rębilas – PhD, Vice-Rector, Akademia WSB, Dąbrowa Górnicza, Poland; ORCID 0000-0001-7926-1155.

Shieh Chich-Jen – Dr., Professor, Chang Jung Christian University, Taiwan; ORCID 0000-0002-6158-1983.

William H. Meyers – Emeritus Professor of Agricultural & Applied Economics Food and Agricultural Policy Research Institute, USA; ORCID 0000-0003-0952-5578.

Zdzisława Dacko-Pikiewicz – Professor, Rector University of Dąbrowa Górnicza, Wyższa Szkoła Biznesu w Dąbrowie Górniczej, Poland; ORCID 0000-0003-4542-5574.

Plavčan Peter – Prof., CSc., Ing., Danubius University in Sládkovičovo, Slovak Republic.

DOI: 10.30857/2415-3206.2023.2

TABLE OF CONTENTS

1. GORODETSKY Yu.	
Fundamental principles of predictive analytics in marketing	9
2. MATIASH S.	
Production activity as management in the socio-cultural sphere	22
3. STEPANOVA O., TONKYKH O.	
Management of the innovative provisioning process quality of tourist and hotel-restaurant business services	31
4. OLSHANSKA O., PUZYROVA P., SHEVCHENKO O.	
Integrative approach and clusterization as elements of effective tourism industry management in the conditions of sustainable development	48
5. CHERNIAVSKA O., HOLOVACHOV I.	
The conceptual basis for the formation and implementation of the marketing strategy for the innovative development of enterprises in digitalization conditions	61
6. GAVKALOVA N.	
Prospects for the development of the agricultural sector of Ukraine in the conditions of post-war recovery	740
7. IEVSEITSEVA O., MIHALATII O.	
The importance of marketing innovations as the basis of management of the enterprise's competitiveness	85
8. CHERNIAVSKA O., KAZNODII V.	
The innovative marketing management systems in digitalization conditions	96
9. KUVIKA G.	
Methodological approaches to assessing the competitiveness of hospitality establishments	107
10. HANUSHCHAK-YEFIMENKO L., HALAVSKA L., BAULA O., ARABULI S.	
Problems of professional burnout of scientific and pedagogical workers institutions of higher education in the conditions of war and ways to solve them	121
11. MAKATORA D., YASHCHENKO O., KUBANOV R.	
Features preparation of the project manager in the architecture and construction industry	133
12. SHEVCHENKO V.	
Didgitalization and international access to finance	151
13. HANUSHCHAK-YEFIMENKO L., HRYTSUN V.	
Foreign experience of managing the development of entrepreneurship using artificial intelligence	157
14. KRAKHMALOVA T.	
Methodological and legal aspects of evaluating the effectiveness of corporate management of companies	168
15. REBILAS R.	
Methodical approaches to the assessment of structural properties of integrated business structures	180

DOI: 10.30857/2415-3206.2023.2

ЗМІСТ

1. ГОРОДЕЦЬКИЙ Ю.	
Фундаментальні принципи предиктивного аналізу у сфері маркетингу	9
2. МАТЯШ С.	
Продюсерська діяльність як менеджмент у соціокультурній сфері	22
3. СТЕПАНОВА О., ТОНКИХ О.	
Управління інноваційним процесом забезпечення якості послуг туристичного та готельно-ресторанного бізнесу	31
4. ОЛЬШАНСЬКА О., ПУЗИРЬОВА П., ШЕВЧЕНКО О.	
Інтеграційний підхід та кластеризація як елементи ефективного управління туристичною галуззю в умовах сталого розвитку	48
5. ЧЕРНЯВСЬКА О., ГОЛОВАЧОВ І.	
Концептуальний базис формування та реалізації маркетингової стратегії інноваційного розвитку підприємств в умовах цифровізації	61
6. ГАВКАЛОВА Н.	
Перспективи розвитку агропромислового сектору України в умовах післявоєнного відновлення	740
7. Євсейцева О., МІГАЛАТІЙ О.	
Важливість маркетингових інновацій як основа управління конкурентоспроможністю підприємства	85
8. ЧЕРНЯВСЬКА О., Віталій КАЗНОДІЙ В.	
Інноваційні системи маркетингового управління в умовах цифровізації	96
9. КУВІКА Г.	
Методичні підходи до оцінки конкурентоспроможності закладів сфери гостинності	107
10. ГАНУЩАК-ЄФІМЕНКО Л., ГАЛАВСЬКА Л., БАУЛА О., АРАБУЛІ С.	
Проблеми професійного вигорання науково-педагогічних працівників закладів вищої освіти в умовах війни та шляхи їх вирішення	121
11. МАКАТЬОРА Д., ЯЩЕНКО О.², КУБАНОВ Р.	
Особливості підготовки проектного менеджера архітектурно-будівельної галузі	133
12. ШЕВЧЕНКО В.	
Диджиталізація та міжнародний доступ до фінансів	151
13. ГАНУЩАК-ЄФІМЕНКО Л., ГРИЦУН В.	
Зарубіжний досвід управління розвитком підприємництва з використанням штучного інтелекту	157
14. КРАХМАЛЬОВА Т.	
Методико-правові аспекти оцінювання ефективності корпоративного управління компаніями	168
15. РЕБІЛАС Р.	
Методичні підходи до оцінювання структурних властивостей інтегрованих бізнес структур	180

JEL Classification:
M31, Q13, Z33

UDC 339.138

DOI: 10.30857/2415-
3206.2023.2.1

FUNDAMENTAL PRINCIPLES OF PREDICTIVE ANALYTICS IN MARKETING

Yuri GORODETSKY¹

¹ *Kyiv National University of Technologies and
Design, Kyiv, Ukraine*

INTRODUCTION. This article highlights the fundamental principles of predictive analytics as they apply to marketing, providing the reader with a thorough understanding of the methodologies and techniques used to predict consumer behavior and optimize marketing strategies.

RESEARCH HYPOTHESIS. The article examines the key concepts and approaches underlying predictive analytics, including machine learning, statistical analysis, and forecasting algorithms.

THE AIM of particular attention is paid to the application of these methods in various areas of marketing, such as market segmentation, pricing, product portfolio management, and determining the effectiveness of advertising campaigns.

METHODS. The article examines the ethical and legal aspects of predictive analytics in marketing, emphasizing

the importance of responsible use of data and algorithms.

FINDINGS. The final section of the article focuses on the future development of predictive analytics in marketing, discussing new technologies, methods, and approaches that can contribute to improving the accuracy and efficiency of forecasts.

CONCLUSION. The author expresses confidence that the further development and integration of predictive analysis into marketing strategy will contribute to the creation of more targeted and effective marketing campaigns while ensuring sustainable growth and competitiveness of companies in the market.

KEYWORDS: predictive analysis; marketing; pricing; business development; marketing strategies; marketing tactics.

NUMBER OF REFERENCES	NUMBER OF FIGURES	NUMBER OF TABLES
18	0	0

JEL Classification:
M31, Q13, Z33

УДК 339.138

DOI: 10.30857/2415-
3206.2023.2.1

ФУНДАМЕНТАЛЬНІ ПРИНЦИПИ ПРЕДИКТИВНОГО АНАЛІЗУ У СФЕРІ МАРКЕТИНГУ

Юрій ГОРОДЕЦЬКИЙ¹

¹ Київський національний університет технологій
та дизайну, Київ, Україна

ВСТУП. У цій статті висвітлюються фундаментальні принципи предиктивного аналізу, які знаходять застосування у сфері маркетингу, надаючи ґрунтовне розуміння методологій та технік, які застосовуються для прогнозування споживчої поведінки та оптимізації маркетингових стратегій.

ГІПОТЕЗА ДОСЛІДЖЕННЯ. У статті розглядаються ключові концепції та підходи, що лежать в основі предиктивного аналізу, включаючи машинне навчання, статистичний аналіз та алгоритми прогнозування.

МЕТА це виявлення оптимального застосування цих методів у різних галузях маркетингу, таких як сегментація ринку, ціноутворення, управління продуктовим портфелем та визначення ефективності рекламних кампаній.

МЕТОДИ. У статті розглядаються етичні та юридичні аспекти та методи предиктивного аналізу у маркетингу, наголошуючи на

важливості відповідального використання даних та алгоритмів.

РЕЗУЛЬТАТИ. Завершальний розділ статті присвячений майбутньому розвитку предиктивного аналізу у маркетингу, обговорюючи нові технології, методи та підходи, які можуть зробити свій внесок у покращення точності та ефективності прогнозів.

ВИСНОВКИ. Автор висловлює впевненість у тому, що подальший розвиток та інтеграція предиктивного аналізу в маркетингову стратегію сприятиме створенню більш цілеспрямованих та результативних маркетингових кампаній, забезпечуючи при цьому стійке зростання та конкурентоспроможність компаній на ринку.

КЛЮЧОВІ СЛОВА: предиктивний аналіз; маркетинг; ціноутворення; розвиток бізнесу; маркетингові стратегії; маркетингові тактики.

Statement of the problem. With the continuous development of technology and the increasing complexity of the market environment, predictive analytics is becoming a key tool in the arsenal of marketers. Predictive analytics, based on machine learning, statistical analysis, and predictive algorithms, offers unique opportunities to understand and anticipate consumer behavior, optimize marketing strategies, and improve the effectiveness of advertising campaigns.

However, despite the vast opportunities offered by predictive analytics, there are many outstanding issues and challenges that require the attention of researchers and practitioners. Key among these include selecting and applying appropriate methodologies and techniques, adapting them to specific marketing contexts and challenges, and ensuring the ethical and legitimate use of data and algorithms.

The article seeks to systematize the existing knowledge in the field of predictive analytics in marketing, highlight the main principles and approaches, and assess their applicability in different areas of marketing activities. Special attention is paid to the analysis of ethical and legal aspects of the use of predictive analytics, which is a relevant and important task in the context of increasing requirements for the protection of personal data and responsibility for their use.

Thus, the article is aimed at forming a comprehensive view of the application of predictive analytics in marketing, identifying promising areas of research in this area, and offering recommendations for practitioners seeking to effectively use the potential of predictive analytics to achieve competitive advantages and improve the effectiveness of marketing strategies.

Analysis of recent publications on the problem. In recent years, there has been significant progress in the development of new methods of predictive analysis. In particular, machine learning methods based on artificial neural networks are being actively developed. These methods allow for solving more complex problems than traditional statistical methods.

In the field of marketing, new methods of predictive analysis are used to solve the following tasks: demand forecasting, personalization of marketing messages, and determining the effectiveness of advertising campaigns.

There is a large number of studies evaluating the effectiveness of predictive analyses in various marketing tasks. These studies show that predictive analytics can be an effective tool for improving the effectiveness of marketing campaigns.

Overall, predictive analytics is a rapidly growing field that has great potential for use in marketing. Further research in this area will focus on developing new predictive analytics methods, evaluating their effectiveness in various marketing tasks, and addressing the ethical and legal issues associated with the use of predictive analytics.

The purpose of the study. This study aims to comprehensively analyze and systematize the fundamental principles of predictive analytics relevant to the

context of marketing. The aim is to provide readers with a thorough understanding of how predictive analytics techniques, including machine learning, statistical analysis, and predictive algorithms, can be applied to predict consumer behavior and optimize marketing strategies.

The study focuses on analyzing the use of predictive analytics in various aspects of marketing such as market segmentation, pricing policy formulation, product portfolio management, and evaluating the effectiveness of advertising campaigns. The aim is to identify how these techniques can help improve the accuracy and efficiency of marketing decision-making, which can ultimately lead to increased profits and a stronger market position for the company.

The aim of the study is not only to provide a broad overview of the principles and methods of predictive analytics in marketing but also to identify areas for further research and improvement of these methods within marketing activities.

The main results and their justification. The article discusses the basics of predictive analytics in marketing, an overview of the main concepts and definitions, as well as methods that are actively used by businesses today.

Predictive analytics is a data analysis methodology that uses statistical algorithms and machine learning techniques to predict future events and trends based on available historical data. In marketing, predictive analytics can predict consumer preferences, customer behavior, and the results of marketing campaigns, which helps companies plan their marketing efforts more effectively and make informed decisions.

The core concepts of predictive analytics in marketing include:

- **Machine Learning:** it is a subsection of artificial intelligence that provides computers with the ability to learn from experience and data without explicit programming. Machine Learning is used in predictive analytics to create models that can predict future events based on analyzing past data.

- **Training Dataset:** is a dataset that is used to train machine learning models. It consists of historical data including various variables and a target variable to be predicted. The model is learned from the training data to identify patterns and regularities.

- **Target Variable:** this is the variable that the machine learning model is trying to predict. In marketing, this could be, for example, the likelihood of a customer buying a product, the conversion rate of a marketing campaign, or the cost of a purchase.

- **Features:** these are the variables that are used to predict the target variable. In marketing, features can be data about customers such as age, gender, purchase history, interests, and other factors that influence their behavior.

- **Machine learning algorithms:** there are many machine learning algorithms that are used to solve various predictive analytics problems. Some of

the most common algorithms include linear regression, decision trees, random forest, gradient boosting, and neural networks.

- **Cross-Validation:** it is a method of evaluating the performance of machine learning models based on available data. It evaluates how well a model generalizes its results to new data and avoids overfitting.

- **Prediction:** is the process of using a trained model to predict the values of a target variable on new data that the model has not seen before.

In marketing, predictive analytics is used to forecast various events and indicators, such as the likelihood of customer churn, assess the effectiveness of marketing campaigns, determine the most likely customer purchases, and others. It helps companies make more informed decisions, reduce risks, and optimize their marketing efforts to achieve more successful results.

In marketing, predictive analytics has a wide range of applications and can be used in a variety of areas to improve the effectiveness of marketing strategies and enhance customer interactions. Some of the most common applications of predictive analytics in marketing include:

- **Predicting the likelihood of customer churn:** Predictive analytics can help companies identify customers at high risk of leaving and predict the likelihood of churn for each customer. This allows timely action to be taken to retain customers, such as offering personalized discounts, bonuses, or loyalty programs.

- **Personalized marketing:** Predictive analytics helps to understand customer preferences and needs based on their previous actions and behaviors. This allows companies to offer personalized offers and recommendations, which improves customer experience and increases the likelihood of purchases.

- **Optimize advertising campaigns:** with predictive analytics, companies can identify the most effective advertising channels and optimize marketing campaign budgets. Predictive analytics models can predict the results of advertising campaigns and identify the most promising audience segments.

- **Sales Forecasting:** predictive analytics can help companies forecast future sales based on historical sales data and factors affecting demand. This helps companies plan their production activities and manage inventory of goods more accurately.

- **Identifying the most promising customers:** predictive analytics can be used to identify the most promising customers who have the highest probability of making a purchase in the near future. This allows you to focus your marketing efforts on the most promising audiences and increases conversion rates.

- **Determining optimal prices:** predictive analytics can help determine the optimal prices for a company's products or services, taking into account demand,

competition, and other factors. This allows you to set prices that maximize profits and meet customer needs.

- **Analyze the effectiveness of communication channels:** predictive analytics can help determine the most effective channels for communicating with customers, such as email, social media, SMS, etc. This helps optimize marketing efforts and improve audience engagement.

All these applications of predictive analytics in marketing help companies make better-informed decisions, improve customer interactions, and enhance the effectiveness of marketing strategies. It allows companies to be more competitive in the market and successfully adapt to changing conditions and consumer demands.

By analyzing the current situation with the study of scientific works of world authors, it is possible to summarise all the methods and approaches to data analysis for predicting and identifying trends in consumer behavior and markets that exist and are currently used.

Predictive analytics in marketing is a powerful tool that allows companies to predict future trends and events based on the analysis of historical data. Various data analysis techniques and approaches are used to achieve this goal. Let's take a look at some of them:

1. *Regression Analysis:* Regression analysis is used to assess the relationship between a dependent variable (target) and one or more independent variables (attributes). In marketing, it can be used to forecast sales based on advertising costs, determine the effect of price on demand, or assess the impact of marketing campaigns on customer behavior.

2. *Cluster Analysis:* Cluster analysis is used to group objects (e.g., customers) based on their similarity in a number of characteristics. This identifies audience segments with common needs and behaviors. Cluster analysis helps in creating more personalized marketing strategies for different customer segments.

3. *Time Series Methods:* Time series methods are used to predict future values based on temporal data (e.g., sales by month, and daily website visits). This helps in identifying seasonal fluctuations, trends, and other periodic patterns that help companies take appropriate actions in their marketing strategies.

4. *Classification models:* Classification models are used to predict whether an object belongs to a particular class or category. In marketing, this can be used to determine the likelihood of a customer making a certain decision (e.g., buying a product) based on their profile and behavior.

5. *Machine learning techniques:* Machine learning methods involve various algorithms that allow computers to "learn" from data and make predictions on new data. Some of the popular machine learning techniques used in marketing include random forests, gradient boosting, and neural networks.

6. *Network Analysis*: Network analysis is used to study the relationships between objects in a network (e.g., social networks). In marketing, it can be used to analyze the influence of key opinion leaders on the behavior of other users and identify the most important nodes in the network to attract new customers.

7. *Text analysis*: Text analysis allows companies to analyze textual information from customer reviews, social media, and other sources. This helps to understand public opinion about the brand and products, identify trends and issues, and develop more effective communication strategies.

The basic methods and approaches to data analysis in predictive analytics help marketers predict consumer preferences, identify trends in the market, forecast the results of marketing campaigns, and optimize strategies to improve customer interactions and achieve more successful results.

Let's continue with a look at the methods and approaches of predictive analytics in marketing:

8. *Social Media Analytics*: Social media is a rich source of data on consumer behavior and opinions. Social media analysis allows companies to monitor discussions about their brand, products, and customer feedback. This helps in identifying trends, identifying key themes and sentiments, and tracking reactions to marketing campaigns.

9. *Forecasting LTV (customer lifetime value)*: Determining the LTV of a customer is an important task for marketing. Predictive analytics can predict how much revenue a customer will bring to the company over their lifetime with the brand. This helps in determining the cost of customer acquisition and allocating marketing budget keeping in mind the potential profit from the customers.

10. *Cohort Analysis*: Cohort analysis is used to study groups of customers who started interacting with a company in the same period of time. Cohort analysis helps to understand how customer behavior changes over time and what factors influence customer loyalty and engagement. This helps in identifying successful marketing strategies and attractive customer segments.

11. *Network effects analysis*: In certain business areas such as social media platforms, messengers, and online marketplaces, network effects play an important role. Predictive analytics can assess the impact of network effects on attracting new users and increasing activity on the platform.

12. *Conversion Forecasting*: Conversion prediction in marketing is important to understand which engagement channels and marketing efforts are most effective. Predictive analytics helps to determine the likelihood of customer conversions at each stage of the sales funnel and identify the most significant factors influencing purchase decisions.

13. *Assortment Analysis*: Assortment analysis helps to determine which products or services are most popular with customers and which ones can be

most profitable. Predictive analytics helps to determine the optimal product mix that satisfies customer needs and generates the most profit for the company.

14. *Price sensitivity analysis*: Pricing is an important aspect of marketing. Price sensitivity analysis helps to determine how changes in the prices of products or services affect the demand and revenues of a company. Predictive analytics can predict customer reactions to price changes and determine optimal pricing strategies.

15. *Universal Salsa method*. The predictive analytics method allows to creation of links between all structural units of the business for predictive calculations, creation of strategic plans, and compensation of external and internal risks for the company.

All these methods and approaches of predictive analytics in marketing help companies to more accurately predict customer behavior, identify trends in the market, make informed decisions, and optimize marketing strategies. This allows companies to be successful in the marketplace, retain existing customers attract new ones, and effectively utilize their marketing resources.

Examples of successful use of predictive analytics in marketing and brand management include:

- *Personalized marketing and product recommendations*: Major online retailers such as Amazon and Netflix have successfully used predictive analytics to provide personalized recommendations to customers. They analyze historical data on users' purchases, views, or ratings to predict which products or movies each customer might be interested in. This approach increases the likelihood of customer purchase and retention.

- *Predicting customer churn*: Telecom companies, ISPs, and banks are actively using predictive analytics to predict customer churn. By analyzing data on customer behavior, activity, and interactions, predictive analytics can identify signs of potential churn. This enables companies to take measures to retain customers by offering personalized offers and discounts.

- *Optimization of advertising campaigns*: Advertising agencies and advertisers use predictive analytics to optimize advertising campaigns. By analyzing data on audience behavior, audience characteristics, and advertising platforms, they can identify the most effective advertising channels and formats. This approach helps to reduce advertising costs and increase conversion rates.

- *Determining optimal pricing*: Retailers and manufacturers use predictive analytics to determine optimal product pricing. By analyzing data on price changes and customer response to them, optimal price ranges can be identified to maximize revenue and customer satisfaction.

- *Analyzing the effectiveness of marketing campaigns*: Companies can apply predictive analytics to analyze the effectiveness of their marketing

campaigns. Predicting the results of future campaigns based on analyzing past data can identify the most promising approaches, channels, and messages.

- *Demand Prediction:* Manufacturing companies use predictive analytics to forecast demand for their products. By analyzing data on sales, seasonal factors, marketing promotions, and other influencing factors, trends can be identified and predictions become more accurate.

- *Competitor Analysis:* Predictive analytics helps companies analyze data about competitors and their market activity. This helps in predicting competitors' actions, their reactions to marketing strategies, and adapting their actions according to the market situation.

- *Inventory Management:* Retailers and manufacturing companies use predictive analytics to optimize inventory and stock management. Forecasting future demand based on sales data and seasonal variations can reduce storage costs and mitigate the risk of surplus or shortages.

These are just a few examples of the successful use of predictive analytics in marketing and brand management. All of these applications enable companies to make informed decisions, improve customer engagement, optimize marketing strategies, and achieve outstanding market results.

Further examples of successful uses of predictive analytics in marketing and brand management can also be discussed below:

1. *Predicting content performance.* Content marketing companies can use predictive analytics to predict the effectiveness of content material. By analyzing data on audience response to different types of content (articles, videos, infographics, etc.), they can identify the formats and topics that are most appealing to audiences.

2. *Analyzing the impact of events and promotions.* Predictive analytics helps assess the impact of various events and marketing promotions on customer behavior. Companies can predict the effects of discount promotions, loyalty programs, advertising campaigns, and events on sales and customer loyalty.

3. *Analyzing the effectiveness of email marketing.* Predictive analytics is used to analyze the results of email marketing and determine the best strategies to engage with customers. This includes determining the optimal time to send emails, content that is most appealing to different audience segments, and assessing the likelihood of opening and responding to emails.

4. *Web content optimization.* Predictive analytics helps in optimizing the web content provided to website visitors. By analyzing data about users' on-site behavior, interests, and actions, it can predict what content is most appealing to audiences and adapt the site to improve user experience and conversions.

5. *Analyzing the effectiveness of social media.* Predictive analytics allows you to measure the results of your social media marketing efforts. Analyzing

data on user interactions with content, posts, and ad campaigns helps identify the most effective platforms, content types, and topics to engage audiences.

6. *Predicting product popularity.* Manufacturers and retailers use predictive analytics to predict the popularity of new products. By analyzing data from previous sales and advertising campaigns, they can estimate the potential demand for a new product and determine its success in the market.

7. *Predicting the outcome of events and sponsorships.* Companies sponsoring events or sports teams can use predictive analytics to forecast the outcome and performance of their investments. This allows them to determine which events or teams are most appealing to audiences and which events will generate the greatest return.

These examples demonstrate how predictive analytics is being used to optimize marketing strategies, improve customer engagement, and achieve successful brand management outcomes. It enables companies to adapt to rapidly changing market conditions, anticipate customer needs, and act more effectively to drive business growth and brand strength.

But still, the main point of using predictive analytics is a company's product policy. Applying predictive analytics to select an optimal brand portfolio is a critical success factor for a company, especially in economic crises. An effective brand portfolio allows a company to maximize revenues, improve competitiveness, and manage risk effectively. Let's look at how predictive analytics can be applied to this task:

1. *Analyzing sales and profitability data.* Predictive analytics allows you to analyze the sales and profitability data of each brand in the company. Based on this data, it can be determined which brands are generating the most revenue and which may have the potential for further growth. Such analyses identify the most successful and promising brands to focus on.

2. *Forecasting demand and trends.* Predictive analytics allows you to forecast future demand for each brand's products. This involves analyzing data on sales, marketing promotions, competitive factors, and customer behavior. Demand forecasting helps to determine which brands will be most in demand in the market and which may face a decline in demand.

3. *Analyzing the competitive environment.* Predictive analytics allows you to analyze data about the competitive environment and competitors' actions. This includes analyzing prices, marketing campaigns, market positioning, and customer response to competitive offerings. Such analyses help in identifying the advantages and weaknesses of each brand as compared to its competitors.

4. *Audience segmentation.* Predictive analytics allows you to segment your audience based on their preferences, behaviors, and characteristics. This helps in determining which brands are most popular among different audience segments and which can be more successful in certain market segments.

5. *Determining the strategic role of brands.* Predictive analytics helps in determining the strategic role of each brand in the company's portfolio. This involves analyzing data on each brand's positioning, unique characteristics, and target audience. Defining the strategic role identifies the core brands that serve as the foundation of the business, as well as complementary brands that can support the core brands or seek new markets.

6. *Making decisions to add or reduce brands.* Based on analyzing data and forecasts, predictive analytics helps companies make decisions to add new brands to the portfolio or reduce the number of brands. This allows optimizing the portfolio by removing less successful brands or investing in brands with high potential

7. *Risk and Opportunity Modelling.* Predictive analytics allows companies to model different risk and opportunity scenarios for each brand. This includes analyzing possible economic crises, changes in consumer behavior, competitive activity, and other factors that could affect the success of a brand. Modeling risks and opportunities allows companies to develop strategies to reduce risks and seize opportunities for each brand.

8. *Brand lifecycle analyses.* Predictive analytics allows analyzing the life cycle of each brand in a company's portfolio. This includes analyzing data on sales, growth, maturity, and decline of products. Life cycle analysis helps to identify brands that are at different stages of their development and make decisions on their future management.

9. *Analyzing the effectiveness of marketing investments.* Predictive analytics helps to evaluate the effectiveness of marketing investments for each brand in the portfolio. This includes analyzing data on the costs of marketing activities and their impact on sales and brand awareness. Evaluating marketing investment performance helps identify the most successful marketing strategies and allocate the budget most effectively.

10. *Analyzing the impact of brands on the overall value of the company.* Predictive analytics assesses the impact of each brand in the portfolio on the overall value of the company. This includes analyzing the revenue, profitability, and risk data of each brand. Analyzing the impact of brands on the value of the company allows you to identify the company's key assets and optimize the management of the brand portfolio to maximize value.

11. *Development of profitability forecasts.* Based on the data and forecasts generated by predictive analytics, companies can develop profitability forecasts for each brand in the portfolio. The forecasts help in determining the financial goals and development plans of the brands in the long and short term.

12. *Cannibalization effect analysis.* Predictive analytics helps in determining the cannibalization effect between different brands in the portfolio. Cannibalization occurs when one product or brand competes with other products

or brands of the same company. Analyzing the cannibalization effect allows companies to take measures to optimize product mix and positioning.

Predictive analytics is a powerful tool for companies looking to optimize their brand portfolio. By analyzing data and making predictions, companies can make informed decisions, adapt to changing market conditions, and create more successful marketing strategies for each brand in their portfolio.

Over the course of this article, we have taken a detailed look at the fundamental principles of predictive analytics and their application to marketing. Predictive analytics is a powerful tool that relies on statistical analysis, machine learning, and predictive algorithms to not only predict consumer behavior with a high degree of accuracy but also to optimize marketing strategies based on the findings.

We focus on the key concepts and methodologies that underpin predictive analytics and look at how these approaches can be integrated into marketing activities. Predictive analytics has a tremendous impact on making informed and effective marketing decisions, which ultimately leads to increased ROI and enhanced competitive advantage for the company.

However, it should be noted that the successful application of predictive analytics requires not only knowledge of relevant methods and tools but also the availability of quality data and an understanding of market specifics and consumer behavior. In addition, it is important to be aware of the possible ethical and legal implications of using predictive analytics, especially in the context of handling personal customer data.

In conclusion, we would like to emphasize that predictive analytics is an integral part of modern marketing, and its role will only increase as technology develops and the amount of available data increases. Mastering the principles and methods of predictive analytics will allow marketers not only to effectively predict future trends and consumer behavior but also to form more personalized and targeted marketing campaigns, thus increasing customer satisfaction and ensuring sustainable business growth.

REFERENCES:

- Siegel, E. (2016). *Predictive Analytics: The Power to Predict Who Will Click, Buy, Lie, or Die*. Wiley. 368 p.
- Provost, F., Fawcett, T. (2013). *Data Science for Business: What You Need to Know about Data Mining and Data-Analytic Thinking*. O'Reilly Media. 414 p.
- Dean, J. (2014). *Big Data, Data Mining, and Machine Learning: Value Creation for Business Leaders and Practitioners*. Wiley. 288 p.
- Bari, A., Chaouchi, M., Jung, T. (2014). *Predictive Analytics For Dummies*. 360 p.
- Kuhn, M., Johnson, K. (2013). *Applied Predictive Modeling*. Springer. 600 p.
- Murphy, K. P. (2012). *Machine Learning: A Probabilistic Perspective*. MIT Press. 1104 p.
- Miller, T. W. (2015). *Marketing Data Science: Modeling Techniques in Predictive Analytics with R and Python*. FT Press. 225 p.

- Kotu, V., Deshpande, B., Kaufmann, M. (2014). Predictive Analytics and Data Mining: Concepts and Practice with RapidMiner. 446 p.
- Jeffery, M. (2010). Data-Driven Marketing: The 15 Metrics Everyone in Marketing Should Know. Wiley. 320 p.
- Flach, P. (2012). Machine Learning: The Art and Science of Algorithms that Make Sense of Data. Cambridge University Press. 409 p.
- Li, A. et al. (2020). Machine Learning and Predictive Analytics in Marketing. *Journal of Business Research*.
- Cheng, H. et al. (2018). Predictive Analytics for Customer Engagement: A Review. *Journal of Interactive Marketing*.
- Kim, Y. et al. (2019). The Impact of Predictive Analytics on Marketing Strategy. *Marketing Science*.
- Martinez, L. et al. (2020). Predictive Analytics in Marketing: From Theory to Practice. *Journal of Marketing Analytics*.
- Chow, S. et al. (2019). Customer Lifetime Value Prediction Using Machine Learning: A Literature Review and Future Research Directions. *International Journal of Information Management*.
- Braun, G. et al. (2018). The Integration of Machine Learning and Marketing: Opportunities and Challenges. *Journal of Marketing*.
- Kang, M. et al. (2020). Predictive Analytics and Personalization in Marketing: An Overview and Future Research Directions. *European Journal of Marketing*.
- Shah, S. et al. (2019). The Role of Big Data and Predictive Analytics in Retailing. *Journal of Retailing*.

AUTHOR (S) BIOSKETCHES



Gorodetsky Yuri, postgraduate student, assistant at the Department of Marketing and Communication Design, Kyiv National University of Technologies and Design, Ukraine

<https://orcid.org/0000-0003-3555-8234>

E-mail: gorodetsky9535@gmail.com

COPYRIGHTS

©2023 The author(s). This is an open access article distributed under the terms of the Creative Commons Attribution (CC BY 4.0), which permits unrestricted use, distribution, and reproduction in any medium, as long as the original authors and source are cited. No permission is required from the authors or the publishers.

HOW TO CITE THIS ARTICLE

Gorodetsky, Yu. (2023). Fundamental principles of predictive analytics in marketing. *Management*, 2(38): 9–21. <https://doi.org/10.30857/2415-3206.2023.2.1>.

JEL Classification:
Z11

UDC 7.075:008:
338.3-028.26

DOI: 10.30857/2415-
3206.2023.2.2

PRODUCTION ACTIVITY AS MANAGEMENT IN THE SOCIO-CULTURAL SPHERE

Serhii MATIASH¹

¹*Kyiv National University of Technologies and
Design, Kyiv, Ukraine*

INTRODUCTION AND PURPOSE OF THE STUDY. The development of the modern socio-cultural sphere not only puts forward certain requirements for the effectiveness of managing this creative branch of the spiritual development of society, but also requires significant efforts in its study and training of relevant specialists. In the context of modern challenges and crisis situations, the concept of the producer as a rather new but largely central figure has not yet received appropriate official and public recognition in our country. It is this that determines the relevance of the study and analysis of production in order to identify optimal strategies for the development of its managerial potential.

METHODOLOGY OF SCIENTIFIC RESEARCH. To achieve the goal, general scientific research methods were used, including induction and deduction, comparison, analysis of scientific literature, and expert analysis.

CONCLUSIONS AND PROSPECTS FOR FURTHER RESEARCH. The conducted analysis showed that the performance of production functions within the framework of certain creative projects requires a significant number of

managerial defects, as well as personal, professional and entrepreneurial qualities. The combination of these components contributes to a constant increase in the efficiency of production management.

The effectiveness of production projects is an indicator and a kind of catalyst of socio-cultural development of society. The production paradigm is a synthesis of a cultural product and its consumer, a creative and commercial component, which reveals optimal strategies for its development.

Professional production education, understanding of the creative and entrepreneurial potential of this profession, which today is spreading significantly, is an objective consequence of the development of the show industry, the spread of its spheres of existence.

That is why further studies of production activity in the structure of the socio-cultural sphere will reveal problems in its implementation, state legal regulation of production activity, methodical support, training of specialists.

KEYWORDS: production; manager; management; production activity; culture; show business; socio-cultural sphere.

NUMBER OF REFERENCES	NUMBER OF FIGURES	NUMBER OF TABLES
9	0	0

JEL Classification:
Z11

УДК 7.075:008:
338.3-028.26

DOI: 10.30857/2415-
3206.2023.2.2

ПРОДЮСЕРСЬКА ДІЯЛЬНІСТЬ ЯК МЕНЕДЖМЕНТ У СОЦІОКУЛЬТУРНІЙ СФЕРІ

Сергій МАТЯШ¹

¹ Київський національний університет технологій
та дизайну, Київ, Україна

ВСТУП І МЕТА ДОСЛІДЖЕННЯ.

Розвиток сучасної соціокультурної сфери не тільки висуває певні вимоги до ефективності управління цією креативною галуззю духовного розвитку суспільства, але і вимагає значних зусиль у її вивченні та підготовці відповідних фахівців. У контексті сучасних викликів і кризових ситуацій поняття продюсера як досить нової але в значній мірі центральної фігури ще не отримала в нашій країні відповідного офіційного та суспільного визнання. Саме цим зумовлена актуальність вивчення і аналізу продюсування з метою виявлення оптимальних стратегій для розвитку його менеджерського потенціалу.

МЕТОДОЛОГІЯ НАУКОВОГО ДОСЛІДЖЕННЯ.

Для досягнення мети були використані загальнонаукові методи дослідження, зокрема індукція та дедукція, порівняння, аналіз наукової літератури, експертний аналіз.

ВИСНОВКИ ТА ПЕРСПЕКТИВИ ПОДАЛЬШИХ ДОСЛІДЖЕНЬ.

Проведений аналіз показав, що виконання продюсерських функцій в рамках певних творчих проєктів потребують як значної кількості менеджерських вад, так і якостей

особистих, професійних та підприємницьких. Поєднання цих складових сприяє сталому підвищенню ефективності продюсерського менеджменту.

Ефективність продюсерських проєктів є показником і своєрідним каталізатором соціокультурного розвитку суспільства. Парадигма продюсування складає синтез культуротворчого продукту і його споживача, творчої та комерційної складової, що виявляє оптимальні стратегії його розвитку.

Фахова продюсерська освіта, розуміння творчого і підприємницького потенціалу цієї професії, який сьогодні значно поширюється є об'єктивним наслідком розвитку шоу-індустрії, поширення сфер її існування.

Саме тому подальші дослідження продюсерської діяльності в структурі соціокультурної сфери дозволить виявити проблеми в її реалізації, державне правове регулювання продюсерської діяльності, методичного забезпечення, підготовки спеціалістів.

КЛЮЧОВІ СЛОВА: продюсерство; менеджер; менеджмент; продюсерська діяльність; культура; шоу-бізнес; соціокультурна сфера.

Introduction. A famous aphorism says: a producer is a person who never puts off until tomorrow what he can make others do today.

The terms "producer" and "manager" are quite similar in their meaning from the point of view of production functions – they have their significant differences. What is the relationship of the producer of this or that socio-cultural project to management and entrepreneurship?

The emergence of show business in Ukraine is usually associated with the creation and exploitation of trademarks associated with certain musical performers or certain show structures of a commercial nature. Iryna Bilyk, created by Yuriy Nikitin, "Music Exchange" by Yevgeny Rybchinsky and others, can be called one of the first, but especially bright ones.

Discussion. The first stage in the development of entrepreneurship in show business is usually associated with attention to risk-taking by the producer-entrepreneur, which has become the main distinguishing feature of this type of activity.

At the next stage of show business development, there is the selection of a production institute. Despite the fact that during this period, the creators of various projects, for certain reasons, do not particularly try to position themselves as "producers", they somehow performed a number of functions, which today are an integral part of the work of a producer. Among the projects that arose at that time, in addition to musical ones, we can mention theater enterprises, radio and television channels, and many others.

In the future, entrepreneurship in the field of culture is associated with the selection of an innovative component as the main distinguishing feature. This is the appearance of numerous record companies, production centers that were interested in obtaining a certain final product and profit from its sale in the market of the show industry. In this connection, their competition arises.

Television and radio are connected to the process of promoting the producer's product. Specialized music channels are being created on television and radio, which contributes to the formation of an institute for the production of creative teams.

Technological innovations are also taking place. Thus, the appearance of CD-carriers led to an increase in sales volumes, however, not only on the legal, but also on the pirate market. For example, music and video products begin to be reproduced in the form of CDs, where the highest level of quality for that period is achieved.

Socio-cultural entrepreneurship begins to be characterized by highlighting the personal qualities of the producer. Among them, the ability to respond to changes in the economic and social situation, independence in choice and decision-making stand out in the scientific literature. The figure of the showman

increasingly begins to play the role of a regulator of economic relations in the sphere of leisure.

For example, in the music industry, the stage of free competition ends, which leads to the appearance of the main majors, record giants of the music market; formation of a creative team that works with the artist; introduction of the concepts "quality", "format", "commercial potential"; distribution of promotion responsibilities among various project partners: sponsors, producers of various levels, members of the production team, etc.

Radical changes are also taking place among the executive producers, primarily of a bureaucratic nature, which leads to the following results:

- formation of large producer structures;
- introduction of lawyers norms and standards;
- establishment of job duties and responsibilities.

Today, in the field of show business, new promotion channels are used - the Internet network appears, as well as a new audio recording format - mp3, which leads to both positive and negative changes in this field of activity. The first include: high product quality, freedom of choice of content (the user downloads only what he likes, and the producer loses the opportunity to sell something "on the sidelines". The negative ones include unlimited copying of digital files, a decrease in business turnover due to the gradual abandonment of physical media and many other factors.

The field of professional management is changing. The figure of the manager becomes an integral part of any production process and plays a significant role in the activity of any enterprise. At the same time, the manager possesses a certain set of qualities, abilities and carries the functions inherent in this profession, which are not limited to the organization and coordination of processes, but also contain innovative, psychological and other components.

The state, which directly or indirectly participates in the process of development of market relations in the field of culture, has a significant influence and sometimes dominance. Here we can talk about the factors that stimulate or inhibit the growth of the forces of free enterprise.

In this way, we simultaneously considered the process of development of interrelated spheres of activity – production, management in the context of socio-cultural entrepreneurship. Over the long years, these institutions underwent many changes and finally grew into large layers of socio-economic relations. All these processes were cyclical in nature. This is especially evident in the genesis of show business. During the existence of artistic councils, the figure of the producer was destroyed as much as possible, all functions were entrusted to the artistic director, impresario, etc., that is, to all members of the creative team. Then the collectives have a producer who manages the performance of all these duties. And the producer confidently enters the scheme

of relations between the artist and the record label. After some time, everything returns to the previous form of relations. A whole creative team works on the promotion of a show product, which creates a certain brand.

To determine the similarities and differences between the figures of the producer and the manager, consider the conceptual apparatus.

As a rule, the concept of "management" is considered in the scientific literature as a special type of management, implemented in market conditions, aimed at the rational use of material, human and other resources by applying the principles, functions and methods of this institute to achieve the intended goals of the organization. Sometimes management is defined as an independent type of professional activity related to personnel management, which to some extent narrows the scope of management activity, but, nevertheless, reflects its main specificity. In any case, the necessary components of management are knowledge of the market, the desire to maximize profits, and effective personnel management.

In this regard, when interpreting the concept of "entrepreneurship" in modern science, there are different approaches. Thus, in the English-language literature, it is defined "as the process of creating something new that has value", and an entrepreneur - "as a person who spends all the necessary time and effort on this, takes all financial, psychological and social risks, receiving as a reward money and pleasure will be achieved." At the same time, the authors point to the specificity of entrepreneurship in personal responsibility and independent decision-making.

In our opinion, entrepreneurship is a special type of economic activity, which is understood as a purposeful activity for obtaining profit. At the same time, the main components of entrepreneurship are the aspect of ownership, autonomy and independence in decision-making, initiative and innovativeness.

As stated in a famous aphorism, a producer is a manager who sells emotions.

The conclusion of the study of many points of view and opinions of specialists regarding the production process, as well as the direct study of this field of activity leads to the definition of this concept as a special type of activity in show business, which involves the creation and promotion of a musical, film, television or other project, which combines creative and commercial potential. At the same time, the main components of production are individuality, creativity and popularity.

Based on the definitions of management and production, as well as the functions performed by a manager, producer, and generally an entrepreneur in the process of their activity, it is possible to highlight their main similarities and differences.

First, consider the similarities. What do the work of a producer and an entrepreneur have in common?

The main thing is the risk that both the producer and the entrepreneur bear. If you pay attention to the purpose of their activity, it is satisfaction from work and obtaining profit.

They should be creative individuals, first of all. In addition, it is important to have an idea of the business, to be able to optimize costs in order to invest in the funds allocated for the project. For example, you need to clearly imagine what exactly can be done in a certain time and a certain amount, where you can save, and where you need to save, or spend where you need to spend...

A common feature of the activities of a producer and an entrepreneur is also that they work for themselves. We do not mean a full-time producer, but the head of the production center that produces the project. If the producer is a member of the creative team represented by the record label, his work in this case is similar in form to the work of a manager who is responsible for a certain segment and is responsible to the manager.

Every entrepreneur, when planning and organizing his activities, cannot ignore the consumer's moods, desires, interests, expectations, and assessments. At the same time, the entrepreneur focuses on the tastes of consumers, and the producer takes into account the interests of the audience of the project (spectators, listeners, etc.), that is, the same consumers, but only of the intellectual product. Thus, the goal of the entrepreneur and producer is the need to "conquer" the audience and create a circle of own consumers.

The third important aspect of similarity is the innovative component, which in a production project is expressed in creativity, and in entrepreneurship - in innovative solutions that increase the "product" in the eyes of the public and competitors.

Next, we will consider the "figures" of the producer and manager. The main thing here is the management aspect.

These representatives of show business must organize all processes and create a coherent team by involving all participants in the activity, whether it is a creative group or a staff of subordinate managers. Also common to the producer and manager are the functions of prediction and innovation, which makes them flexible in relation to the external environment.

An equally important quality for a manager and producer is sociability, or simply put, the ability to communicate, place an interlocutor near you and establish the necessary connections with partners, colleagues and subordinates. It is this property, quality that makes up a significant part of the success of such professionals.

Next, we will consider specific features. First, it is necessary to remember that the producer is not a businessman and the main thing in his work is the creative component.

The producer is the author of the project idea. His role is also great in creating the concept of the project, not to mention that the process of this activity requires the producer to have, if not creative education and relevant abilities, then at least artistic taste.

The producer's competence also has its own specifics. So, for example, a music producer must know, first of all, the music market, its laws and "pitfalls", taste preferences of consumers of music products. Of course, you need to know at what price the product is sold in this market, and how to sell it – to expand the network of public relations, the number of broadcasts on music channels or to attract attention with spectacular shows – the creative side of production activity. In the desire to sell your product and make a profit in the conditions of a free market economy, in show business, as in any business, there is an economic competition, a competition called competition.

The main coincidence of the processes of production and entrepreneurship is riskiness. But even in this component there is a certain difference. The entrepreneur risks his own, and the producer often borrowed capital.

A serious risk for a producer is the danger of losing his reputation in business and professional circles, which is his calling card. Dishonesty at work or an accident puts an end to a producer's career, because, as already noted, the circle of professionals in the show industry is very narrow.

Production activity also has significant differences from the work of a manager, whose main component of professionalism consists in leadership. The producer, despite the leading role in the creation and promotion of the project, often recedes into the shadows from the creative plan and gives the artist the opportunity to express himself, which has a beneficial effect on the overall result.

Organizational activity plays a much smaller role in the total volume of work. Here we can note the distinctive function of the manager, which characterizes him as a connecting link. The producer is still more the initiator of the whole "action" than the coordinator.

In our opinion, the main difference between production activity and entrepreneurial and managerial activities is that the producer relies on his intuitive choice in decision-making, the entrepreneur and manager are guided, first of all, by rationality and common sense, for which everyone must possess certain qualities and abilities.

For both a producer and a manager, most authors (and we agree with them) define the following personal qualities: charisma, ambition, attractiveness, optimism, honesty, self-confidence, high morality, sober thinking, self-control.

Along with personal qualities, researchers highlight the business qualities of a producer and manager. The majority of authors refer to them as: mobility, imagination, calculation, competence.

And finally, the quality is professional. Among these requirements, the main ones are: creativity, intuition, leadership, knowledge of the market, perseverance.

Conclusions. We can draw the main conclusion that, as can be seen from the totality of the given data, the main component of the producer is creative, which affects the totality of his personal, professional and business qualities.

It is on such a basis that a complex model of a producer as a professional can be defined and a rating scale of professional values and their importance for evaluating working producers, recommendations regarding selection and professional training can be compiled.

Summarizing the results of the study of the institutes of production and management in the context of modern entrepreneurship, it is possible to once again emphasize the dominance of the creative component in the activity of the producer, even with the all-round importance of the economic and managerial aspects of such a specific activity.

REFERENCES:

- Vyshynska, O. O. (2020). Prodiusuvannia shchou-prohram [Production of show-programs]. URL: elibrary.Kubg.edu.ua [in Ukrainian].
- Diialnist prodiusera v kulturno-mystetskomu prostori KhKhI stolittia [Activity of the producer in the cultural and artistic space of the 21st century]. Kyiv. 2011 [in Ukrainian].
- Diialnist prodiusera v kulturno-mystetskomu prostori KhKhI stolittia [Activity of the producer in the cultural and artistic space of the 21st century]. Kyiv. 2014 [in Ukrainian].
- Zhdanova, E. I. (2003). Upravlinnia ta ekonomika v shou-biznesi [Control and economy in show-business]. Kyiv [in Ukrainian].
- Moskalenko-Vysotska, O. M. (2019). Osnovy prodiuserskoi diialnosti [Basics production activity]. Kyiv [in Ukrainian].
- Langley, S. (2000). Teatralnyi menedzhment i prodiuserstvo. Amerykanskyy dosvid [Theatrical management. American experience]. Kyiv [in Ukrainian].
- Otkydach, V. M. (2011). Prodiuser yak diiova osoba shou-biznesu [Producer how acting person in show-business]. *Visnyk KhDADM = Messenger XDADM* [in Ukrainian].
- Polkulyta, I., Polshovsky, A. (2014). Muzychnyi prodiuser yak subiekt tvorchosti: zmist diialnosti ta sotsiokulturni naslidky [Musical producer how subject of creativity: content activity]. *Visnyk NTUU "KPI". Filosofiia. Psykholohiia. Pedahohika = Messenger NTUU "KPI". Philosophy. Psychology. Pedagogy*, Vol. 2 [in Ukrainian].
- Chekalyuk, V. (2012). Osnovy prodiuserskoi diialnosti [Basics production activity]. Kyiv: RHP, IMB NAU [in Ukrainian].

AUTHOR (S) BIOSKETCHES



Matias Serhii, Candidate Philosophy Sciences, Teacher Department of Performing Arts and Culture, Faculty of Cultural and Creative Industries, Kyiv National University of Technologies and Design, Ukraine

<https://orcid.org/0000-0001-5848-1757>

Scopus Author ID: 36175765200

Researcher ID: JQV-4057-2023

E-mail: svmatyash@gmail.com

COPYRIGHTS

©2023 The author(s). This is an open access article distributed under the terms of the Creative Commons Attribution (CC BY 4.0), which permits unrestricted use, distribution, and reproduction in any medium, as long as the original authors and source are cited. No permission is required from the authors or the publishers.

HOW TO CITE THIS ARTICLE

Matias, S. (2023). Production activity as management in the socio-cultural sphere. *Management*, 2(38): 22–30. <https://doi.org/10.30857/2415-3206.2023.2.2>.

JEL Classification:
Z32

UDC 339.924/
137(477)

DOI: 10.30857/2415-
3206.2023.2.3

MANAGEMENT OF THE INNOVATIVE PROVISIONING PROCESS QUALITY OF TOURIST AND HOTEL-RESTAURANT BUSINESS SERVICES

Olena STEPANOVA¹, Oleksii TONKYKH¹

¹*Kyiv National University of Technologies and
Design, Ukraine*

PRESENTATION AND PURPOSE OF THE STUDY. At the current stage of recovery of the national economy of Ukraine, it is impossible to form a concept of ensuring innovative development, to achieve long-term results of the tourism and hotel-restaurant business without constant updating and improvement of applied technological and management processes, constant expansion of the range of services provided, and identification of new opportunities for effective development. Scientific and technical progress, the creation of new innovative management technologies, the development of innovative production infrastructure, including changes in consumer preferences, new methods of management and organization of production and work should be attributed to the reasons that cause the need for innovative processes. Innovations (or innovations) play the most important role in macroeconomic development and in achieving the goals of tourism and hotel and restaurant business. To date, there is not a high level of innovative activity in the field of tourism and hotel-restaurant business, which is due to the need to find solutions for improving control in the field of management of innovative activities of tourist and hotel-restaurant enterprises. The development of market relations causes the emergence of new tasks that require the improvement of the system management of the quality of services at tourist and hotel-restaurant enterprises.

The above-mentioned words prove the relevance of this article and reflect its purpose as a study of the peculiarities of managing the innovative process of improving the quality of various services of the tourist and hotel-restaurant business.

RESEARCH METHODS. In the process of creating and writing the article, general and scientific methods were used: abstraction, classification

of various types, comparison, systemic and system-forming approach, situational mathematical analysis, logical and analytical evaluation of parameters, analogies, modeling. The totality of the used theoretical and methodological base made it possible to formulate realistic and well-founded practical conclusions and effective solutions.

THE RESULTS. It was emphasized that the development of innovations in the hospitality industry should include such aspects as automation and improvement of work processes with the help of the Internet of Things, the use of "smart" solutions, as well as the improvement of safety and hygiene through innovative solutions. Innovative processes in the tourism and hotel-restaurant business are described, which should include the introduction of new ideas, technologies, services or approaches to improve service quality and competitiveness. This may include the implementation of information systems, the creation of unique numbers or services, the development of an environmental initiative, etc.

CONCLUSIONS. Innovative activity in the tourism and hotel-restaurant business is embodied in the creation of new or improvement of transport, hotel, restaurant and other services, the development of new national and international markets, the use of advanced information and telecommunication innovative technologies, modern advanced forms of organizational, planning and management activities, new ways to meet the needs of tourists, etc. Carefully selected tools for the innovative development of tourism and hotel-restaurant business enterprises ensure its competitiveness.

KEYWORDS: tourism and hotel and restaurant business; quality of services; innovations; communications; management; service; digital technologies; Internet of things; blockchain.

NUMBER OF REFERENCES	NUMBER OF FIGURES	NUMBER OF TABLES
10	0	0

JEL Classification:
Z32

УДК 339.924/
137(477)

DOI: 10.30857/2415-
3206.2023.2.3

УПРАВЛІННЯ ІННОВАЦІЙНИМ ПРОЦЕСОМ ЗАБЕЗПЕЧЕННЯ ЯКОСТІ ПОСЛУГ ТУРИСТИЧНОГО ТА ГОТЕЛЬНО- РЕСТОРАННОГО БІЗНЕСУ

Олена СТЕПАНОВА¹, Олексій ТОНКИХ¹

¹ *Київський національний університет технологій
та дизайну, Київ, Україна*

ВСТУП І МЕТА ДОСЛІДЖЕННЯ. На сучасному етапі відновлення економіки України концепція інноваційного розвитку, досягнення довгострокових результатів туристичного та готельно-ресторанного бізнесу неможливо без постійного оновлення та вдосконалення, застосовуваних технологічних, управлінських процесів, постійного розширення асортименту послуг, що надаються, і пошуку нових ринкових можливостей для успішного розвитку. До факторів, що викликають необхідність здійснення інноваційних процесів необхідно відносити науково-технічний прогрес, створення нових технологій, розвиток виробничої інфраструктури, в тому числі і зміна переваг споживачів, нових методів управління та організації виробництва та праці. Інновації (чи нововведення) відіграють найважливішу роль у макроекономічному розвитку, та у досягненні цілей діяльності туристичного та готельно-ресторанного бізнесу. На сьогоднішній день у сфері туристичного та готельно-ресторанного бізнесу спостерігається низький рівень інноваційної активності, що обумовлюється необхідністю пошуку рішень щодо вдосконалення контролю у сфері управління інноваційними процесами у діяльності туристичних та готельно-ресторанних підприємств. Розвиток ринкових відносин викликає появу нових завдань, що викликаються необхідністю вдосконалення системи управління якістю туристичних та готельно-ресторанних послуг.

Вищезазначене окреслює актуальність даного дослідження та відображає мету даної статті як вивчення особливостей управління інноваційним процесом забезпечення якості послуг туристичного та готельно-ресторанного бізнесу.

МЕТОДИ ДОСЛІДЖЕННЯ. У процесі написання статті застосовувалися загально-наукові методи: абстракція, класифікація видів,

порівняння, системний підхід, ситуаційний математичний аналіз, логіко-аналітична оцінка параметрів, аналогії, моделювання. Сукупність використовуваної методологічної бази дозволила забезпечити зрештою достовірність і обґрунтованість висновків та практичних рішень.

РЕЗУЛЬТАТИ. Наголошено, що розвиток інновацій в індустрії гостинності повинен включаючи такі аспекти, як автоматизація та поліпшення робочих процесів за допомогою Інтернету речей, використання «розумних» рішень, а також підвищення безпеки і гігієни через інноваційні рішення. Описано інноваційні процеси у туристичному та готельно-ресторанному бізнесі, які повинні включати в себе впровадження нових ідей, технологій, послуг або підходів для поліпшення якості обслуговування та конкурентоспроможності. Це може охоплювати впровадження інформаційних систем, створення унікальних номерів чи послуг, розвиток екологічної ініціативи тощо.

ВИСНОВКИ. Інноваційна діяльність у туристичному та готельно-ресторанному бізнесі втілюється у створенні нових або вдосконаленні транспортних, готельних, ресторанних та інших послуг, освоєнні нових ринків, упровадженні провідних інформаційних і телекомунікаційних технологій, сучасних форм організаційно-управлінської діяльності, нових підходів до задоволення потреби туристів тощо. Ретельно підібрані інструменти інноваційного розвитку підприємств туристичного та готельно-ресторанного бізнесу забезпечують його конкурентоспроможність.

КЛЮЧОВІ СЛОВА: туристичний та готельно-ресторанний бізнес; якість послуг; інновації; комунікації; менеджмент; сервіс; цифрові технології; інтернет речей; блокчейн.

Introduction. Quality is determined by the influence of a large number of known and random factors in the tourism and hotel-restaurant business. To prevent possible effects of these factors on the quality level, a quality management system and innovative solutions for its organization are necessary. A set of measures of constant impact on the process is needed in order to maintain the appropriate level of quality. The essence of quality management is the development of management decisions and the subsequent implementation of management actions provided for by these decisions at a specific management facility. In the quality management of direct objects of management, as a rule, there are processes on which the quality of products depends. They are organized and take place both at the pre-production stage and at the production and post-production stages of the product life cycle. Control solutions are developed based on a comparison of specific information about the actual state of the controlled specific process with its characteristics specified by a specific control program. Normative specific regulatory documentation regulating the value of parameters or indicators of product quality (standards) should be considered as a concrete and important part of a clear quality management program for specific products.

The goal of quality management is to achieve an economic effect (profit) and a high level of enterprise competitiveness. Only through the development of an effective quality system in the company, as specified in the international standard of the International Organization for Standardization, can the following requirements for products be met, which must correspond to the field of application, purpose and clearly defined needs; meet consumer requirements; meet the accepted technical conditions and standards; satisfy society's requests; meet environmental protection requirements; to be economically profitable, to bring profit.

Description of the problem. In the tourism and hotel-restaurant business, innovations and innovative processes should form strategic competitive advantages, which is manifested through the provision of additional completely new services or services of higher quality against similar competitors. Each economic unit in the course of its functioning in one way or another carries out both internal and external organizational activities. Both of these types of activities are interdependent, they interact with each other and in some cases are able to complement each other.

Tourist and hotel-restaurant business, belonging to the class of complex systems, has certain properties, and the most important condition for their existence in modern conditions is to ensure their continuous sustainable development. Active innovative activity allows enterprises in this field to occupy leading positions on the market and to obtain the expected high profit at a certain point in time.

In innovative activities, the tourist and hotel-restaurant business relies on the foundation of accumulated knowledge. Innovations in the field of hospitality are influenced by the economic and social situation in the country, legislation, as well as international relations and agreements. The innovative trend in the hospitality industry is manifested through the ability to generate various ideas that can ensure the successful development of the hotel and their implementation. Wide application of new knowledge generates new products, services and technologies. If the hotel does not participate in any innovative process, sooner or later its competitiveness will decrease.

Innovation in the hospitality industry follows the trajectory of service innovation, which is different from product innovation. Such innovations have increased operational efficiency and created great value for customers. As a result of constant innovation, service firms have not only improved the quality of their service, but also offered a more personalized experience. This result was achieved by forecasting customer needs, increasing loyalty with the help of various programs, expanding the customer base while simultaneously reducing unused capacities and increasing the level of productivity. Service innovation involves the constant improvement and optimization of ideas to expand the capabilities of employees, entrepreneurs and consumers. As a result of clear innovations, new specific types of customer experience have appeared (Povorozniuk, 2021).

It is important to recognize that innovation also has barriers, including the ownership structure of the hospitality industry and specific franchise models. Innovation remains a buzzword for many hotels, and the hospitality industry has been slow to adopt new technologies. The cost of specific innovations, resistance from owners, avoidance of change, learning challenges, the pace of advancement of new effective technologies, and time and budget constraints are some of the other insurmountable barriers. In general, an innovative structure in the field of tourism and hotel-restaurant business is an organizational, material, financial, and informational basis for creating conditions that contribute to the effective accumulation and distribution of resources, as well as the provision of high-quality services.

The use of innovations in the tourism and hotel-restaurant business, as well as in any other sector of the economic system, has its own characteristics, which must be taken into account when organizing the choice of tactical and strategic directions of innovative and sustainable development of the enterprise. innovations and innovative developments in the activities of tourist and hotel and restaurant enterprises:

1. The use of innovations helps to increase the demand for tourist and hotel-restaurant products and attracts new customers to the field of tourist and hotel-restaurant services of a more innovatively developed enterprise. In those

hotels that use more innovative information services, the occupancy level of the room stock increases.

2. The adaptation of innovative developments clearly contributes to increasing the specific quality of providing tourist and hotel-restaurant services to clients and maximizing the satisfaction of their consumer requests. An example of a clear application of this type of specific innovation is the use of an operational menu at the hotel reception, which allows you to quickly work out the needs of the client.

3. The introduction of innovations is an important tool for reducing costs for the activities of tourist and hotel-restaurant enterprises, which contributes to increasing the profitability of the commercial activity of the organization (automation of the cleaning process in the rooms of the room fund, which leads to a decrease in labor costs).

The development of tourist and hotel-restaurant enterprises in the conditions of the innovative paradigm has a set of distinctive features. These features are clearly related to the specifics of the organization and management of clear and precise business processes in tourist and hotel-restaurant enterprises (Tyshchenko, 2021).

In the materials of various studies, the peculiarities of the organization of specific innovative activities are considered leading enterprises of the tourist and hotel-restaurant business. First of all, seasonality is highlighted, which leads to the formation of a rather long period of payback of innovations. The adaptation of any innovation has two clear components: firstly, it is aimed at the company achieving the necessary level of commercial success, that is, the profitability of its business and economic activities, and secondly, it is related to the implementation of investments that, based on in essence, must pay off. Return on investment occurs primarily through the formation of a positive value of the financial flow of the tourist and hotel-restaurant enterprise, which is created as a result of the provision of services. The demand for hotel services in most enterprises of this type of commercial activity is seasonal, which is caused by natural and climatic conditions, the periodicity of certain events and other factors. The presence of the seasonality factor "stretches" in time the formation of a positive financial flow of a hotel enterprise, which extends the payback period of investments invested in innovative developments.

The second important feature of the organization of innovative activities in the system of tourism and hotel-restaurant business is the need for immediate satisfaction of the consumer's requests, because he needs to receive the necessary service at this very moment and this service cannot be purchased. In this regard, the introduction of innovations in the tourist and hotel-restaurant business should have an already completed character, that is, the potential

consumer should use the final and tested result of the innovation process in the tourist and hotel-restaurant enterprise.

An essential feature of the introduction of innovations in the activities of tourism and hotel-restaurant business enterprises is rather high commercial risks, which is a specific feature of the realization of a tourist and hotel-restaurant product. The dynamics of the realization of tourist and hotel-restaurant products completely depends on the level of demand for it, which is formed taking into account the specific needs and clear requests of potential consumers. At the same time, the specifics and directions of these requests have a rather turbulent character, which is caused both by subjective changes in the preferences of citizens of one or another country, their national characteristics, and by changes in the attitudes of a certain society. In addition, macroeconomic factors have a significant and clear influence on the dynamics of specific consumer demand for tourist and hotel and restaurant services, among which it is necessary to note primarily monetary factors (in the form of fluctuations in currency rates) and geopolitical factors (in the form of changes in the stability of political relations between individual countries on the international stage).

A significant aspect of the development of tourist and hotel-restaurant enterprises in the conditions of the innovative paradigm is the multifaceted nature of the implementation of innovations. The essence of this feature lies primarily in the fact that the implementation of innovations within the framework of economic activity has a wide range of implementation. In this regard, it is possible to clearly distinguish the exact main directions of implementation of innovative developments in the economic activity of tourist and hotel and restaurant enterprises:

- management innovations, which are primarily aimed at organizing a more effective mechanism for managing the main business processes within the economic and economic activities of tourist and hotel and restaurant enterprises. An example of the use of management innovations is the use of interactive technologies in the interaction of management with personnel;

- communication innovations, which are such innovations that increase the quality, efficiency and sustainability of interaction between producers and consumers of tourist and hotel and restaurant services. An example of the use of communication technologies is the use of certain service devices, which will allow to accumulate requests of service consumers and promptly transfer them to the management of the enterprise;

- service innovations – the use of innovations of this type is aimed at clearly maximizing the satisfaction of the requests of potential consumers of services based on the growth of their quality and a clear expansion of the range of possibilities. As an example of service innovations in the hotel business, we

can consider the use of variable climate control devices that modulate their activity based on the variability of the environment;

- marketing innovations are a type of innovation, the adaptation of which helps to increase the demand for tourist and hotel-restaurant services using various sales promotion tools. An example of the use of clear marketing innovations in the system and at enterprises of the tourist and hotel-restaurant business can be the use of specific WEB services, which, based on the client's prior clear request, form the most profitable and necessary package of hotel services in compliance with the "price-quality" criterion;

- logistic innovations are actively implemented by tourist and hotel and restaurant enterprises to optimize and improve and improve the management of specific material, information, resource and clear human flows within the framework of service provision;

- digital innovations and tools are one of the most widespread types of innovations and innovations in the conditions of globalization, the use and implementation of which increases the level of information and computerization of the offer and provision of tourist and hotel and restaurant services, communication clear interaction of the consumer and the corresponding specific service (Chomiak-Orsa, 2020).

A significant feature of the use of innovations in the activities of the tourist and hotel-restaurant business is the significant dependence on the human factor in the process of their implementation. Since most innovations in tourism and hotel-restaurant enterprises are of a service nature, they are accordingly related to the formation of a certain kind of communication relationships between people. In this regard, when considering the implementation of certain innovations in the company's activities, it is necessary to carry out measures in the field of selecting high-quality personnel and building an innovation-oriented human resources management strategy. The lack of qualified personnel can significantly reduce the quality and efficiency of the implementation of innovations in certain areas of hotel service provision.

The use of innovations in the activities of tourist and hotel-restaurant enterprises is not radical in nature, which continues over time. Taking into account the specifics of tourism and hotel-restaurant product implementation, enterprises of this branch of commercial activity do not use radical innovations in order not to lose regular customers and not to shock them with their innovations. In this regard, the majority of tourist and hotel-restaurant enterprises use the strategy of regular small-scale innovative activity, the essence of which is that they, as a rule, introduce the most relevant innovations into certain aspects of their business and economic activity with seasonal periodicity. This strategy, with a rational approach and high-quality implementation, not only supports the required level of demand for the service, but also leads to its growth.

The relevance of using innovations in the tourist and hotel-restaurant business system can be confirmed by analyzing a number of statistical data. First of all, the actualization of the use of clear innovations in the hotel and additional business is determined by the scale of the tourist flow, that is, the dynamics of the level of demand for hotel services. There are a number of factors that allow us to clearly introduce or slow down the process of introducing new technologies in the tourism and hotel-restaurant industries. First of all, they include: lack of knowledge about "new products"; lack of funds to purchase expensive equipment; lack of qualified personnel; high risks; lack of interest of management in implementing new technologies.

It is these factors that lead to a lack of innovation in the tourism and hotel-restaurant industry. What negatively affects the development of domestic tourism. Over time, this leads to a decrease in income from the tourism sector in general.

The implementation of innovations is one of the most important areas of ensuring clear competitiveness of the tourism and hotel-restaurant business, many hotels are in no hurry to apply new technologies, because they face such problems:

1. Lack of knowledge about the emergence of new technologies. In most hotels, especially in chain hotels, there is no position of a specialist responsible for monitoring and implementing clear innovations on the part of the enterprise. The absence of such an official does not allow most hotels to find out that new products have appeared. In general, nowadays there are not so many specialists who understand innovations and their implementation in the tourist and hotel and restaurant business.

2. Lack of funds and resources for the purchase of innovations. Many innovative technologies cost money, which small hotel enterprises are unable to pay. It is not always possible to receive state grants and subsidies. Especially if they are not part of the priority area.

3. Difficulty attracting investments. The main attractiveness of any project for investors is related to its quick payback and high profit. However, when implementing innovations, the investment payback period will increase, and the profit obtained from this is not direct, but indirect, since they usually do not have a direct impact, but only reduce the cost of the enterprise. Because of this, investors are reluctant to invest in these projects, because the existing system of service activities actually suits the majority of tourism-oriented enterprises.

4. High risks. Any innovative project has a high risk, because it is not known what the result will be. There are many factors that discourage the implementation and development of innovations, such as low profitability, loss of consumer loyalty, and others.

5. Management's unwillingness to adopt new technologies. Most managers of tourism and hotel-restaurant enterprises believe that there is no clear need to

invest in little-known projects, since the hotel receives a stable profit, and innovations require costs that may not pay off. Also, with the specific implementation of new clear technologies, a certain amount of time and money will be needed to adapt specific personnel to the innovations (Tabenska, 2019).

It should be understood that the current innovations will become natural elements of the tourist and hotel-restaurant business in the coming years. By introducing innovative ideas now, you can increase profits, brand recognition, and consumer loyalty.

When analyzing the impact of new technologies on the economy of the enterprise, indicators are taken as a basis before the implementation of the innovative project, and then a comparative analysis is carried out based on calculations and comparison of indicators after the introduction of innovations. The system of calculated values should not be complex, otherwise its use will require a huge amount of time to collect the information necessary for the calculation. When evaluating the company's activity, a balanced system of calculated values should be used, taking into account the specific clear aspects most important for the company: finances, partners, customers and consumers, internal clear business processes, training and effective development of personnel. In many companies, innovation is considered as a project. In the literature, there is also a widespread approach according to which innovation is identified with projects. And their efficiency is evaluated on the basis of investment project evaluation indicators. However, innovation cannot be equated with projects, as they are rather a continuous process of generating, developing and selecting new ideas, resulting in new projects. Innovative ideas are the basis for the emergence of new products and improvements, so it is incorrect to use only a system of indicators to evaluate investment projects in this case.

At the stage of generation and selection of ideas, it is advisable to calculate the following indicators: the number of innovative products brought to the market by the company over the last year; the number of innovative ideas developed by the company's staff over the past year; the share of customers who consider the enterprise completely innovative, to the total clear number of different consumers of the given enterprise.

At the stage of design, development, testing of a new product within the organization and launch into production: profitability of innovations; the share of implemented innovative ideas in the total number of proposed ones; the time elapsed from the development of a new idea to the start of the project.

At the stage of commercialization of innovations and the creation of distribution networks and the organization of mass sales and after-sales service, the following are calculated: an increase in intangible assets; increase in net

profit; increase in sales revenue; increase in the number of customers; the ratio of revenue from innovative activities to total profit for the past year.

Because market analysis data quickly becomes outdated, the data should be updated approximately once every quarter. It is also necessary to constantly monitor the competitiveness of the product being developed, and at each stage make a decision: to continue working on this product, to postpone it for a while or not to return to its development. Sometimes suspending or stopping work on a project can prevent the loss of significant financial investments.

Performance indicators are not the same for different spheres of activity. Moreover, the choice of one or another indicator depends on many factors, both internal and external in relation to a specific company.

The method of assessing the impact of innovative activity on the economy of the enterprise is systematically related to the effectiveness of attracting qualitatively new and improved products into the system of economic circulation. It allows you to evaluate the changes that will take place at the enterprise after the introduction of the innovation, taking into account the established initial parameters (product potential, market segments).

Innovations are evaluated according to the degree of their market prospects, economic feasibility, investment efficiency and impact on the sustainable development of the economy of a particular enterprise as a whole. The calculation of the proposed indicators will allow to determine and find out how qualitatively the new product is attractive for the enterprise.

However, it is important that performance indicators are linked to its innovation goals and serve as a monitoring tool at all key stages of innovation activity.

When evaluating the effectiveness of innovations, it is important to prioritize the process of choosing the best option among possible alternatives, in contrast to evaluating the effectiveness of investments. When choosing the optimal option, attention should be paid not only to time factors, but also to the volume of production of new products (works) and quality aspects, including social and environmental indicators.

During the formation of the portfolio of research works, taking into account the indicators of the best technology that can be purchased or created in Ukraine or purchased abroad, or developed on the basis of a license in the country.

When forming plans for the implementation of innovations, considering the indicators of alternative (analogous) technology.

During the technical and mathematical-economic substantiation of a clear choice of the best option, both the state approach and the approach that takes into account the interests of producers and investors of the project should be followed. This includes: assessment of efficiency with partial consideration of adjacent positive, neutral and negative consequences in other specific areas of

the economy, such as social, production, environmental and foreign economic; calculation of clear economic efficiency at specific different stages of the life cycle of identified innovations; viko the creation of a system of clear economic standards, including various expenses, taxation, specific land payments, insurance of many risks, settlements with specific banks for loans and other standards; the calculation of certain indicators of national efficiency, which clearly take into account the impact of specific innovations on state interests through an effective system of taxes and fees, as well as the interests of specific producers and specific consumers (Shanker, 2021).

When evaluating the effectiveness of innovations, the costs and revenues received before the accounting year must be adjusted by the income growth factor, and after the end of the accounting year – by the discount factor. Bringing various costs to the accounting year is carried out only when determining indicative performance indicators for making a decision on the feasibility of implementing innovations.

Methods of evaluating the effectiveness of innovations must take into account the state interests, the interests of creators, producers, consumers and budgets.

In addition, the methods of evaluating the effectiveness of innovations should include integral indicators that allow not only to evaluate the overall effect of implementation, but also to determine the contribution of each participant of the investment activity. Methods for evaluating the effectiveness of innovations must clearly take into account the specific interests of both investors and producers of innovations.

Summing up, it should be noted that hotel enterprises need to constantly improve their innovative activities, not forgetting the existence of the concept of benchmarking.

At the next stage, we will consider in more detail the innovative tool of digital technologies – blockchain.

Blockchain is a decentralized data storage system that consists of consecutive blocks that contain information about transactions, information about their confirmation and other data. Each specific block contains the exact hash value of the specific previous block, which ensures the immutability of the chain. All blocks are stored on specific computers of exact network members or other servers, which clearly guarantees their safety and reliability.

Blockchain can be applied in a specific hotel, restaurant and tourism business for various purposes. For example, it can be used to save information about hotel reservations, restaurants and other services provided to tourists. This allows you to ensure the security and integrity of data, which is especially important in the conditions of the growing number of cyber attacks.

In addition, blockchain can be used to secure the exchange of travel information, such as passports, tickets, visas, and other travel documents. Blockchain can help reduce travel fraud as the system stores information about all transactions and user actions.

Another important area of application of blockchain technology in the hotel, restaurant and tourism business is ensuring the security of payments and customer data. Blockchain provides a high level of cryptographic data protection, making it an ideal tool for securing payments and sharing confidential information from customers.

For example, some hotels are using blockchain to create secure e-wallets for guests where they can store their digital assets (funds) and program loyalty. This allows customers to make fast and secure payments, reduces transaction costs and provides protection against theft.

In addition to security and data storage, blockchain can also help manage the customer service process. For example, blockchain can be used to create digital profiles of customers that contain information about their preferences, habits and other characteristics. This can help hotels and restaurants provide personalized service.

The next advantage of blockchain technologies – financial blockchains – focuses on the use of blockchain technology in financial areas, in particular for settlements and transfers of funds. Financial blockchains are decentralized, meaning they do not require intermediaries to carry out financial transactions, such as banks or payment systems. This can significantly reduce the costs of money transfer operations, as well as reduce the time for their implementation.

The next benefit of blockchain is smart contracts – they focus on using blockchain technology to automate the execution of contracts. Smart contracts are programs that can perform functions provided in contracts between parties automatically. Blockchain for smart contracts can ensure the security of contract execution, as the execution of the contract is controlled by a decentralized network, and also ensure the speed of contract execution.

Another advantage of the blockchain system is property registration blockchains – they use blockchain technology to store and share property information. Blockchain can ensure the security of property information storage as it provides decentralized data storage, as well as enable quick and efficient exchange of property information.

Research results and prospects. The use of innovations in the hotel business, as in any other sector of the economic system, has its own specific features that must be accurately taken into account when choosing the specific tactical and strategic directions of innovative development of a hotel enterprise. developments in the activities of hotel enterprises:

1. The use of innovations helps to increase the demand for the hotel product and attracts new customers to the hotel service sphere of a more innovatively developed enterprise. In those specific hotels that really use more innovative information services, the occupancy level of the room stock increases.

2. Adaptation of innovative developments helps to improve the quality of providing hotel services to clients and maximize the satisfaction of their consumer requests. An example of a specific application of this specific type of innovation is the use of an operational menu at the hotel reception, which allows you to quickly work out the needs of the client.

3. The introduction of innovations is an important tool for reducing the costs of the hotel enterprise, which helps to increase the profitability of the commercial activity of the organization (automation of the cleaning process in the rooms of the room fund, which leads to a decrease in labor costs).

The development of a sustainable hotel business in the conditions of a clear innovation paradigm has a set of distinctive features. These features are primarily related to the specifics of the organization and management of business processes in hotel enterprises. The materials of various studies consider the peculiarities of the organization of specific innovative activities at certain enterprises of the hotel business. First of all, they highlight seasonality, which leads to the formation of a rather long period of payback of innovations. The adaptation of any innovation has two components: firstly, it is clearly aimed at a certain enterprise achieving the necessary level of commercial success, that is, the profitability of its economic and clear activity, and secondly, it is related to the accurate implementation of investments that based on their essence, must pay off. Return on investment occurs primarily through the formation of a positive value of the financial flow of the hotel enterprise, which is created as a result of the provision of hotel services. The demand for hotel services in most enterprises of this type of commercial activity is seasonal, which is caused by natural and climatic conditions, the periodicity of certain events and other factors. The presence of the seasonality factor "stretches" in time the formation of a positive financial flow of a hotel enterprise, which extends the payback period of investments invested in innovative developments.

The second important feature of the organization of innovative activities in the hotel business system is the need for immediate satisfaction of the consumer's requests, because he needs to receive the necessary service at this very moment and this hotel service cannot be purchased. In this regard, the introduction of innovations into the hotel business should have an already finished character, that is, the potential consumer should use the final and tested result of the innovation process in the hotel enterprise.

An essential feature of the introduction of innovations into the activities of hotel business enterprises are rather high commercial risks, which are specific to the implementation of a hotel product. The dynamics of the realization of a hotel product depends entirely on the level of its demand, which is formed taking into account the needs and requests of potential specific consumers. At the same time, the exact specifics and directions of these requests have a rather turbulent nature, which is caused both by subjective changes in the preferences of citizens of one or another country, their national characteristics, and by changes in the mood of a certain society. In addition, macro-economic specific factors have a significant impact on the dynamics of clear consumer demand for hotel services, among which it is necessary to note primarily monetary (in the form of currency exchange rate fluctuations) and geopolitical (in the form of changes in the stability of political relations between individual countries in the international arena).

A significant aspect of the development of the hotel business in the conditions of a clear innovation paradigm is the multifaceted nature of the implementation of innovations. The essence of this feature lies primarily in the fact that the clear implementation of specific innovations within the economic and economic activity of a hotel enterprise has a wide range of implementation. It is possible to single out the main clear directions for the implementation of innovative developments in the economic activity of a hotel enterprise:

- management innovations, which are primarily aimed at organizing a more effective mechanism for managing the main business processes within the economic and economic activities of the hotel enterprise. An example of the use of management innovations is the use of interactive technologies in the interaction of hotel management with its staff;

- communication innovations, which are such innovations that increase the quality, efficiency and stability of interaction between producers and consumers of hotel services. An example of the use of communication technologies is the use of certain service devices that will allow to accumulate requests from consumers of hotel services and promptly transfer them to the hotel management;

- service innovations – the use of innovations of this type is aimed at maximizing the satisfaction of the requests of potential consumers of hotel services based on the growth of their quality and the expansion of the range of possibilities. As an example of service innovations in the hotel business, we can consider the use of variable climate control devices that modulate their activity based on the variability of the environment;

- marketing innovations are a type of innovation, the adaptation of which helps to increase the demand for hotel services using various sales promotion tools. An example of the use of marketing innovations in the hotel business

system can be the use of WEB-services, which, based on the client's prior request, form the most advantageous package of hotel services for him in compliance with the "price-quality" criterion;

- logistic innovations are implemented by hotel enterprises to optimize and improve the management of material, information, resource and human flows within the framework of providing hotel services. As an example of logistics innovations, we can consider the creation of a complex of hotel capsules inside airports;

- information innovations are one of the most common types of innovations in specific conditions worldwide globalization, the use of which increases the level of information and computerization of the provision of hotel services, communication interaction of the consumer and hotel service. An example of the use of information innovations can be the use of special infrared sensors that give the hotel staff an idea of the presence or absence of a client in the room.

A significant feature of the specific use of clear innovations in the activities of hotel business enterprises is the significant dependence on the human factor in the process of their implementation. Since most of the innovations in hotel enterprises have a service nature, accordingly they are connected with the formation of a certain kind of communication relationships between people. In this regard, when considering the implementation of certain innovations in the operation of a hotel enterprise, it is necessary to carry out measures in the field of recruiting high-quality personnel and building an innovation-oriented human resources management strategy. The lack of competent and qualified personnel in the hotel enterprise can significantly reduce the quality and efficiency of the implementation of innovations in certain directions of providing hotel services.

The use of innovations in the operation of a hotel enterprise is not of a radical nature, which is continuous over time. Taking into account the specifics of hotel product implementation, companies in this field of commercial activity do not use radical innovations in order not to lose regular customers and not to shock them with their innovations. In this regard, the majority of hotel enterprises use the strategy of regular small-scale innovative activity, the essence of which is that they, as a rule, seasonally introduce the most relevant innovations into certain aspects of their economic activity. This strategy, with a competent approach and high-quality implementation, provides support for the necessary level of demand for hotel services, and also leads to its growth.

REFERENCES:

Chomiak-Orsa, I., Liszczyk, K. (2020). Digital marketing as a digital revolution in marketing communication. *Informatyka Ekonomiczna = BusinessInformatics*, 2(56), 9–19. <http://dx.doi.org/10.15611/ie.2020.2.01>.

Kvitka, A., Kramarenko, A., Davydov, D., Pasmor, M., Diachek, O. (2021). Digital Business Research for Small and Medium-sized Enterprises: The Case of Ukraine. *Problems and Perspectives in Management*, 19(1), 177–184. [http://dx.doi.org/10.21511/ppm.19\(1\).2021.15](http://dx.doi.org/10.21511/ppm.19(1).2021.15).

Park, J. (2021). Culture Learning in a Daily Space of Kitchen: the Case of Korean Digital Kitchen. *Smart Learning Environments*, 8(32). <http://dx.doi.org/10.1186/s40561-021-00178-3>.

Povorozniuk, I. M. (2021). Innovatsiini tekhnolohii v restorannomu biznesi [Innovative technologies in restaurant business]. *Economy and Society*, 30. <https://doi.org/10.32782/2524-0072/2021-30-17> [in Ukrainian].

Pysarenko, T. V., Kvasha, T. K. et al. (2019). Stan innovatsiinoi diialnosti ta diialnosti u sferi transferu tekhnolohii v Ukraini u 2018 rotsi: analitychna dovidka [The state of innovation and activity in the field of technology transfer in Ukraine in 2018: analytical reference]. Kyiv: UkrINTEI. 80 p. [in Ukrainian].

Saveetha, D., Maragatham, Dr. G. (2021). Online Customer Reviews of a Restaurant Using Blockchain. *Vebology*, 18, 269–277. <http://dx.doi.org/10.14704/WEB/V18SI02/WEB18071>.

Shanker, S., Sharma, H., Barve, A. (2021). Assessment of Risks Associated With Third-party Logistics in Restaurant Supply Chain. *Benchmarking: An International Journal*, 28(8), 2432–2464. <http://dx.doi.org/10.1108/bij-06-2020-0343>.

State Finance Institution for Innovations (2020, September 17). Tekhnolohii ta innovatsii, yaki zminiuiut restorannyi biznes [Technologies and innovations that are changing the restaurant business]. URL: <https://sfii.gov.ua/tehnologii-ta-innovacii-yaki-zminjujut-restorannij-biznes/> [in Ukrainian].

Tabenska O. I. (2019). Innovatsiini tendentsii rozvytku restorannoho biznesu [Innovative Trends in the Restaurant Business]. *Economics. Finance. Law*, 1, 31–34 [in Ukrainian].

Tyshchenko, S. V. (2021). Tsyfrovi tekhnolohii v industrii hostynnosti [Digital technologies in the hospitality industry]. *Taurida Scientific Herald. Series: Economics*, 7, 131–139. <https://doi.org/10.32851/2708-0366/2021.7.16> [in Ukrainian].

AUTHOR (S) BIOSKETCHES



Stepanova Olena, Doctor of Cultural Studies, Professor, Head of the Department of Tourism, Hotel and Restaurant Business, Kyiv National University of Technologies and Design, Ukraine.

<https://orcid.org/0000-0003-4985-0359>

E-mail: stepanova.o@kntud.edu.ua



Tonkykh Oleksii, PhD in Economics, Associate Professor of the Department of Tourism, Hotel and Restaurant Business, Kyiv National University of Technologies and Design, Ukraine.

<https://orcid.org/0000-0001-7823-4761>

Scopus Author ID: 57989621900

ResearcherID: GYU-7075-2022

E-mail: 1402at@gmail.com

COPYRIGHTS

©2023 The author(s). This is an open access article distributed under the terms of the Creative Commons Attribution (CC BY 4.0), which permits unrestricted use, distribution, and reproduction in any medium, as long as the original authors and source are cited. No permission is required from the authors or the publishers.

HOW TO CITE THIS ARTICLE

Stepanova, O., Tonkykh, O. (2023). Management of the innovative provisioning process quality of tourist and hotel-restaurant business services. *Management*, 2(38): 31–47. <https://doi.org/10.30857/2415-3206.2023.2.3>.

JEL Classification:
L83, Z32

UDC 338.48

DOI: 10.30857/
2415-3206.
2023.2.4

INTEGRATIVE APPROACH AND CLUSTERIZATION AS ELEMENTS OF EFFECTIVE TOURISM INDUSTRY MANAGEMENT IN THE CONDITIONS OF SUSTAINABLE DEVELOPMENT

Oleksandra OLSHANSKA¹, Polina PUZYROVA¹,
Oleg SHEVCHENKO¹

¹ Kyiv National University of Technologies and Design, Ukraine

THE PURPOSE OF THE SCIENTIFIC ARTICLE is to study the meaning and application of effective management of the tourism industry in the context of sustainable development using an integration approach and clustering.

RESEARCH METHODS. The article used such scientific general economic methods as the method of grouping and classification, the method of structural and logical analysis, the graphical and tabular method, etc.

PRESENTING MAIN MATERIAL. The integration approach and clustering acquire key features as elements of management of the tourism industry in the conditions of sustainable development, where the integration of various sectors, such as the hotel business, transport, cultural events and others, create a comprehensive and balanced tourism product. Clustering allows combining similar regions or services for joint development. Application of these approaches will improve competitiveness and ensure effective use of tourism potential. An integrative approach to the management and development of the tourism industry can be a powerful tool for creating a holistic and effective environment. This means the joint action of various stakeholders, such as government bodies, local communities, businesses, and even non-profit organizations. Clustering of tourism development contributes to the effective use of resources, increasing competitiveness and creating a sustainable tourist destination. An integrative approach to the management and development of the tourism industry consists in close cooperation of various stakeholders and sectors, as well as in taking into account the interrelationships between various aspects of tourism. Key elements of the integration approach in the tourism industry include: industry integration; local integration; technological integration; cultural integration; sustainability and responsible tourism. The peculiarity of tourist clusters is that they contribute to increasing the attractiveness of the region for tourists, increase the quality and variety of tourist services, and contribute to the growth of the economy and the

creation of new jobs. In Ukraine, the concept of an integrative approach to the management and development of the tourism industry is key to creating a sustainable and competitive tourism system.

CONCLUSIONS. Because of the study, it was found that the integration approach and clustering could be key elements of effective management of the tourism industry in terms of sustainable development. It has been established that an integrative approach involves cooperation between different stakeholders in the industry to achieve common sustainable development goals, which may include the exchange of information, resources and joint projects. It has been proven that clustering can help to group tourism enterprises and regions according to common characteristics or goals, which contributes to more effective management of resources, development of joint marketing strategies and increased competitiveness. It has been established that together these approaches can contribute to the creation of a more sustainable and efficient tourism industry, contributing to economic growth and the preservation of natural and cultural resources. It has been proven that the concept of an integrative approach to the management and development of the tourism industry of Ukraine includes a number of key aspects that contribute to the joint activities of various interested parties, namely: strategic planning; creation of tourist clusters; infrastructure development; marketing and promotion; education and training; protection of nature and cultural heritage; public participation; monitoring and evaluation. It has been established that the integration approach and clustering as elements of effective management of the tourism industry in conditions of sustainable development require close cooperation between government bodies, business, the public and other parties in order to create an integrated and sustainable tourism system in Ukraine.

KEYWORDS: integration approach; clustering; effective management; tourism industry; sustainable development; tourism product; competitiveness; tourism potential; tourism cluster; concept; tourism system.

NUMBER OF REFERENCES	NUMBER OF FIGURES	NUMBER OF TABLES
25	2	2

JEL Classification:
L83, Z32

УДК 338.48

DOI: 10.30857/
2415-3206.
2023.2.4

ІНТЕГРАЦІЙНИЙ ПІДХІД ТА КЛАСТЕРИЗАЦІЯ ЯК ЕЛЕМЕНТИ ЕФЕКТИВНОГО УПРАВЛІННЯ ТУРИСТИЧНОЮ ГАЛУЗЗЮ В УМОВАХ СТАЛОГО РОЗВИТКУ

Олександра ОЛЬШАНСЬКА¹, Поліна ПУЗИРЬОВА¹,
Олег ШЕВЧЕНКО¹

¹Київський національний університет технологій та дизайну, Україна

МЕТОЮ НАУКОВОЇ СТАТТІ є дослідження значення та застосування ефективного управління туристичною галуззю в умовах сталого розвитку за допомогою інтеграційного підходу та кластеризації. **МЕТОДИ ДОСЛІДЖЕННЯ.** В статті було використано такі наукові загальноекономічні методи як: метод групування та класифікації, метод структурно-логічного аналізу графічно-табличний метод та ін.

ВИКЛАД ОСНОВНОГО МАТЕРІАЛУ. Інтеграційний підхід та кластеризація набувають ключових ознак як елементів управління туристичною галуззю в умовах сталого розвитку, де інтеграція різних секторів, таких як готельний бізнес, транспорт, культурні заходи та інші, створюють комплексний та збалансований туристичний продукт. Кластеризація дозволяє об'єднати подібні регіони чи послуги для спільного розвитку. Застосування цих підходів дозволить покращити конкурентоспроможність та забезпечити ефективне використання туристичного потенціалу. Інтеграційний підхід до управління та розвитку туристичною галуззю може бути потужним інструментом для створення цілісного та ефективного середовища. Це означає спільну дію різних стейкхолдерів, таких як урядові органи, місцеві громади, підприємства, та навіть неприбуткові організації. Кластеризація туристичного розвитку сприяє ефективному використанню ресурсів, підвищенню конкурентоспроможності та створенню сталого туристичного напрямку. Інтеграційний підхід до управління та розвитку туристичною галуззю полягає в тісному співробітництві різних зацікавлених сторін і секторів, а також у врахуванні взаємозв'язків між різними аспектами туризму. До ключових елементів інтеграційного підходу в туристичній галузі відносять: галузеву інтеграцію; локальну інтеграцію; технологічну інтеграцію; культурну інтеграцію; сталість та відповідальний туризм. Особливість туристичних кластерів полягає в тому, що вони сприяють збільшенню привабливості регіону для туристів, підвищують якість та різноманітність туристичних послуг, а також сприяють зростанню економіки та

створенню нових робочих місць. В Україні концепція інтеграційного підходу до управління та розвитку туристичної галузі є ключовою для створення стійкої та конкурентоспроможної туристичної системи.

ВИСНОВКИ. В результаті дослідження було з'ясовано, що інтеграційний підхід та кластеризація можуть бути ключовими елементами ефективного управління туристичною галуззю в умовах сталого розвитку. Встановлено, що інтеграційний підхід передбачає співпрацю між різними стейкхолдерами в галузі для досягнення спільних цілей сталого розвитку, що може включати обмін інформацією, ресурсами та спільними проектами. Доведено, що кластеризація може допомогти групувати туристичні підприємства та регіони за спільними характеристиками чи цілями, що сприяє ефективнішому управлінню ресурсами, розвитку спільних маркетингових стратегій та збільшенню конкурентоспроможності. Встановлено, що разом ці підходи можуть сприяти створенню більш стійкої та ефективної туристичної галузі, сприяючи економічному зростанню та збереженню природних та культурних ресурсів. Доведено, що концепція інтеграційного підходу до управління та розвитку туристичної галузі України включає ряд ключових аспектів, які сприяють спільній діяльності різних зацікавлених сторін, а саме: стратегічне планування; створення туристичних кластерів; розвиток інфраструктури; маркетинг і просування; освіта та навчання; захист природи та культурної спадщини; участь громадськості; моніторинг та оцінка. Встановлено, що інтеграційний підхід та кластеризація як елементи ефективного управління туристичною галуззю в умовах сталого розвитку передбачають тісну співпрацю між урядовими органами, бізнесом, громадськістю та іншими сторонами з метою створення інтегрованої та сталої туристичної системи в Україні.

КЛЮЧОВІ СЛОВА: інтеграційний підхід; кластеризація; ефективне управління; туристична галузь; сталий розвиток; туристичний продукт; конкурентоспроможність; туристичний потенціал; туристичний кластер; концепція; туристична система.

Statement of the problem. The coordinated application of the integration approach and clustering are key components of effective management of the tourism industry in terms of sustainable development, providing favorable conditions for all participants in the industry and contributing to the sustainable and responsible development of tourism. The integration approach and clustering significantly improve the management of the tourism industry in the context of sustainable development, where the integration approach promotes the cooperation of various stakeholders and resources in the industry, while ensuring harmonious development. Clustering allows you to identify groups of similar objects or services, which allows you to effectively direct efforts to the development of specific segments of the tourist market (Atamanchuk, 2023).

The integration approach and clustering acquire key features as elements of management of the tourism industry in the context of sustainable development, where the integration of various sectors, such as the hotel business, transport, cultural activities and others, creates a comprehensive and balanced tourism product. Clustering allows to combine similar regions or services for joint development, but it is also important to take into account socio-cultural and environmental aspects to ensure sustainable development. Application of these approaches will improve competitiveness and ensure effective use of tourism potential (Berkova, 2018).

Analysis of publications on the problem. Actual questions regarding the use of the integration approach and clustering for the purpose of effective management of the tourism industry in conditions of sustainable development were considered by many scientists, among the main ones are: T. Aleksieieva, Z. Atamanchuk, N. Boretska, H. Krapivina, I. Marchenko, Yu. Borutska, O. Krupa, N. Stoiko, N. Homolska, Yu. Tymchyshyn-Chemerys, M. Ihnatenko, L. Levaieva, O. Antonov, O. Klok, V. Mazur, O. Halko, L. Marmul, I. Romaniuk, O. Marchenko, L. Matviichuk, A. Vasylchynko, Yu. Dashchuk, I. Melnyk, B. Miziuk, Yu. Myronov, R. Mudrak, N. Moisieieva, M. Ohiienko, Yu. Liubarov, O. Perepeliukova, O. Rodina, O. Khytra, V. Khudaverdiieva, I. Shamara and others. However, the issue of the implementation of the integration approach and clustering in the tourism industry is not fully resolved, which in turn encourages further research on this topic.

Statement of the main results. An integrative approach and clustering can be powerful tools for effective tourism management, as the integration of different aspects and the application of clustering can help deal with complexity and increase coherence in the tourism industry (Cherneha, 2022; Drebot and Babikova, 2021).

The peculiarity of the study of effective management of the tourism industry in conditions of sustainable development with the help of an integration approach and clustering is as follows: these concepts must be considered

through the prism of their importance in the context of tourism and sustainable development (Table 1).

Table 1

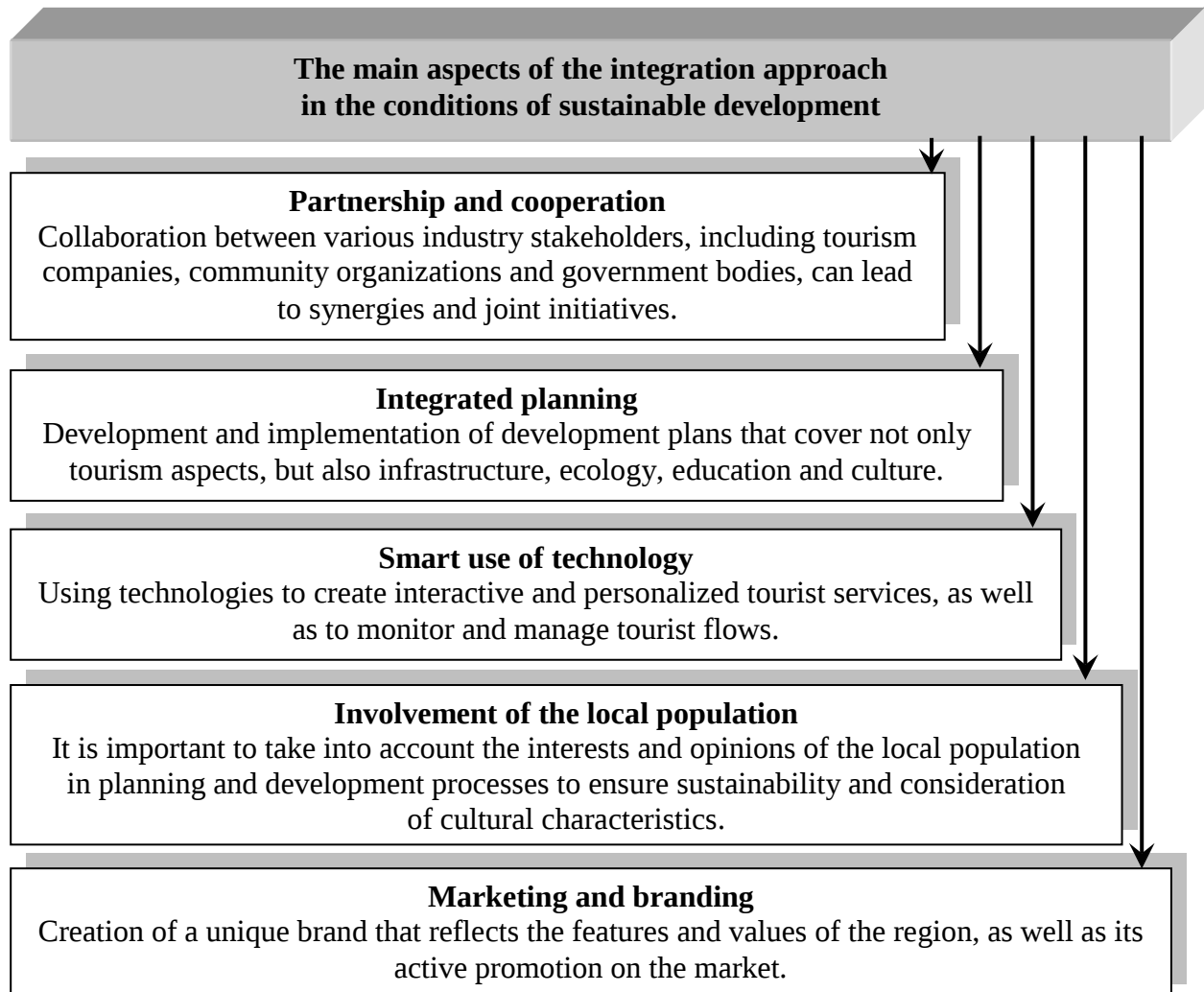
The importance and application of effective management of the tourism industry in conditions of sustainable development using an integration approach and clustering

Approach	Meaning	Characteristic
Integration approach	Importance	An integrative approach means combining various elements and aspects of the tourism industry into a single, well-directed mechanism. This may involve collaboration between different industries, government bodies, local communities and other stakeholders.
	Application in tourism	In the context of tourism, this may include the integration of services, infrastructure and various types of tourism (cultural, environmental, sports, etc.). Ensuring interaction between different players and developing integrated approaches to problems and opportunities.
Clustering	Importance	Clustering refers to the grouping of similar elements into related groups. In tourism, this can refer to the grouping of regions or locations with similar attributes, which can facilitate effective management.
	Application in tourism	The creation of tourist clusters can contribute to the optimization of marketing strategies, the development of common resources and services, as well as to increase the competitiveness and sustainability of tourism development in a certain area.
Effective management in conditions of sustainable development	Importance	Effective management of the tourism industry in terms of sustainable development requires a balanced approach to the economic, social and environmental aspects of tourism. An integrative approach and clustering can help develop tourism in such a way as to ensure the preservation of natural and cultural resources, improve the quality of services and the satisfaction of tourists.
	Application in tourism	Effective management of the tourism industry in terms of sustainable development requires a balanced approach to the economic, social and environmental aspects of tourism. An integrative approach and clustering can help develop tourism in such a way as to ensure the preservation of natural and cultural resources, improve the quality of services and the satisfaction of tourists.

Source: built by the authors on the basis of (Haponenko and Shulha, 2020; Khudaverdiieva, 2022).

An integrative approach to the management and development of the tourism industry can be a powerful tool for creating a holistic and effective environment. This means the joint action of various stakeholders, such as government bodies, local communities, businesses, and even non-profit

organizations. Among the main aspects of the integration approach, the following are highlighted (Fig. 1).

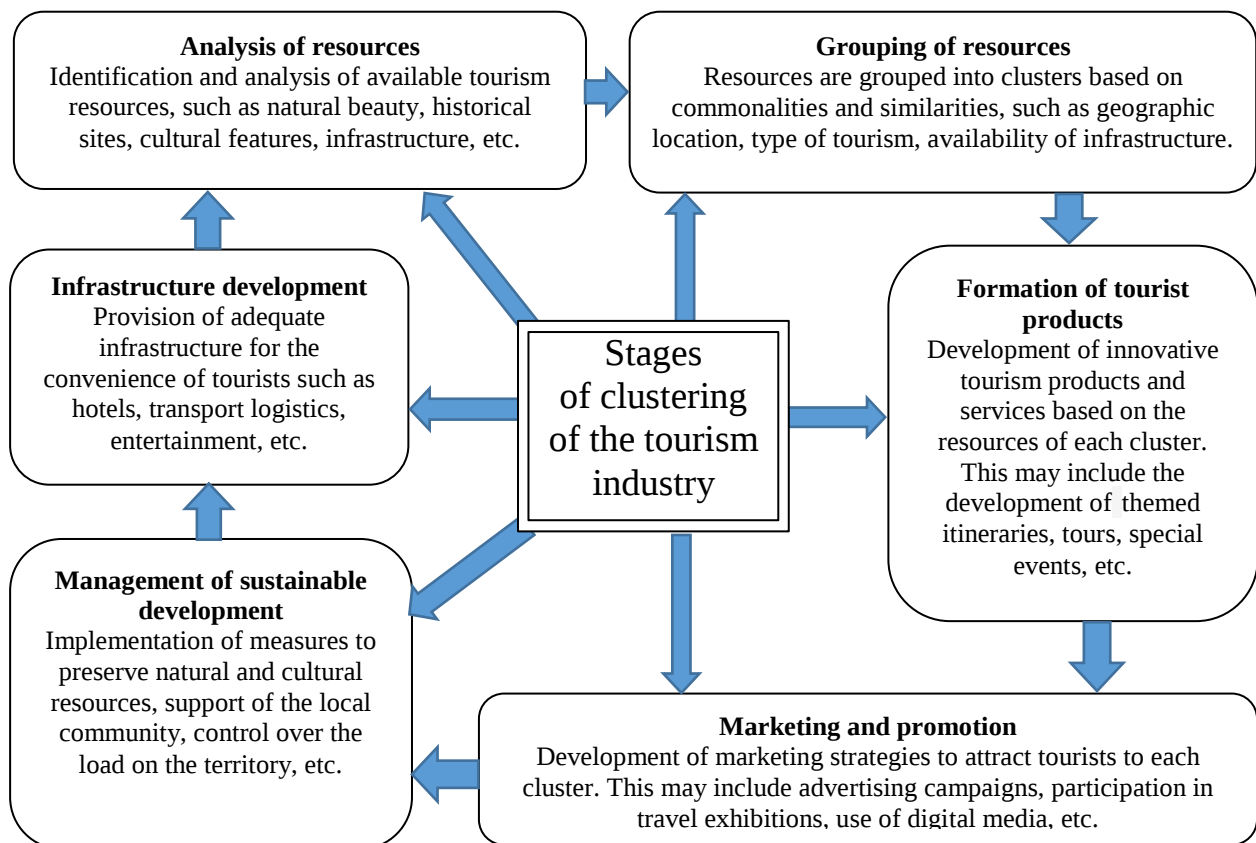


Source: built by the authors on the basis of (Khytra, 2022; Kobchenko, 2020; Lisovyi and Dolha, 2020).

Fig. 1. The main aspects of the integration approach in the context of sustainable development

Clustering of tourism development is a strategic approach to the management and development of the tourism industry, which involves the grouping of various tourism resources and facilities for the effective use of their potential. This approach makes it possible to create competitive tourist destinations, promote an even distribution of the tourist load and ensure the sustainable development of territories (Puzyrova, 2022 a). The main stages of clustering of tourism development are shown in fig. 2.

Clustering of tourism development contributes to the effective use of resources, increasing competitiveness and creating a sustainable tourist destination (Mazur and Halko, 2022).



Source: built by the authors on the basis of (Mykhailichenko and Dvorska, 2022; Olshanska and Kotsenko, 2015).

Fig. 2. The main stages of clustering of the tourism industry in conditions of sustainable development

An integrative approach to the management and development of the tourism industry consists in close cooperation of various stakeholders and sectors, as well as in taking into account the interrelationships between various aspects of tourism (Mudrak and Moisieieva, 2018). Key elements of the integration approach in the tourism industry include:

- industry integration: public-private partnership (cooperation between government bodies, the private sector and the public for the joint development of tourism); cooperation between different sectors (taking into account the interrelationships of tourism with other sectors, such as transport, culture, education and others);
- local integration: infrastructure development (joint investment in tourist infrastructure that serves various aspects of the tourist experience); preservation of nature and cultural values (ensuring the development of tourism that respects and supports local ecosystems and cultural traditions);
- technological integration: use of information technologies (development of electronic platforms for easy access to information about tourist services and

resources); digital marketing (application of digital strategies to promote a tourism product and attract an audience);

– cultural integration: involving the local population (taking into account the interests and views of the local population in the development of tourism); development of authentic tourist offers (creation of unique and authentic tourist experiences);

– sustainability and responsible tourism: environmental and social standards (implementation of standards and policies aimed at preserving the environment and social responsibility).

Therefore, an integrative approach can contribute to the creation of a balanced and sustainable tourism environment and tourism clusters that benefit both tourists and the local population (Olshanska and Melnyk, 2017).

Tourist clusters are a concept of tourism development, which is based on the idea of uniting various tourist enterprises and services in a specific geographical area in order to increase competitiveness and create favorable conditions for the development of tourism in this region (Puzyrova, 2022 b).

The main principles and significance of tourist clusters are given in table 2.

Thus, tourism clusters are a strategic tool for creating a sustainable and competitive tourism region. The importance of tourist clusters is that they contribute to increasing the attractiveness of the region for tourists, increase the quality and variety of tourist services, and also contribute to the growth of the economy and the creation of new jobs.

In Ukraine, the concept of an integrative approach to the management and development of the tourism industry is key to creating a sustainable and competitive tourism system. We offer several key aspects of this concept in the context of Ukraine:

1. Cooperation between different levels of government. The integration approach includes active cooperation between the central and regional power structures, which allows ensuring the coherence of development strategies and taking into account the specifics of each region.

2. Involvement of industry players. It is necessary to take into account the opinion and interests of business representatives, the public and other industry players. Joint initiatives ensure more efficient use of resources and create favorable conditions for entrepreneurship in the field of tourism.

3. Development of tourist infrastructure. The integration approach involves joint efforts in the development of tourist infrastructure, such as hotels, transport system, entertainment, which allows to create a full-fledged tourist product.

4. Marketing and promotion. Joint marketing campaigns and promotion of the national tourist brand contribute to increasing the recognition and attractiveness of Ukraine for foreign tourists.

5. Education and training. The development of tourism involves improving the qualifications of personnel in the field of service, hotel business, guides and other areas directly related to tourism (Puzyrova, 2019).

Table 2

Basic principles and significance of tourist clusters

<i>Basic principles of tourist clusters</i>			<i>The main meaning of tourist clusters</i>		
Principles	Geographic concentration	Tourist clusters are focused on a specific geographical area or location, where tourist resources and enterprises are combined.	Meaning	More efficient use of resources	The unification of tourist enterprises allows more efficient use of resources and ensures their interaction for joint development.
	Union of industries	Different industries of tourism, such as hotel business, restaurants, transport services, entertainment and others, are united for common development.		Investment attraction	Tourism clusters can become more attractive to investors, as joint development can lead to higher returns.
	Cooperation and partnership	The development of tourism clusters is based on active cooperation and partnerships between various participants, such as business, public organizations, authorities and other stakeholders.		Creation of new jobs	The development of tourist clusters contributes to the creation of new jobs in the region, which contributes to economic growth.
	Creating uniqueness	Clusters are aimed at creating a unique tourist product that stands out and attracts the attention of tourists.		Increasing competitiveness	Clusters allow regions to compete on the global tourism market, representing the combined power of various industries.
	Attracting innovation	Using the latest technologies and innovations to improve the quality and efficiency of tourist services.		Increasing tourist satisfaction	A wider range of services and a unique tourism product can increase tourist satisfaction and encourage repeat visits.

Source: built by the authors on the basis of (Olshanska and Puzyrova, 2022; Prokopenko, 2019).

In general, the integration approach in the context of Ukraine is aimed at creating a favorable environment for the development of tourism, coordinated activities of all interested parties and ensuring sustainable growth of the tourism industry.

Conclusions. Therefore, we found that the integration approach and clustering can be key elements of effective management of the tourism industry in conditions of sustainable development. An integrative approach involves cooperation between different players in the industry, such as government bodies, business, and community organizations, to achieve common sustainable development goals, which may include sharing information, resources, and joint projects. It has been proven that clustering, on the other hand, can help to group tourism enterprises and regions according to common characteristics or goals, which contributes to more efficient management of resources, development of joint marketing strategies and increased competitiveness. Together, these approaches can contribute to a more sustainable and efficient tourism industry, contributing to economic growth and conservation of natural and cultural resources.

The concept of an integrative approach to the management and development of the tourism industry of Ukraine includes a number of key aspects that contribute to the joint activities of various stakeholders, namely:

- strategic planning (development of a joint strategy for the development of tourism, which takes into account the interests of all participants, including state bodies, industry representatives, local communities and business);
- creation of tourism clusters (formation of regional tourism clusters, where various enterprises and organizations can unite for joint work, exchange of resources and innovations);
- infrastructure development (joint investment in tourism infrastructure, such as hotels, transport, cultural facilities and other amenities that will contribute to the improvement of the tourism product);
- marketing and promotion (joining efforts for marketing campaigns and promotion of the tourism brand of Ukraine at the international level);
- education and training (joint programs of training and development of personnel in the field of tourism to ensure a high level of service and quality of services);
- protection of nature and cultural heritage (development and implementation of joint strategies for the preservation of nature reserves, architectural monuments and other objects of cultural heritage);
- public participation (involvement of local communities and public organizations in the decision-making process and development of the tourism industry at the regional level);
- monitoring and evaluation (establishing a system for monitoring and evaluating the effectiveness of strategy implementation so that adjustments can be made and results can be improved).

Therefore, the integration approach and clustering as elements of effective management of the tourism industry in conditions of sustainable development

require close cooperation between government bodies, business, the public and other parties in order to create an integrated and sustainable tourism system in Ukraine.

REFERENCES:

Atamanchuk, Z. A. (2023). Turystychni klasteri yak mekhanizm heneratsii ta poshyrennia innovatsii [Tourist clusters as a mechanism for generating and spreading innovations]. *Efektivna ekonomika = Efficient economy*, No. 7. URL: http://nbuv.gov.ua/UJRN/efek_2023_7_30 [in Ukrainian].

Berkova, O. P. (2018). Aktualni problemy turystychnoi haluzi Ukrainy ta shliakhy yikh vyryshennia za umov transformatsii sotsialno-ekonomichnoho seredovyshcha [Actual problems of the tourist industry of Ukraine and ways to solve them under the conditions of transformations of the socio-economic environment]. *Heohrafiia ta turyzm = Geography and tourism*, Vol. 42, P. 23–28 [in Ukrainian].

Cherneha, O. M. (2022). Transformatsiia turystychnoi haluzi pid chas viiny v Ukraini cherez tsyfrovi tekhnolohii [Transformation of the tourism industry during the war in Ukraine through digital technologies]. *Naukovi zapysky Natsionalnoho universytetu "Ostrozka akademiia". Serii: Ekonomika = Scientific notes of the National University "Ostroh Academy". Series: Economy*, No. 6, P. 43–50 [in Ukrainian].

Drebot, O. I., Babikova, K. O. (2021). Orhanizatsiino-ekonomichni mekhanizmy rozvytku rekreatsijnoho turyzmu v konteksti Yevrointehratsii [Organizational and economic mechanism of development of recreational tourism in the context of European integration]. *Ahroekolohichni zhurnal = Agroecological journal*, No. 2, P. 78–86 [in Ukrainian].

Haponenko, H. I., Shulha, N. V. (2020). Suchasni tendentsii ta perspektyvy vprovadzhennia informatsiinykh tekhnolohii v turystychnii haluzi Ukrainy [Modern trends and prospects of the introduction of information technologies in the tourism industry of Ukraine]. *Visnyk Kharkivskoho natsionalnoho universytetu imeni V. N. Karazina. Serii: Mizhnarodni vidnosyny. Ekonomika. Krainoznavstvo. Turyzm = Bulletin of Kharkiv National University named after V. N. Karazin. Series: International relations. Economy. Local studies. Tourism*, Vol. 11, P. 111–120 [in Ukrainian].

Khudaverdieva, V. A. (2022). Mizhnarodnyi turyzm yak chynnyk yevropeiskoi intehratsii Ukrainy: istoriia, suchasnyi stan i perspektyvy rozvytku [International tourism as a factor of European integration of Ukraine: history, current state and development prospects]. *Pivdennyi arkhiv. Istorychni nauky = Southern archive. Historical sciences*, No. 39, P. 35–43 [in Ukrainian].

Khytra, O. V. (2022). Synerhetychni efekty klasteryzatsii rekreatsijno-turystychnoho biznesu yak peredumova staloho rehionalnoho rozvytku [Synergistic effects of clustering of the recreational and tourist business as a prerequisite for sustainable regional development]. *Naukovi pratsi Mizhrehionalnoi akademii upravlinnia personalom. Ekonomichni nauky = Scientific works of the Interregional Academy of Personnel Management. Economic sciences*, Issue 3, P. 109–119 [in Ukrainian].

Kobchenko, A. A. (2020). Suchasnyi stan rozvytku pidpriemstv turystychnoi haluzi Ukrainy [The current state of development of enterprises in the tourism industry of Ukraine]. *Ekonomichni prostir = Economic space*, No. 153, P. 56–60 [in Ukrainian].

Lisovyi, A. V., Dolha, H. V. (2020). Stratehichni analiz potentsialu turystychnoi haluzi Ukrainy [Strategic analysis of the potential of the tourism industry of Ukraine]. *Visnyk KhNAU. Serii: Ekonomichni nauky = KHNAU Bulletin. Series: Economic Sciences*, No. 2, P. 17–32 [in Ukrainian].

Mazur, V. S., Halko, O. V. (2022). Turystychnyi klaster – instrument rehionalnoho rozvytku ta ekonomichnoho zrostantia [Tourist cluster – a tool of regional development and economic growth]. *Stratehiia ekonomichnoho rozvytku Ukrainy = Strategy of economic development of Ukraine*, Issue 50, P. 134-149 [in Ukrainian].

Mudrak, R. P., Moisieieva, N. I. (2018). Klasteryzatsiia yak napriam efektyvnogo upravlinnia turystychnymy destynatsiiamy rehionu [Clustering as a direction of effective management of tourist destinations in the region]. *Ukrainskyi zhurnal prykladnoi ekonomiky = Ukrainian Journal of Applied Economics*, Vol. 3, No. 3, P. 126–132 [in Ukrainian].

Mykhailichenko, H. I., Dvorska, I. V. (2022). Antykryzova reanimatsiia turystychnoi haluzi Ukrainy v pisliavoiennyi period [Anti-crisis resuscitation of the tourist industry of Ukraine in the post-war period]. *Biznes Inform = Business Inform*, No. 8, P. 146–150 [in Ukrainian].

Olshanska, O. V., Kotsenko, K. F. (2015). Rozvytok turyzmu yak vazhlyvyi skladnyk derzhavnoi rehionalnoi polityky Ukrainy [Development of tourism as an important component of the state regional policy of Ukraine]. *Formuvannia rynkovykh vidnosyn v Ukraini = Formation of market relations in Ukraine*, No. 12, P. 158–162 [in Ukrainian].

Olshanska, O. V., Melnyk, A. O. (2017). Rehionalni turystychni klasteri yak vazhlyvyi chynnyk ekonomichnoho zrostantia [Regional tourism clusters as an important factor of economic growth]. *Formuvannia rynkovykh vidnosyn v Ukraini = Formation of market relations in Ukraine*, No. 12, P. 212–216 [in Ukrainian].

Olshanska, O., Puzyrova, P. (2022). The current state of the tourist industry of Ukraine and the prospects of its integration into the European Union. *Management*, Issue 2 (36), P. 79–89.

Prokopenko, T. P. (2019). Rozvytok turystychnoi haluzi v Ukraini: teoretychni ta ekonomichni aspekty [Development of the tourism industry in Ukraine: theoretical and economic aspects]. *Heohrafiia ta turyzm = Geography and tourism*, Vol. 53, P. 16–26 [in Ukrainian].

Puzyrova, P. V. (2019). Kontseptsii funktsionuvannia ta stratehii rozvytku pidpriemstv hotelno-restoranoi sfery [The concept of functioning and development strategies of enterprises in the hotel and restaurant sphere]. *Formuvannia rynkovykh vidnosyn v Ukraini = Formation of market relations in Ukraine*, No. 7–8 (218–219), P. 52–58 [in Ukrainian].

Puzyrova, P. (2022 a). European integration strategy for tourism development of Ukraine. *Management*, Issue 2 (36), P. 68–78.

Puzyrova, P. V. (2022 b). Rozvytok stratehichnoho partnerstva na osnovi stvorennia innovatsiinoi biznes-modeli povoiennoho rozvytku turyzmu v Ukraini [Development of strategic partnership based on the creation of an innovative business model of post-war tourism development in Ukraine]. *Aktualni problemy ekonomiky = Actual problems of economics*, No. 8 (254), P. 39–48 [in Ukrainian].

Puzyrova, P. V., Khaliliaeva, O. V., Spivak, S. I., Porokhnia, D. O. (2023). International economic activity in the conditions of economic integration. *Formuvannia rynkovykh vidnosyn v Ukraini = Formation of market relations in Ukraine*, No. 4 (263), P. 42–50.

Rodina, O. H. (2021). Turystychna haluz Ukrainy v konteksti suchasnykh intehtatsiinykh protsesiv [The tourism industry of Ukraine in the context of modern integration processes]. *Aktualni problemy rozvytku ekonomiky rehionu = Actual problems of the development of the economy of the region*, Vol. 17(2), P. 167–178 [in Ukrainian].

Shamara, I. M. (2014). Intehtatsiini protsesy v upravlinni pidpriemstv turystychnoi haluzi [Integration processes in the management of tourist industry enterprises]. *Visnyk*

Kharkivskoho natsionalnoho universytetu imeni V. N. Karazina. Serii: Mizhnarodni vidnosyny. Ekonomika. Krainoznavstvo. Turyzm = Bulletin of the Kharkiv National University named after V. N. Karazin. Series: International relations. Economy. Local studies. Tourism, No. 1144, Vol. 3(1), P. 179–182 [in Ukrainian].

Ukrainski turystychni marshruty uspishno intehruiutsia u yevropeyskyi turystychnyi prostir [Ukrainian tourist routes are successfully integrated into the European tourist space]. *tourism.gov.ua*. URL: <https://www.tourism.gov.ua/blog/ukrayinski-turistichni-marshruti-uspishno-integruiutsia-u-ievropeyskiy-turistichniy-prostir> [in Ukrainian].

Yarovyi, V. F. (2016). Yevrointehratsiia ta vitchyzniani turyzm: osnovni aspekty [European integration and domestic tourism: main aspects]. *Naukovyi visnyk Khersonskoho derzhavnoho universytetu. Ser.: Ekonomichni nauky = Scientific Bulletin of Kherson State University. Series: Economic Sciences*, No. 17(4), P. 21–23 [in Ukrainian].

Zaiachkovska, H. (2017). Monitorynh yevrointehratsii Ukrainy u sferi turyzmu [Monitoring of the European integration of Ukraine in the field of tourism]. *Zhurnal yevropeiskoi ekonomiky = Journal of European Economy*, Vol. 16, No. 2, P. 241–255 [in Ukrainian].

AUTHOR (S) BIOSKETCHES



Olshanska Oleksandra, D.Sc in Economics, Professor, Dean of the Faculty of Management and Business Design, Kyiv National University of Technologies and Design, Ukraine.

<https://orcid.org/0000-0003-1535-7742>

Scopus Author ID: 56669957300

Researcher ID: N-1996-2018

E-mail: alexolsh8@gmail.com



Puzyrova Polina, D.Sc in Economics, Associate Professor, Department of Smart Economics, Kyiv National University of Technologies and Design, Ukraine.

<http://orcid.org/0000-0003-0839-8730>

Scopus Author ID: 36070051700

Researcher ID: AAE-9967-2019

E-mail: puzyrova@ukr.net



Shevchenko Oleg, PhD in Economics, Associate Professor, Department of tourism, hotel and restaurant business, Kyiv National University of Technologies and Design, Ukraine.

<https://orcid.org/0000-0003-0431-7307>

Scopus Author ID: 57200147511

E-mail: oshevchenko1@gmail.com

COPYRIGHTS

©2023 The author(s). This is an open access article distributed under the terms of the Creative Commons Attribution (CC BY 4.0), which permits unrestricted use, distribution, and reproduction in any medium, as long as the original authors and source are cited. No permission is required from the authors or the publishers.

HOW TO CITE THIS ARTICLE

Olshanska, O., Puzyrova, P., Shevchenko, O. (2023). Integrative approach and clusterization as elements of effective tourism industry management in the conditions of sustainable development. *Management*, 2(38): 48–60. <https://doi.org/10.30857/2415-3206.2023.2.4>.

JEL Classification:
L86

UDC 330.341

DOI: 10.30857/
2415-3206.
2023.2.5

THE CONCEPTUAL BASIS FOR THE FORMATION AND IMPLEMENTATION OF THE MARKETING STRATEGY FOR THE INNOVATIVE DEVELOPMENT OF ENTERPRISES IN DIGITALIZATION CONDITIONS

Olena CHERNIAVSKA¹, Ivan HOLOVACHOV¹

¹*Kyiv National University of Technologies and Design, Ukraine*

THE PURPOSE OF THE ARTICLE is to determine the theoretical and methodological essence of the conceptual foundations of building and implementing a marketing strategy in the conditions of innovative development for enterprises through digitalization factors.

RESEARCH METHODS. The article used general scientific and general economic methods: analysis and synthesis, grouping and classification, tabular, graphic methods, method of structural and logical analysis, etc.

PRESENTING MAIN MATERIAL. Modern marketing plays a key role in the innovation process, especially in the context of the interaction of the main economic categories. It was established that the importance of marketing in the innovative development of the enterprise is determined by: market orientation; market research; product positioning; interaction with consumers; creating demand; product life cycle management; competitiveness. It was determined that the marketing strategy is an action plan aimed at achieving the marketing goals of the enterprise, where its main essence is how to effectively bring a product or service to the market, attract the target audience and ensure the competitiveness of the enterprise. Digitalization has proven to open up endless opportunities for marketing, but it also poses challenges related to changes in consumer behavior and the competitive environment, where the main rule is to remain able to adapt and improve the marketing strategy on the way to its digital

success. The main principles and tasks of marketing strategy in the conditions of digitalization are defined. The process of implementing the marketing strategy is proposed, which consists of the following successive iterations: analysis of the digital environment; implementation of digital technologies; personalized marketing strategies; creation of a digital brand; participation in digital platforms; cooperation and partnership; monitoring and analysis of results.

CONCLUSIONS. Because of the research, we established that the conceptual basis for implementation of the marketing strategy is a complex dynamic process that includes a theoretical and methodological basis based on a synergistic combination of the interaction of the main economic categories. We determined that the conceptual basis includes the marketing strategy itself, its main elements, the key steps in the formation of the marketing strategy, the main principles of the formation of the marketing strategy, the basic tools and tasks of the formation of the marketing strategy, as well as the process of implementing a marketing strategy in the conditions of digitalization.

KEYWORDS: conceptual basis; formation and implementation of marketing strategy; innovative development of enterprises; digitalization; personalization; digital brand; agile (iterative) approach; digital technologies; branding; innovative opportunities; competitiveness.

NUMBER OF REFERENCES	NUMBER OF FIGURES	NUMBER OF TABLES
27	2	2

JEL Classification:
L86

УДК 330.341

DOI: 10.30857/
2415-3206.
2023.2.5

КОНЦЕПТУАЛЬНИЙ БАЗИС ФОРМУВАННЯ ТА РЕАЛІЗАЦІЇ МАРКЕТИНГОВОЇ СТРАТЕГІЇ ІННОВАЦІЙНОГО РОЗВИТКУ ПІДПРИЄМСТВ В УМОВАХ ЦИФРОВІЗАЦІЇ

Олена ЧЕРНЯВСЬКА¹, Іван ГОЛОВАЧОВ¹

¹Київський національний університет технологій та
дизайну, Україна

МЕТОЮ СТАТТІ є дослідження теоретико-методичних основ та концептуального базису формування та реалізації маркетингової стратегії інноваційного розвитку підприємств в умовах цифровізації.

МЕТОДИ ДОСЛІДЖЕННЯ. В статті було використано загальнонаукові та загально-економічні методи: аналізу та синтезу, групування й класифікації, табличний, графічний методи, метод структурного та логічного аналізу та ін.

ВИКЛАД ОСНОВНОГО МАТЕРІАЛУ.

Сучасний маркетинг відіграє ключову роль в інноваційному процесі, особливо в контексті взаємодії основних економічних категорій. Встановлено, що важливість маркетингу в інноваційному розвитку підприємства визначає: ринкова орієнтація; дослідження ринку; позиціонування продукту; взаємодія зі споживачами; створення попиту; керування життєвим циклом продукту; конкурентоспроможність. Визначено, що маркетингова стратегія – це план дій, спрямований на досягнення маркетингових цілей підприємства, де основна її сутність полягає в тому, як ефективно вивести продукт чи послугу на ринок, залучити цільову аудиторію та забезпечити конкурентоспроможність підприємства. Доведено, що цифровізація відкриває безмежні можливості для маркетингу, проте вона також ставить виклики, пов'язані із змінами у споживчій поведінці та конкурентному середовищі, де головне правило – залишатися спроможним до адаптації та вдосконалення маркетингової стратегії на шляху до її цифрового успіху. Визначено основні принципи та завдання формування маркетингової стратегії інноваційного розвитку підприємств

в умовах цифровізації. Запропоновано процес реалізації маркетингової стратегії інноваційного розвитку підприємств у умовах цифровізації, що складається з таких послідовних ітерацій: аналіз цифрового середовища; впровадження цифрових технологій; персоналізовані маркетингові стратегії; створення цифрового бренду; участь у цифрових платформах; співпраця та партнерство; моніторинг та аналіз результатів.

ВИСНОВКИ. В результаті дослідження нами було встановлено, що концептуальний базис формування та реалізації маркетингової стратегії інноваційного розвитку підприємств в умовах цифровізації – це складний динамічний процес, який включає теоретико-методологічну основу, засновану на синергічному поєднанні взаємодії основних економічних категорій. Нами було визначено, що концептуальний базис формування та реалізації маркетингової стратегії інноваційного розвитку підприємств в умовах цифровізації включає саму маркетингову стратегію, основні її елементи, ключові кроки щодо формування маркетингової стратегії, основні принципи формування маркетингової стратегії, базові інструменти та завдання формування маркетингової стратегії, а також процес реалізації маркетингової стратегії інноваційного розвитку підприємств у умовах цифровізації.

КЛЮЧОВІ СЛОВА: концептуальний базис; формування та реалізації маркетингової стратегії; інноваційний розвиток підприємств; цифровізація; персоналізація; цифровий бренд; агільний (ітераційний) підхід; цифрові технології; брендування; інноваційні можливості; конкурентоспроможність.

Statement of the problem. In modern conditions, the concept of marketing is difficult to overestimate, since marketing has always played an important role in the innovation process, promoting interaction between various economic entities. With the help of marketing, there is an assessment of consumer needs, the creation of a sales strategy of innovative ideas on the market. Without an effective marketing system at the enterprise, any innovative development will not be able to reach its full potential (Bilovodska and Shebeda, 2021).

Digitization also makes adjustments in all areas of business. Changes in the way we interact with customers, collect and analyze data create new opportunities, but also require new approaches. One of the benefits of digitalization is the ability to precisely target marketing efforts through personalization, where data analysis can help understand needs and anticipate market trends. In addition, it is important to create innovative products and services that meet the demands of the digital market (Bychkova and Puzyrova, 2022; Krasovska, 2021).

Therefore, the formation of a marketing strategy should include an effective online presence, the use of social networks, and the possibility of interactive communication with customers.

Analysis of publications on the problem. The relevance of the researched topic is undeniable, since many scientists have devoted attention to the study of issues related to the marketing strategy of enterprises in the conditions of digitalization: O.A. Bilovodska, K.V. Shebeda, V.H. Hnoievyi, O.M. Koren, D.V. Doroshkevych, O.S. Yevseitseva, D.V. Zavadska, A.V. Zerkal, V.V. Holomb, L.S. Ihnatovych, M.M. Ivanov, S.M. Illiashenko, Yu.S. Shypulina, I.S. Lytvynenko, N.S. Illiashenko, S.V. Kovalchuk, P.V. Puzyrova, O.Yu. Krasovska, V.O. Morokhova, O.V. Boiko, A.O. Lapan, I.F. Lorvi, M.S. Mudra, Ts. Tszin, N.V. Proskurnina, I.L. Reshetnikova, L.V. Romanova and others. However, the part of the issue that is dedicated to the formation and implementation of a marketing strategy remains quite unresolved.

Statement of the main results. Modern marketing plays a key role in the innovation process, especially in the context of the interaction of the main economic categories. Let's understand the importance of marketing in the innovative development of the enterprise (Doroshkevych, 2022; Hnoievyi and Koren, 2021):

The 1st focus is market orientation. Marketing promotes market orientation, where the enterprise studies the needs and wishes of customers, which allows enterprises to create innovations that meet the real requirements of consumers.

The 2nd focus is market research. Marketing research helps gather data about the market, competitors, and consumer trends. These data are an important element when making decisions about the direction of the innovation process.

The 3rd focus is product positioning. Marketing helps determine how to introduce a new product to the market, which involves developing and shaping brand and communications strategies that give the product a competitive advantage.

The 4th focus is interaction with consumers. Marketing allows businesses to interact with consumers to get feedback on innovations. This, in turn, helps in improving products and adapting them to changing market needs.

The 5th focus is the creation of demand. Marketing strategies help create demand for new products by implementing effective marketing campaigns, which is extremely important for successful innovation in the market.

The 6th focus is product life cycle management. Marketing helps manufacturers manage the product life cycle by defining the stages from initial launch to withdrawal from the market.

The 7th focus is competitiveness. Ensuring competitiveness is a key task of marketing in the innovation process. Effective marketing strategies allow companies to take a strong position in the market.

Thus, all these foci prove that marketing is an important factor of the innovation process, ensuring adaptation to market conditions and responding to consumer needs.

However, marketing itself at the enterprise is not enough for its successful innovative development, it is necessary to develop, form and constantly improve a marketing strategy that will help quickly and effectively lead the enterprise to a new innovative path of development using available digital tools (Holovachov, 2023; Ihnatovych and Ivanov, 2021).

Therefore, a marketing strategy is an action plan aimed at achieving the company's marketing goals. Its main essence is how to effectively bring a product or service to the market, attract the target audience and ensure competitiveness. The main elements of the marketing strategy are defined as (Illiaschenko, 2022; Kovalchuk, 2021; Puzyrova, 2020):

goals – clearly defined goals that marketing activity should achieve. It can be an increase in sales, an increase in brand recognition, an expansion of the audience, etc.;

target audience – understanding and determining who the product or service is intended for, where audience targeting allows you to effectively direct marketing efforts;

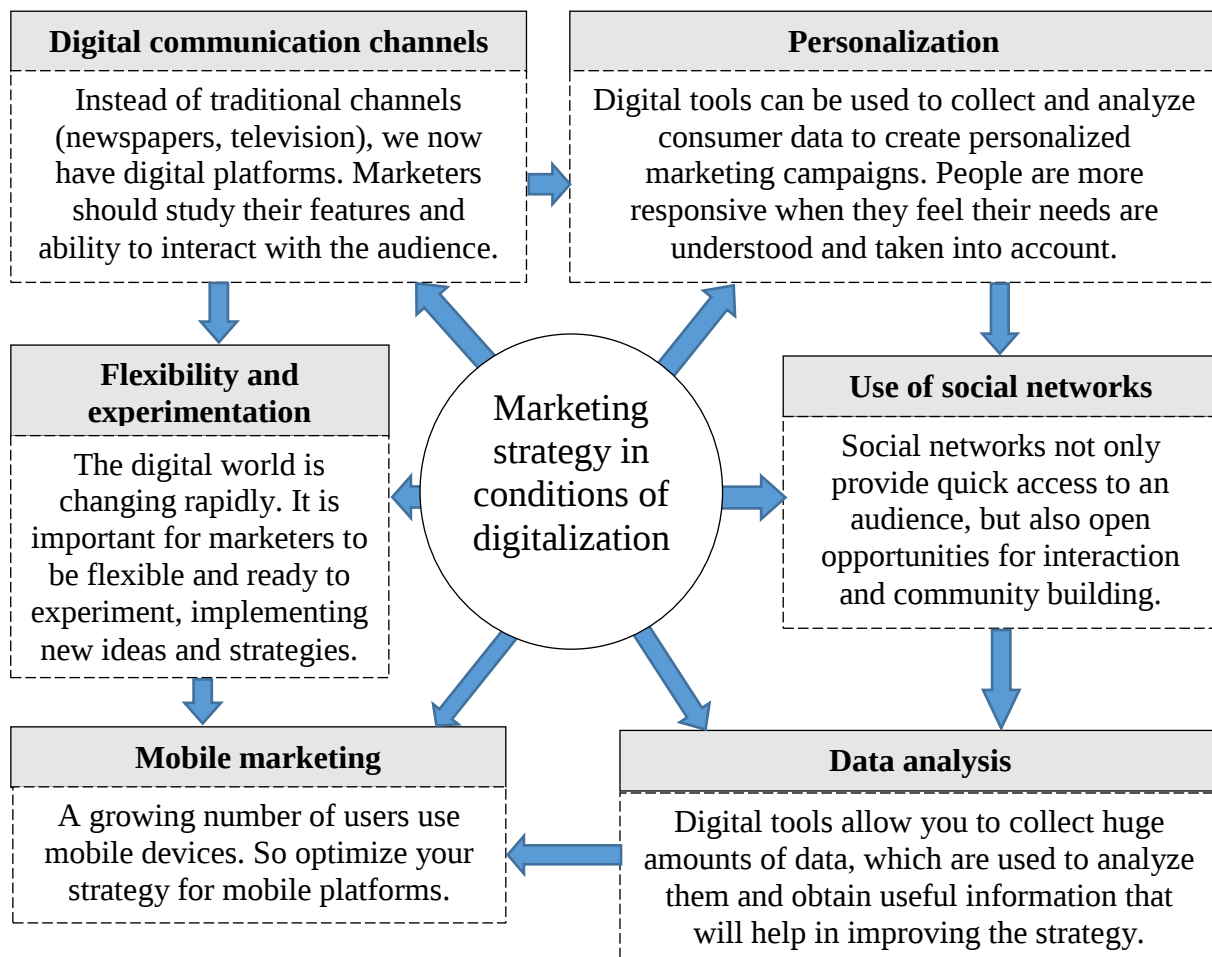
positioning – defining the unique characteristics of a product or brand that make it different from competitors and attractive to consumers;

marketing strategies – the choice of methods and tools that will be used to achieve the set goals, which may include advertising, promotions, content marketing, Internet marketing, etc.;

monitoring and analysis – constant monitoring of the results of marketing activities, as well as analysis of changes in the market and among competitors.

All these components are combined into a single strategic plan that helps the enterprise to successfully interact with the market and achieve its business goals. In the conditions of digitalization, the marketing strategy acquires a lot of importance.

Digitalization opens up endless opportunities for marketing, but it also poses challenges related to changes in consumer behavior and the competitive environment. The rule of thumb is to stay ready to adapt and improve your strategy on your way to digital success. The main are shown in fig. 1.



Source: built by the authors on the basis of (Kramar and Puzyrova, 2019; Yevseitseva, 2016; Zerkal and Holomb, 2021).

Fig. 1. Basic aspects of marketing strategy in the conditions of digitalization

The formation of a marketing strategy is a key task for ensuring the competitiveness and sustainability of business (Morokhova, Boiko and Lorvi, 2021; Yevseitseva, 2017). Let's consider several key steps that should be taken into account when forming such a strategy:

Step 1. Analysis of the digital environment (assessment of the current state of the digital market and technological trends; study of consumer behavior in the digital environment and their expectations).

Step 2. Determination of innovative opportunities (identification of opportunities to use the latest technologies to improve production, marketing and customer service; the possibility of introducing artificial intelligence, the Internet of Things, blockchain and other innovative solutions).

Step 3: Target audience and personalization (using data to understand needs and previous interactions with customers; developing personalized marketing and service strategies).

Step 4. Development of a digital brand (determining how the company will be presented in the digital space; developing a strategy for using social networks, the website and other channels to support the brand).

Step 5. Competitor analysis (observation of competitors' activities in the digital environment; study of their digital marketing strategies and innovations).

Step 6. Agile (iterative) approach and experiments (using agile methodologies to quickly adapt to changes; conducting experiments to determine the effectiveness of various digital strategies).

Step 7. Education and engagement of staff (providing staff with the necessary skills to work with digital technologies; stimulating a culture of innovation and openness to innovative ideas).

Step 8. Monitoring and analysis of results (establishing metrics to measure the success of the digital strategy; regular analysis of data and introduction of adjustments to the strategy according to the results).

Thus, it can be concluded that the formation of an effective marketing strategy in the conditions of digitalization requires a combination of theoretical and methodological background, a deep understanding of digitalization technologies, innovative development of entrepreneurial activity, analytics and flexibility in adapting to changes in the marketing environment (Puzyrova, Khmelevskiy and Mammadova, 2022; Mudra and Tszin, 2023; Yevseitseva and Olshanska, 2023).

Among the main principles the following can be singled out (Table 1).

Marketing strategy in the conditions of digitalization requires creative and modern approaches, among which the key tools occupy an important place (Proskurnina, 2020; Puzyrova, 2011; Romanova, 2021):

1. Digital marketing: social networks, content marketing, advertising on the Internet; using analytics to collect data and determine the effectiveness of campaigns.
2. Electronic commerce: development of online trade and convenient electronic payment systems; building effective websites and mobile applications.
3. Innovative technologies: implementation of artificial intelligence, machine learning and other advanced technologies for data analysis and personalization.
4. CRM systems: use of customer relationship management systems to ensure effective interaction with customers and sales management.
5. Internet of Things (IoT): Adoption of IoT to collect production data, customer service and improve manufacturing processes.
6. Partnerships and collaborations: Collaborate with other innovative businesses and startups to share ideas and resources.
7. Education and involvement of personnel: training personnel in modern technologies and creating an innovative corporate culture.

Table 1

The main principles of marketing strategy in the digitalization sphere

Principle	The importance of principle
Analysis of the digital environment	Understanding and appreciating current technologies, trends and opportunities offered by the digital era allows businesses to adapt their strategies to rapid changes.
Focus on innovation	Development and implementation of innovative technologies in products and production processes, which will allow enterprises to remain competitive in conditions of rapid changes in the market.
Personalization of marketing	Using data and analytics to create personalized marketing strategies in a digital consumer environment.
Agile approach	Use of agile project management and product development methodology to quickly respond to changes in the environment and customer requirements.
Creating an ecosystem	Focusing on the enterprise as part of the ecosystem, which will help to collaborate with other companies and startups for joint development and innovation.
Digital marketing	Using online channels to advertise and sell products, interact with customers through social networks and other digital platforms.
Training and development of personnel	Providing training and professional development of personnel in the field of digital technologies for effective implementation of innovations.

Source: built by the authors on the basis of (Tkachenko et al., 2019; Yevseitseva and Subot, 2023; Reshetnikova, 2021).

These tools will help create an effective marketing strategy, ensuring competitiveness and successful of digitalization. The main tasks facing the marketing strategy are listed in the table 2.

Table 2

The main tasks of the marketing strategy in digitalization

Task	Objective
Analysis of the market and technological trends	Study of market trends and consumer needs in the context of the digital economy. Analysis of technological innovations and their impact on a specific industry.
Segmentation and selection of the target audience	Identification of key market segments and their needs. Defining the target audience for new innovative products or services.
Definition of the competitive environment	Analysis of competitors and their strategies in the conditions of digital competition. Identification of advantages and disadvantages of competitors.
Creating value for customers	Development, ensuring the uniqueness and value of the offer.
Use of digital marketing channels	Developing effective internet marketing strategies and using social media to promote products. Using analytics to measure campaign performance.
Branding and positioning	Development of a brand strategy that reflects the innovative nature of the enterprise. Determination of unique positioning in the market.
Creating partnerships and ecosystems	Interaction with other companies, creation of partnerships and ecosystems for joint implementation of innovative projects. Using synergies with partners to develop new products and services. Identification of potential risks associated with innovative projects and digitalization.
Risk management and security	Identification of potential risks associated with innovative projects and digitalization. Implementation of effective security and data protection measures.
Constant monitoring and adaptation	Implementation of a system for monitoring the results of marketing campaigns and consumer reactions. Flexible strategy adaptation based on changes in the environment and customer behavior.
Evaluation of efficiency	Determination of key performance indicators (KPI) to evaluate the results of the marketing strategy. Regular assessment of the compliance of the strategy with the company's goals and adjustment of the necessary aspects.

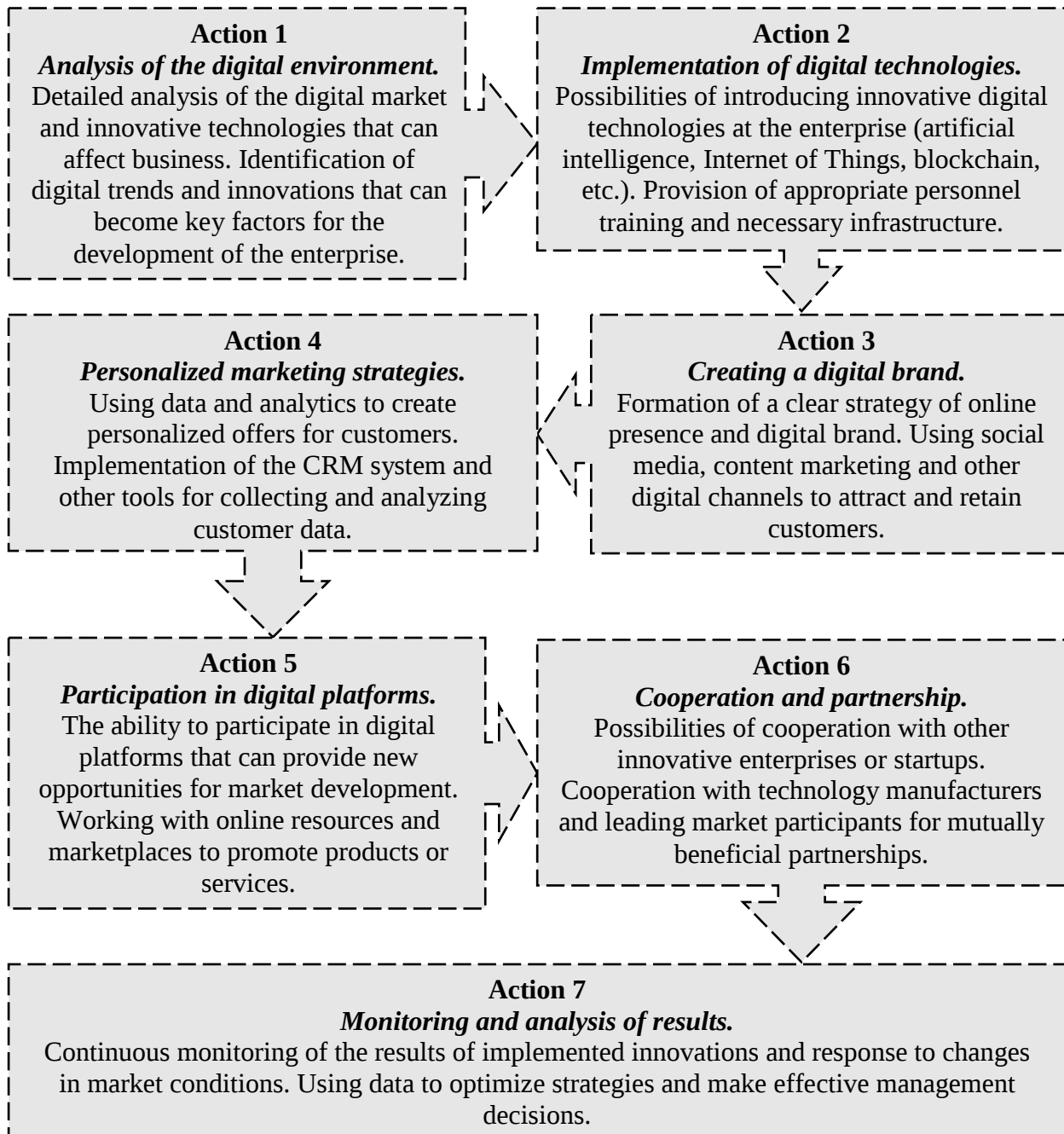
Source: supplemented by the authors on the basis of (Haponenko, 2022).

The final stage is to ensure its implementation. The process of implementing a marketing strategy consists of the following successive iterations (Fig. 2).

Therefore, these basic steps will help create an effective marketing strategy in digitalization.

Conclusions. Because of the research, we established that the conceptual basis is a complex dynamic process that includes a theoretical and methodological basis based on a synergistic combination of the interaction of the main economic categories. We determined that a marketing strategy is a

specific plan of action aimed at achieving the marketing goals of the enterprise above all the complexities of doing business.



Source: built by the authors on the basis of (Yankovets, 2022; Yevseitseva et al., 2022; Zavadska, 2023).

Fig. 2. The process of implementing the marketing strategy in digitalization

The conceptual basis of the innovative development of enterprises in the conditions of digitalization includes the marketing strategy itself, its main elements, key steps in the formation of the marketing strategy, the main

principles of the formation of the marketing strategy, basic tools and tasks of the formation of the marketing strategy.

Therefore, the conceptual basis is critically important for ensuring the competitiveness and sustainability of business. At the same time, it is established that digital technologies are rapidly transforming the business environment, and enterprises must adapt to these changes by using innovations in their marketing strategies.

REFERENCES:

Bilovodska, O. A., Shebeda, K. V. (2021). Formuvannia ta realizatsiia marketynhovoï stratehii mediakompanii v tsyfrovomu seredovyshchi: etapy ta pokaznyky otsiniuvannia [Formation and implementation of the marketing strategy of a media company in the digital environment: stages and evaluation indicators]. *Visnyk Kharkivskoho natsionalnoho universytetu imeni V. N. Karazina. Serii: Mizhnarodni vidnosyny. Ekonomika. Krainoznavstvo. Turyzm = Bulletin of Kharkiv National University named after V. N. Karazin. Series: International relations. Economy. Local studies. Tourism*, Issue 13, P. 50–59 [in Ukrainian].

Bychkova, V., Puzyrova, P. (2022). Theoretical basics of the strategy of the entry of foreign enterprises to the markets of Ukraine. *Innovatyka v osviti, nauksi ta biznesi: vyklyky ta mozhlyvosti = Innovation in education, science and business: challenges and opportunities: materials of the III All-Ukrainian Conference of Higher Education Graduates and young scientists*, Vol. 2, P. 10–16.

Doroshkevych, D. V., Lytvynenko, I. S., Lapan, A. O. (2022). Formuvannia tsyfrovoi marketynhovoï stratehii dlia pidpriemstva v haluzi eksportnoho konsaltnhu v umovakh didzhytal ekonomiky [Formation of a digital marketing strategy for an enterprise in the field of export consulting in the conditions of the digital economy]. *Molodyi vchenyi = Young scientist*, No. 2, P. 69–75 [in Ukrainian].

Hnoievyi, V. H., Koren, O. M. (2021). Suchasni tendentsii tsyfrovoho marketynhu ta yikh vplyv na formuvannia marketynhovoï stratehii [Modern trends of digital marketing and their influence on the formation of a marketing strategy]. *Akademichnyi ohliad = Academic review*, No. 1, P. 49–56 [in Ukrainian].

Holovachov, I. A. (2023). Stratehii tsyfrovoho marketynhu pidpriemstva [Strategies of digital marketing of the enterprise]. *Mizhnarodnyi naukovyi zhurnal "Internauka". Serii: Ekonomichni nauky = International scientific journal "Internauka". Series: Economic sciences*, No. 2, P. 95–100 [in Ukrainian].

Ihnatovych, L. S., Ivanov, M. M. (2021). Kontseptualnyi pidkhid formuvannia marketynhovoï stratehii sub'iektiv strakhovoho rynku v umovakh tsyfrovoi ekonomiky [Conceptual approach to the formation of the marketing strategy of insurance market subjects in the conditions of the digital economy]. *Pryazovskyi ekonomichnyi visnyk = Pryazovskyi Economic Bulletin*, Issue 4, P. 32–38 [in Ukrainian].

Illiashenko, S. M., Shypulina, Yu. S., Illiashenko, N. S. (2022). Upravlinnia na zasadakh marketynhu stratehiamy ekolohichno-orientovanoho innovatsiinoho rozvytku v povoiennyi period: natsionalnyi i mizhnarodnyi aspekty [Management on the basis of marketing strategies of ecologically-oriented innovative development in the post-war period: national and international aspects]. *Marketynh i tsyfrovi tekhnolohii = Marketing and digital technologies*, Vol. 6, No. 4, P. 47–60 [in Ukrainian].

Kovalchuk, S. V. (2021). Stratehichni napriamy rozvytku marketynhovykh tekhnolohii v umovakh hlobalnoi tsyfrovizatsii ekonomiky [Strategic directions of development of

marketing technologies in the conditions of global digitalization of the economy]. *Visnyk Khmelnytskoho natsionalnoho universytetu. Ekonomichni nauky = Bulletin of the Khmelnytskyi National University. Economic sciences*, No. 6 (2), P. 7–15 [in Ukrainian].

Kramar, M. S., Puzyrova, P. V. (2019). Zastosuvannia marketynhovoho instrumentarii vprovadzhennia innovatsii u pidpriemnytsku diialnist [Application of marketing tools for introducing innovations in business activity]. *Ekonomika, oblik, finansy ta pravo: analiz tendentsii ta perspektyv rozvytku = Economics, accounting, finance and law: analysis of trends and prospects for development: a collection of theses of reports of the International Scientific and Practical Conference, Part 3*, P. 58–59 [in Ukrainian].

Krasovska, O. Yu. (2021). Strukturno-funktsionalna skhema modeliuвання marketynhovoi diialnosti u sferi tsyfrovizatsii [Structural and functional scheme of modeling marketing activity in the field of digitalization]. *Ahrosvit = Agrosvit*, No. 18, P. 50–55 [in Ukrainian].

Morokhova, V. O., Boiko, O. V., Lorvi, I. F. (2021). Marketynh innovatsii yak kompleksnyi instrument dosiahnennia stratehichnykh tsilei pidpriemstva v umovakh konkurentnoho seredovyscha [Marketing of innovations as a complex tool for achieving strategic goals of the enterprise in the conditions of a competitive environment]. *Ekonomichni nauky. Serii: Rehionalna ekonomika = Economic Sciences. Series: Regional economy*, Issue 18, P. 123–130 [in Ukrainian].

Mudra, M. S., Tszin, Ts. (2023). Suchasni tekhnolohii formuvannia stratehii marketynhovoho menedzhmentu pidpriemstv yak imperatyv yikh innovatsiinoho rozvytku [Modern technologies for the formation of marketing management strategies of enterprises as an imperative for their innovative development]. *Prostorovi rozvytok = Spatial development*, Issue 4, P. 176–185 [in Ukrainian].

Proskurnina, N. V. (2020). Marketynhovi zbutovi stratehii pidpriemstv rozdrubnoi torhivli v umovakh tsyfrovoy ekonomiky [Marketing sales strategies of retail enterprises in the conditions of the digital economy]. *Visnyk KhNAU. Serii: Ekonomichni nauky = KHNAU Bulletin. Series: Economic sciences*, No. 4 (1), P. 99–113 [in Ukrainian].

Puzyrova, P. (2020). Using benchmarking to facilitate effective business development management. *Visnyk Kyivskoho natsionalnoho universytetu tekhnolohii ta dyzainu. Serii Ekonomichni nauky = Bulletin of Kyiv National University of Technologies and Design. Economic sciences series*, No. 1 (143), P. 69–78.

Puzyrova, P. V. (2011). Znachennia marketynhovoho doslidzhennia pry vyznachenni kliuchovykh faktoriv vplyvu na plan vyrobnytstva produktsii promyslovykh pidpriemstv [The value of marketing research in determining key factors influencing the production plan of industrial enterprises]. *Problemy pidvyshchennia efektyvnosti infrastruktury = Problems of increasing the efficiency of infrastructure: a collection of scientific papers*, Issue 30, P. 168–174 [in Ukrainian].

Puzyrova, P. V., Khmelevskiy, N. O., Mammadova, S. (2022). Main aspects of international marketing activities of export companies. *Formuvannia rynkovykh vidnosyn v Ukraini = Formation of market relations in Ukraine*, No. 7–8 (254–255), P. 124–131.

Reshetnikova, I. L. (2021). Transformatsiia funktsii i struktur marketynhu pidpriemstv v umovakh tsyfrovoy ekonomiky [Transformation of functions and structures of marketing of enterprises in the conditions of digital economy]. *Chasopys ekonomichnykh reform = Journal of economic reforms*, No. 2, P. 48–54 [in Ukrainian].

Romanova, L. V. (2021). Marketynhove upravlinnia yak stratehichna innovatsiina skladova suchasnoho rozvytku pidpriemnytstva na promyslovykh pidpriemstvakh [Marketing management as a strategic innovative component of the modern development of

entrepreneurship at industrial enterprises]. *Naukovi pratsi Mizhrehionalnoi akademii upravlinnia personalom. Ekonomichni nauky = Scientific works of the Interregional Academy of Personnel Management. Economic sciences*, Issue 1, P. 50–56 [in Ukrainian].

Tkachenko, V., Kwilinski, A., Tkachenko, I., Puzyrova, P. (2019). Theoretical and methodical approaches to the definition of marketing risks management concept at industrial enterprises. *Marketing and Management of Innovations*, Issue 2, P. 228–238.

Yankovets, T. (2022). Stratehichne upravlinnia tsyfrovym marketynhom [Strategic management of digital marketing]. *Scientia Fructuosa = Scientia Fructuosa*, No. 5, P. 93–112 [in Ukrainian].

Yevseitseva, O. S. (2016). Suchasni metodyky prohnozuvannia koniunktury rynku ta yikh vykorystannia pry provedenni marketynhovykh doslidzhen [Modern methods of forecasting the market situation and their use in conducting marketing research]. *Nauk.-praktych. zhurn. "Ekonomika i derzhava" = Scientific and practical journal "Economy and the State"*, No. 5, P. 97–100 [in Ukrainian].

Yevseitseva, O. S. (2017). Osoblyvosti rozrobky marketynhovoï stratehii vyshchoho navchalnogo zakladu [Peculiarities of developing a marketing strategy of a higher educational institution]. *Nauk.-praktych. zhurn. "Ekonomika i derzhava" = Scientific and practical journal "Economy and the State"*, No. 3, P. 77–81 [in Ukrainian].

Yevseitseva, O. S., Olshanska, Ya. O. (2023). Mekhanizm rozrobky SMM-stratehii dlia brendu produktsii pidpriemstva [Mechanism of SMM-strategy development for the company's product brand]. *Zhurnal stratehichnykh ekonomichnykh doslidzhen = Journal of strategic economic research*, No. 3 (14), P. 84–93 [in Ukrainian].

Yevseitseva, O. S., Subot, T. P. (2023). Rozrobka marketynhovoï stratehii yak chynnyka konkurentospromozhnosti na rynku turystychnykh posluh [Development of a marketing strategy as a factor of competitiveness in the market of tourist services]. *Innovatyka v osviti, nautsi ta biznesi: vyklyky ta mozhlyvosti = Innovation in education, science and business: challenges and opportunities: Materials of the 4th All-Ukrainian conference of higher education graduates and young scientists*, T. 1. P. 288 [in Ukrainian].

Yevseitseva, O., Liulchak, Z., Semenda, O., Jarvis, M., Ponomarenko, I. (2022). Digital-marketing as a modern tool for promotion of goods and services in social networks. *Finansovo-kredytna diialnist: problemy teorii i praktyky = Financial and credit activity: problems of theory and practice*, No. 1 (42), P. 361–370.

Zavadska, D. V. (2023). Marketynhovi stratehii intehtatsiinoho rozvytku bankiv v umovakh tsyfrovoi transformatsii [Marketing strategies of the integration development of banks in conditions of digital transformation]. *Mizhnarodnyi naukovyi zhurnal "Internauka". Serii: Ekonomichni nauky = International scientific journal "Internauka". Series: Economic sciences*, No. 7, P. 176–189 [in Ukrainian].

Zerkal, A. V., Holomb, V. V. (2021). Marketynhovi komunikatsiini stratehii pidpriemstva v umovakh tsyfrovizatsii ekonomiky [Marketing communication strategies of the enterprise in the conditions of digitalization of the economy]. *Mizhnarodnyi naukovyi zhurnal "Internauka". Serii: Ekonomichni nauky = International scientific journal "Internauka". Series: Economic sciences*, No. 12 (2), P. 15–21 [in Ukrainian].

AUTHOR (S) BIOSKETCHES



Cherniavska Olena, D.Sc in Economics, Professor of Department of Marketing and Communication Design, Kyiv National University of Technologies and Design, Ukraine.

<https://orcid.org/0000-0001-9819-578X>

Scopus Author ID: 57217259403

E-mail: cherniavska.ov@knuvd.edu.ua



Holovachov Ivan, Graduate student, Department of Marketing and Communication Design, Kyiv National University of Technologies and Design, Ukraine.

<https://orcid.org/0009-0008-6726-8569>

E-mail: holovachov.ia@knuvd.edu.ua

COPYRIGHTS

©2023 The author(s). This is an open access article distributed under the terms of the Creative Commons Attribution (CC BY 4.0), which permits unrestricted use, distribution, and reproduction in any medium, as long as the original authors and source are cited. No permission is required from the authors or the publishers.

HOW TO CITE THIS ARTICLE

Cherniavska, O., Holovachov, I. (2023). The conceptual basis for the formation and implementation of the marketing strategy for the innovative development of enterprises in digitalization conditions. *Management*, 2(38): 61–73. <https://doi.org/10.30857/2415-3206.2023.2.5>.

JEL Classification:
O13; Q1

UDC 338.631(477)

DOI: 10.30857/2415-
3206.2023.2.6

PROSPECTS FOR THE DEVELOPMENT OF THE AGRICULTURAL SECTOR OF UKRAINE IN THE CONDITIONS OF POST-WAR RECOVERY

Natalia GAVKALOVA¹

¹*Simon Kuznets Kharkiv National University of
Economics, Ukraine*

THE PURPOSE OF THIS ARTICLE is to determine promising directions for the development of the agro-industrial sector of Ukraine in the conditions of post-war recovery.

RESEARCH METHODS. In the process of writing the article, general scientific and special research methods of the agro-industrial sector were used, including: induction and deduction; structural and logical analysis; extrapolations; tabular and graphic.

PRESENTATION OF THE MAIN RESEARCH MATERIAL. The article determines that the agro-industrial sector is one of the key sectors of the country's economy, which made a significant contribution to the country's GDP before the war. Since the beginning of the war, the agro-industrial sector has suffered significant losses and needs to be restored and further developed. Prospective ways of development of the agro-industrial sector have been determined, which can be carried out in three key areas: activation of own reserves of agricultural enterprises; receiving donor international aid; development of the state agrarian policy of post-war recovery. It has been proven that the restoration of broken agro-

food chains and the inclusion of domestic agricultural enterprises in global agro-food chains is a promising direction for the development of the country's agro-industrial sector. It was found that the agro-food chain is a set of interdependent enterprises that have united on a voluntary basis and closely cooperate in the process of agricultural production. It has been proven that the restoration of the agro-food chain will take place in the event that it includes enterprises for cultivation (fattening), processing, transportation, storage and sale of agricultural products.

CONCLUSIONS FROM THE CONDUCTED RESEARCH. The restoration of broken agro-food chains and the inclusion of domestic agricultural enterprises in global agro-food chains will contribute to their accelerated recovery, reducing the level of costs for production, transportation, storage, processing and sale of agricultural products; accelerating the recovery of agricultural enterprises due to the joint interaction of participants in agro-food chains; increasing the level of quality of agricultural products.

KEYWORDS: agro-industrial sector; agriculture; agro-food chains; global agro-food chains; post-war recovery.

NUMBER OF REFERENCES	NUMBER OF FIGURES	NUMBER OF TABLES
20	0	1

JEL Classification:
O13; Q1

УДК 338.631(477)

DOI: 10.30857/2415-
3206.2023.2.6

ПЕРСПЕКТИВИ РОЗВИТКУ АГРОПРОМИСЛОВОГО СЕКТОРУ УКРАЇНИ В УМОВАХ ПІСЛЯВОЄННОГО ВІДНОВЛЕННЯ

Наталія ГАВКАЛОВА¹

¹Харківський національний економічний університет
ім. С. Кузнеця, Україна

МЕТОЮ ДАНОЇ СТАТТІ є визначення перспективних напрямів розвитку агропромислового сектору України в умовах післявоєнного відновлення.

МЕТОДИ ДОСЛІДЖЕННЯ. В процесі написання статті використано загальнонаукові та спеціальні методи дослідження агропромислового сектору, серед яких: індукції та дедукції; структурно-логічного аналізу; екстраполяції; таблично-графічний.

ВИКЛАД ОСНОВНОГО МАТЕРІАЛУ ДОСЛІДЖЕННЯ. В статті визначено, що агропромисловий сектор є одним з ключових секторів економіки країни, який до війни створював значний внесок у ВВП країни. З початком війни агропромисловий сектор зазнав значних збитків і потребує відновлення та подальшого розвитку. Визначено перспективні шляхи розвитку агропромислового сектору, які можуть здійснюватися в трьох ключових напрямках: активізація власних резервів сільськогосподарських підприємств; отримання донорської міжнародної допомоги; розробка державної аграрної політики післявоєнного відновлення. Доведено, що відновлення розірваних агропродовольчих ланцюгів та включення вітчизняних сільськогосподарських підприємств до глобальних агропродовольчих ланцюгів є перспективним напрямом розвитку агропромислового сектору

країни. З'ясовано, що агропродовольчий ланцюг – це сукупність взаємозалежних підприємств, які об'єдналися на добровільних засадах і тісно співпрацюють в процесі виробництва сільськогосподарської продукції. Доведено, що відновлення агропродовольчого ланцюга відбудеться у разі, коли до його складу увійдуть підприємства з вирощування (відгодівлі), переробки, транспортування, зберігання та продажу сільськогосподарської продукції.

ВИСНОВКИ З ПРОВЕДЕНОГО ДОСЛІДЖЕННЯ. Відновлення розірваних агропродовольчих ланцюгів та включення вітчизняних сільськогосподарських підприємств до глобальних агропродовольчих ланцюгів сприятиме їх прискореному відновленню, зменшенню рівня витрат на виробництво, транспортування, зберігання, переробку та продаж сільськогосподарської продукції; прискоренню відновлення сільськогосподарських підприємств за рахунок спільної взаємодії учасників агропродовольчих ланцюгів; підвищенню рівня якості сільськогосподарської продукції.

КЛЮЧОВІ СЛОВА: агропромисловий сектор; сільське господарство; агропродовольчі ланцюги; глобальні агропродовольчі ланцюги; післявоєнне відновлення.

Statement of the problem. The agro-industrial sector is one of the key sectors that provide a significant contribution to the development of the country's economy. Before the war, the agro-industrial sector of Ukraine "was characterized by positive development dynamics, high export potential on the world market, which contributed to the solution of food security at the national and global levels" (Vdovenko, 2022) and produced 10% of the country's GDP, provided 41% of the total export of agricultural products and provided jobs for 14% of the working population (DLF, 2023). The growth of the industry was 5–6% per year (Economics.org.ua, 2023). As a result of the war, the agro-industrial sector suffered colossal losses in the amount of more than 8.7 billion US dollars. Domestic agricultural enterprises have encountered significant problems and obstacles in their functioning, which require urgent solutions to restore their activities and ensure further development.

Analysis of recent publications on the problem. The study of the state and prospects for the development of the agro-industrial sector of the country is devoted works of such scientists as: M. Bilykh, V. Bondarenko, L. Vdovenko, Y. Hontaruk, A. Dunska, Yu. Kashirna, B. Kosovich, A. Kyretiv, I. Kostenko, M. Negerey, S. Pasko, P. Povroznyk, A. Taranenko, V. Tkach.

The problems of the formation and development of agro-food chains at the national and global levels are devoted to the work of such domestic scientists as: P. Antonyuk, O. Borodina, O. Varchenko, O. Gudenko, O. Krupelnyska, T. Lozova, N. Maievskaya, S. Petrukha, N. Petrukha, G. Ryzhakova and foreign scientists, including: P. Beske, J. Christien, O. Huirne, A. Land, J. Ondersteijn, S. Seuring, R. Wijnands. However, their works reveal the problems and prospects of the development of the agro-industrial sector in the pre-war period. The problem of recovery and development of the agro-industrial sector in the conditions of post-war recovery is new and requires in-depth research with the development of new methods and tools that can be applied to intensify the post-war recovery of the agro-industrial sector.

Statement of the main results and rationale. Since the beginning of the war, the agro-industrial sector suffered total losses in the amount of 8.7 billion US dollars, which is 5.8% of the total losses of the country's economy (Focus, 2023). According to the State Statistics Service, in 2022 compared to 2021, the collection of grain fell by 37.4%, vegetables – by 25%, fruits – by 10% (Visituukraine.today, 2023). During this period, there was a 20% reduction in the sown area (DLF, 2023), as a result of which more than 32 million tons of grain harvest was not obtained in 2022. The hostilities and occupation of part of the country's territory resulted in the loss of up to 80% of the harvest in the Donetsk, Luhansk and Zaporizhia regions; in the Kharkiv, Odesa, Mykolaiv and Vinnytsia regions, up to 50% of the harvest was lost. Enterprises of the agro-industrial sector suffered damage to production buildings, structures and

granaries in the amount of 1.33 billion US dollars; equipment and machinery for the production of agricultural products in the amount of 4.65 billion US dollars (Focus, 2023). At the same time, mine contamination of 400,000 hectares of agricultural land located in the combat zone affected the decrease in the amount of cultivated land (DLF, 2023).

Established agri-food chains were broken, which made it difficult to deliver agricultural products to domestic and foreign consumers. If before the war 90% of agricultural exports passed through the Black Sea ports of Ukraine, in 2022, when the ports were blocked, grain exports fell from 5.4 million tons at the beginning of the year to 0.3 million tons in March (DLF, 2023). Due to the specificity of their activities, most of the enterprises of the agro-industrial sector cannot relocate their business to safe regions of the country and are forced to suspend their activities, as a result of which the so-called "abandoned lands" were formed, the owners of which temporarily moved abroad for their safety. In addition, the development of the activities of enterprises in the agro-industrial sector of the country is hindered by such problems as: "opacity of land relations; non-compliance with international quality and safety standards; low level of investment; unadapted legislative acts of Ukraine to EU requirements; the problem of market redistribution in market independence; increased dependence on state funding; low level of innovative activity; imperfect logistics" (Nehrey et al., 2022), as well as difficulty in accessing the necessary resources (vaccines, fodder, equipment); restrictions on the use of fertilizers, pesticides, seeds supplied from abroad; loss of buyers of agricultural products who, because of the war, are unable to purchase products in pre-war volumes; difficulties in finding new customers; impossibility of expansion of sales markets.

In order to overcome the above-mentioned problems of the development of the agro-industrial sector, a number of promising measures for its restoration should be implemented, both at the micro- and macro-levels. To restore the agro-industrial sector A.R. Dunska and M.S. Bilykh propose to use "two main non-equivalent sources. First of all, it is a source with limited possibilities – the use of own reserves, including the investments involved, by agricultural companies. Secondly, donor international aid, which will be provided by the programs of the European Union, aimed at the assistance and adaptation of candidate states to become EU members" (Dunska and Bilykh, 2022). However, the mentioned two directions will not be effective enough without the formation of the appropriate state agrarian policy for the post-war recovery of the agro-industrial sector.

The strategic goals of the restoration of the agro-industrial sector for 2022–2024, developed by the Ministry of Agrarian Policy and Food of Ukraine, are recognized:

- food safety;

- provision of stimulating and advisory agrarian policy;
- providing market players with quality infrastructure
- creation of conditions for manufacturers regarding the possibility of providing available material and technical resources;
- ensuring the production and export of safe and healthy agricultural and food products;
- balancing the production of high- and low-margin products to increase the profitability of the sector;
- stimulating the production of products with high added value to meet domestic needs and increase exports;
- creation of new production capacities through stimulation of innovative activities of enterprises in all regions of the country using the competitive advantages of each of them;
- ensuring sustainable use of aquatic biological resources;
- effective transparent management and regulation in the field of land relations;
- financial stability of agricultural producers (Ministry of Agrarian Policy and Food of Ukraine, 2022).

To restore the agro-industrial sector, as N.S. Vdovenko notes, the following measures will be effective:

- creation of an alternative logistics network for the export of agricultural products through the seaports of other countries (Romania, Bulgaria) and modernization of the railway connection and its wide use;
- minimization of bureaucratic procedures for enterprises of the agricultural sector (requests from manufacturers to obtain the necessary licenses and certificates);
- regulation of price policy regarding means of agro-industrial production;
- free access to factors of production and sales of all subjects of agrarian business;
- expansion of bank lending programs for small and medium-sized businesses under conditions acceptable to farmers;
- use of foreign investors' funds for the development and restoration of the agricultural sector (Vdovenko, 2022).

M. Nehrey, A. Taranenko and I. Kostenko include such measures:

- reduction of bureaucratic barriers for the development of agricultural enterprises;
- development and implementation of a set of measures to create new jobs and develop the social infrastructure of rural areas;
- adaptation of the production of the agricultural sector of Ukraine to the requirements of the European Union;

- support of small farming, assistance to retailers for internal procurement of fruits and vegetables;
- technological development and digitalization of the agricultural sector;
- development of processing in the agricultural sector in accordance with the principles of the Green Deal;
- creation of conditions for the transition of the agricultural sector to sustainable production;
- involvement of highly qualified personnel in the agricultural sector (managers, IT specialists, scientists and narrow-profile agricultural specialists);
- improving the quality of product safety in accordance with the requirements of international standards, including the development of measures to improve the quality of citizens' products (Nehrey et al., 2022).

"Strengthening of state regulation regarding the financial condition of enterprises, which should be aimed at creating cost-effective agro-industrial production, deepening the degree of processing and improving the storage of agricultural products", as noted by V. Tkach and Yu. Kashirna, is an active direction for the recovery of the agro-industrial sector (Tkach and Kashirna, 2013).

The search and implementation of "innovations that will be effective in the conditions of war and post-war recovery of the country", according to B.I. Kosovich, P.P. Povrozhnyk and A.Ya. Kiretova, is the key direction of accelerating the recovery of the agro-industrial sector. The authors believe that it is "innovative approaches and technologies, new quality of work, innovative developments and inclusive solutions that will reduce costs, increase productivity and profitability of agricultural production, which will strengthen not only food security of Ukraine, but also economic security" (Kosovych et al., 2022). The innovative technologies that should be implemented for the restoration and development of the agro-industrial sector of the country, as noted by S.M. Pasko, include the following: "safe genetic engineering of seed material; zero flow hydrosystem fishing; tray-condensate irrigation systems; computer management of livestock; bioinsecticides and pollinators; cocoon-sleeve granaries; precision seeding technologies; "smart" greenhouses; Craft Scanner sensors for monitoring the depth of tillage; aeroponic farms (growing plants without soil) and other technologies" (Pasko, 2022). However, the introduction of innovations requires attracting additional investments in the renewal of production, without which further development of the agro-industrial sector is impossible (Bondarenko and Gontaruk, 2021).

The introduction of modern agricultural technologies (Ag Tech technologies) will also contribute to faster recovery and development of the agro-industrial sector. "Transition to more environmentally friendly green technologies and focus on sustainable agriculture", as noted by S. Reznichenko,

head of agronomy and technology development of the company "Corteva Agriscience", will contribute to increasing soil fertility, reducing emissions into the atmosphere, reducing the amount of fertilizers, introducing innovative means of plant protection, which in turn will ensure a faster recovery of agricultural production, lower costs and increase the competitiveness of the agro-industrial sector (Skrypnyk, 2023).

At the same time, the implementation of the above-mentioned measures of post-war reconstruction and development of the agro-industrial sector will not be effective enough without the restoration of broken agro-food chains. A generalization of the views of domestic and foreign scientists regarding the essence of the concept of "agro-food chain" is given in Table 1.

Table 1

The essence of the concept of "agri-food chain"

Author	Definition of the term "agri-food chain"
O. Borodina	mutually beneficial relationships between groups of producers, sellers, processors and service companies that join together to increase productivity and create added value based on an understanding of mutual benefit and fair distribution of the achieved result (Borodina, 2014)
O. Varchenko	the process through which the final product (food) is created for sale to consumers, that is, the purposeful movement of a product from its constituent parts to the manufacture of a finished product (Varchenko, 2019)
N. Majevska	an integrated approach to the creation of added value based on the realization of the economic interests of each of its participants (Majevska, 2022)
FAO	a set of agricultural producers and organizations that consistently and coordinatedly ensure the creation of added value from the production of specific types of agricultural products and their processing in order to obtain food products that are sold to the final consumer and after consumption are sent to waste, ensuring profitability at each stage, creating broad benefits for society without permanent depletion of natural resources (FAO, 2014)
P. Beske, A. Land, S. Seuring	a set of interdependent companies that work closely together to exert a targeted influence on the flow of goods and services along the entire value chain of agricultural and food products, which will ensure that this flow is brought to consumers at the lowest possible cost (Beske et al., 2014)
J.M. Christien et al.	activities that cover the stages from production to distribution, which ensures the delivery of products to final consumers (Christien et al., 2006)

Source: summarized by the author.

Taking into account the above-mentioned approaches, the agro-food chain, according to the author's definition, should be understood as a set of interdependent enterprises that have united on a voluntary basis and closely cooperate in the production of agricultural products. The agro-food chain will be formed when it will include enterprises for cultivation (fattening), processing, transportation, storage and sale of agricultural products, that is, those that will

fully ensure the full cycle of agricultural production. As Antonyuk P. O. and Lozova T. P. note, the restoration of domestic agro-food chains should take place in the direction of "the formation in the region of completed agro-food chains of final products with high added value, which, in turn, involves stimulating the processing of raw materials and the production of domestic food products for satisfaction of dynamic consumer demand, activation of the activities of subjects of processing sectors of commodity markets, creation of additional jobs, effective use of the potential of regional economic systems" (Antonyuk, Lozova, 2022). To evaluate the effectiveness of the creation and restoration of agro-food chains, the AVACS method should be used, proposed in the research of Ryzhakova G. The AVACS method is "a fast food market evaluation method between in-depth value chain analysis (VCA) and sub-sector analysis (SSA); action research (AR); monitoring of local business support centers (BSC). The AVACS method makes it possible to identify the positions of agricultural producers on the food market and in the chain of added value of agro-food products" (Ryzhakova *et al.*, 2022).

The restoration of broken domestic agro-food chains and the inclusion of domestic producers of agricultural products in global agro-food chains, which are a key element of world trade, will contribute to the faster recovery of the country's agro-industrial sector. Thus, to date, the restoration of agro-food chains by finding alternative routes for the delivery of agricultural products has made it possible to increase the export of grain from 1.2 million tons in April to 2.7 million tons in June 2023. The introduction of the Black Sea Grain Initiative made it possible to increase grain exports to 6-7 million tons per month starting in July (DLF, 2023). More than 30% of agricultural products are exported abroad through global agri-food chains.

Conclusions and prospects for further research. Since the beginning of the war, the domestic agro-industrial sector suffered great losses due to the reduction of harvest volumes, the reduction of cultivated areas, the emergence of "abandoned lands", the destruction of production complexes and equipment. To restore the agro-industrial sector, domestic scientists have developed a number of different measures in three key directions: activation of own reserves of agricultural enterprises; receiving donor international aid; development of the state agrarian policy for the post-war recovery of the agro-industrial sector. The most effective direction is the restoration of broken agro-food chains and the inclusion of domestic agricultural enterprises in global agro-food chains. This will contribute to reducing the level of costs associated with the production, transportation, storage, processing and sale of agricultural products; accelerating the recovery of agricultural enterprises due to the joint interaction of participants in agro-food chains; increasing the level of quality of agricultural products.

REFERENCES:

- DLF (2023). Ahrosektor Ukrainy: vplyv viiny ta perspektyvy vidnovlennia [The agricultural sector of Ukraine: the impact of the war and prospects for recovery]. URL: <https://dlf.ua/ua/agrosektor-ukrayini-vplyv-vijni-ta-perspektivi-vidnovlennia/> [in Ukrainian].
- Antoniuk, P., Lozova, T. (2022). Adaptivni zakhody selektyvnoho rehuliuвання ahroprodovolchych rynkiv Odeskoho rehionu v umovakh nestabilnosti [Adaptive measures of selective regulation of agro-food markets of the Odesa region in conditions of instability]. *Ekonomika kharchovoi promyslovosti = Economics of the food industry*, Vol. 14, Iss. 1, P. 25–36. URL: <https://journals.ontu.edu.ua/index.php/fie/article/download/2266/2452/> [in Ukrainian].
- Bondarenko, V., Hontaruk Ya. (2021). Analiz stanu ta perspektyv rozvytku APK Ukrainy [Analysis of the state and prospects for the development of the agricultural industry of Ukraine]. *Problemy ta perspektyvy ekonomiky ta upravlinnia = Problems and prospects of economics and management*, No. 2 (26), 86–98. URL: <http://ppeu.stu.cn.ua/article/view/244057/242097> [in Ukrainian].
- Borodina, O. (2014). Intehratsiia dribnykh silskohospodarskykh vyrobnykiv do ahroprodovolchych lantsiuhiv dodanoi vartosti: metodolohichni pidkhody ta empirychni doslidzhennia [Integration of small-scale agricultural producers into agri-food value-added chains: methodological approaches and empirical studies]. *Ekonomika i prohnozuvannia = Economics and forecasting*, No. 2, P. 73–84 [in Ukrainian].
- Varchenko, O. (2019). Teoretychni aspekty funktsionuvannia ahroprodovolchych lantsiuhiv ta osoblyvostei yikh rozvytku v Ukraini [Theoretical aspects of the functioning of agro-food chains and features of their development in Ukraine]. *Ekonomika ta upravlinnia APK = Economy and management of agriculture*, No. 1, P. 6–20. URL: https://econommeneg.btsau.edu.ua/sites/default/files/visnyky/ekonomika/varchenko_o.1-2019.pdf [in Ukrainian].
- Vdovenko, L. (2022). Інструменти державної фінансової підтримки аграрного сектора в умовах воєнного стану [Instruments of state financial support of the agricultural sector in the conditions of martial law]. *Економіка та суспільство = Economy and society*, Vol. 44. URL: <https://doi.org/10.32782/2524-0072/2022-44-82> [in Ukrainian].
- Economics (2023). Vplyv viiny na stan ahrarnoi haluzi [The impact of the war on the state of the agricultural industry]. URL: <https://economics.org.ua/images/Analitika-agro-sector2023.pdf> [in Ukrainian].
- Dunska, A., Bilykh M. (2022). Stratehichni perspektyvy rozvytku APK Ukrainy na mizhnarodnomu rynku [Strategic prospects for the development of the agricultural industry of Ukraine on the international market]. *Visnyk KhNTU = KhNTU Bulletin*, No. 2 (81), P. 113–177. URL: https://journals.kntu.kherson.ua/index.php/visnyk_kntu/article/view/55/50 [in Ukrainian].
- Kosovych, B., Povrozyk, P., Kyretiv, A. (2022). Innovatsii, yak skladova formuvannia prodovolchoi bezpeky Ukrainy [Innovations as a component of the formation of food security of Ukraine]. *Derzhava ta rehiony. Serii: Ekonomika ta pidpriemnytstvo = State and regions. Series: Economy and entrepreneurship*, No. 3 (126), P. 80–85. URL: http://www.econom.stateandregions.zp.ua/journal/2022/3_2022/14.pdf [in Ukrainian].
- Maievska, N. (2022). Transformatsiia ahroprodovolchych lantsiuhiv v konteksti viiny v Ukraini [Transformation of agro-food chains in the context of the war in Ukraine]. *Infrastruktura rynku = Market infrastructure*, No. 69, P. 91–98. URL: http://www.market-infr.od.ua/journals/2022/69_2022/18.pdf [in Ukrainian].
- Focus (2023). Miliardy dolariv: u KSE otsynily zbytky ahrarnoho sektora vid viiny v Ukraini [Billions of dollars: the KSE estimated the losses of the agricultural sector from the

war in Ukraine]. URL: <https://focus.ua/uk/economics/561796-milyardi-dolariv-u-kse-ocinili-zbitki-agrarnogo-sektora-vid-vijni-v-ukrayini> [in Ukrainian].

Ministry of Agrarian Policy and Food of Ukraine (2022). Pro zatverdzhennia Stratehichnoho planu roboty ministerstva aharnoï polityky ta prodovolstva ukrainy na 2022–2024 roky: Nakaz Ministerstva aharnoï polityky ta prodovolstva Ukrainy vid 28.06.2022 № 389 [On the approval of the Strategic Work Plan of the Ministry of Agrarian Policy and Food of Ukraine for 2022–2024: Order of the Ministry of Agrarian Policy and Food of Ukraine dated June 28, 2022 No. 389]. URL: <https://minagro.gov.ua/npa/pro-zatverdzhennya-strategichnogo-planu-roboti-ministerstva-agrarnoyi-politiki-ta-prodovolstva-ukrayini-na-2022-2024-roki> [in Ukrainian].

Neherei, M., Taranenko, A., Kostenko, I. (2022). Ahraryi sektor Ukrainy v umovakh viiny: problemy ta perspektyvy [The agricultural sector of Ukraine in the conditions of war: problems and prospects]. *Ekonomika ta suspilstvo = Economy and society*, Vol. 40. URL: <https://doi.org/10.32782/2524-0072/2022-40-38> [in Ukrainian].

Pasko, S. (2022). Stan ta perspektyvy rozvytku ahrarynoho sektoru ekonomiky Ukrainy [The state and prospects for the development of the agrarian sector of the economy of Ukraine]. *Naukovyi visnyk Uzhhorodskoho natsionalnoho universytetu = Scientific Bulletin of the Uzhhorod National University*, No. 42, P. 171–176. URL: http://www.visnyk-econom.uzhnu.uz.ua/archive/42_2022ua/32.pdf [in Ukrainian].

Ryzhakova, H., Petrukha, S., Petrukha, N., Krupelnytska, O., Hudenko, O. (2022). Ahroprodovolchi lantsiuihy dodanoi vartosti: metodolohiia, tekhnika ta arkhitektura [Agri-Food Value Added Chains: Methodology, Techniques and Architecture]. *Financial and Credit Activity Problems of Theory and Practice*, No. 4(45), P. 385–395. URL: <https://doi.org/10.55643/fcaptp.4.45.2022.3809> [in Ukrainian].

Tkach, V., Kashyrna, Yu. (2013). Problemy ta perspektyvy rozvytku APK v umovakh hlobalizatsii [Problems and prospects of agro-industrial complex development in the conditions of globalization]. URL: <http://oldconf.neasmo.org.ua/node/2643> [in Ukrainian].

Skrypnyk, V. (2023). Chy mozhlyvyi zelenyi perehid dlia ahrarynoho sektoru Ukrainy v umovakh viiny ta pisliavoiennoi vidbudovy – ekspertna dumka spetsialista kompanii Corteva Agriscience [Is a green transition possible for the agricultural sector of Ukraine in the conditions of war and post-war reconstruction – expert opinion of Corteva Agriscience specialist]. URL: <https://ukraine-oss.com/chy-mozhlyvyj-zelenyj-perehid-dlya-agrarnogo-sektoru-ukrayiny-v-umovah-vijny-ta-pislyavoyennoyi-vidbudovy-ekspertna-dumka-speczialista-kompaniyi-corteva-agriscience/> [in Ukrainian].

Beske, P., Land, A., Seuring, S. (2014). Sustainable supply chain management practices and dynamic capabilities in the food industry: A critical analysis of the literature. *International Journal of Production*. Vol. 152. P. 131–143.

Christien, J. M., Ondersteijn, Jo H. M., Wijnands, Ruud B. M., Huirne, Olaf van Kooten (2006). Quantifying the Agri-Food Supply Chain. Wageningen UR Frontis Series. Vol. 15. 244 p.

FAO (2014). Developing sustainable food value chains – Guiding principles. Rome. URL: www.fao.org/3/a-i3953e.pdf.

AUTHOR (S) BIOSKETCHES



Gavkalova Natalia, D.Sc in Economics, Professor, Head of the Department of Public Administration, Public Administration and Economic Policy, Simon Kuznets Kharkiv National University of Economics, Ukraine

<https://orcid.org/0000-0003-1208-9607>

Scopus Author ID: 56328233300

ResearcherID: U-6771-2017

E-mail: ngavl@ukr.net

COPYRIGHTS

©2023 The author(s). This is an open access article distributed under the terms of the Creative Commons Attribution (CC BY 4.0), which permits unrestricted use, distribution, and reproduction in any medium, as long as the original authors and source are cited. No permission is required from the authors or the publishers.

HOW TO CITE THIS ARTICLE

Gavkalova, N. (2023). Prospects for the development of the agricultural sector of Ukraine in the conditions of post-war recovery. *Management*, 2(38): 74–84.
<https://doi.org/10.30857/2415-3206.2023.2.6>.

JEL Classification:
L41, Z33

UDC 330.341

DOI: 10.30857/2415-
3206.2023.2.7

THE IMPORTANCE OF MARKETING INNOVATIONS AS THE BASIS OF MANAGEMENT OF THE ENTERPRISE'S COMPETITIVENESS

Olena IEVSEITSEVA¹, Oleksandr MIHALATII¹

¹ Kyiv National University of Technologies and Design,
Ukraine

THE PURPOSE OF THE ARTICLE is to establish the importance and relevance of marketing innovations in the company's activities and to determine their impact on managing the competitiveness of business entities as a whole.

RESEARCH METHODS. Various methods were used to research marketing innovations and competitiveness: analysis of special literature and views of scientists; methods of empirical research; method of abstraction, grouping and illustration; method of system analysis, etc. The use of these methods can be comprehensive for the best study of marketing innovations and management of competitiveness in the activities of various enterprises.

PRESENTING MAIN MATERIAL. It has been established that the relevance and importance of marketing innovations is constantly growing in the conditions of a rapidly changing business environment, where new technologies, changes in consumer habits, competitive pressure and other factors require stakeholders to constantly adapt and introduce innovations into the marketing strategies of business entities. In the conditions of rapid changes in the market and the growing complexity of the business environment, marketing innovation is becoming a key tool for achieving success and sustainability of companies. Companies that actively innovate in their marketing usually have a better chance of attracting consumer attention and staying competitive. Marketing innovations are innovative approaches and strategies in the field of marketing aimed at attracting the attention of consumers, improving the competitiveness of a product or brand, as well as optimizing marketing processes. Marketing innovations can vary depending on the industry, the market and the specifics of the business, helping the company to take a stronger position in the market and provide a competitive advantage. Competitiveness management requires continuous improvement of products, processes, communications and strategies to meet changes in demand, technology and consumer preferences. The importance of marketing innovations in managing the

competitiveness of the enterprise is manifested in the following positive aspects: understanding of the market and customers; development of products and services; effective marketing; increasing the efficiency of operations; interaction with clients; adaptation to changes in market conditions.

CONCLUSIONS. Because of the conducted theoretical research, we established that marketing innovations are the introduction of innovative approaches, strategies, tools or technologies into the marketing activities of the enterprise with the aim of improving performance, attracting the attention of customers and ensuring competitive advantages. The main goal of marketing innovation is to introduce innovations in marketing, meet the changing needs of consumers and optimize interaction with the audience. Marketing innovation has been found to be an important factor in a competitive environment, as it allows companies to adapt to a rapidly changing market and provide sustainable competitive advantages. The ability to adapt to new trends and implement innovations can be a key element of success in modern business and increasing the competitiveness of an enterprise. Effective implementation of marketing innovations allows you to adapt to dynamic market changes, satisfy customer needs as much as possible and manage the competitiveness of the enterprise more effectively. It was established that it is important for the enterprise not only to introduce new ideas, but also to constantly adapt its strategy in accordance with changes in market conditions and customer requirements. It was determined that the effectiveness of marketing innovations for the enterprise depends on: the growth of profitability; customer satisfaction; market share; innovative competitiveness; investments in marketing; speed of implementation; employee engagement.

KEYWORDS: marketing innovations; competitiveness management; business environment; company success; consumers; optimization of marketing processes; competitive advantages; innovative approaches; adaptation to changes.

NUMBER OF REFERENCES	NUMBER OF FIGURES	NUMBER OF TABLES
25	1	1

JEL Classification:
L41, Z33

УДК 330.341

DOI: 10.30857/
2415-3206.
2023.2.7

ВАЖЛИВІСТЬ МАРКЕТИНГОВИХ ІННОВАЦІЙ ЯК ОСНОВА УПРАВЛІННЯ КОНКУРЕНТО- СПРОМОЖНІСТЮ ПІДПРИЄМСТВА

Олена Євсейцева¹, Олександр МІГАЛАТІЙ¹

¹Київський національний університет технологій та
дизайну, Україна

МЕТОЮ СТАТТІ є встановлення важливості та актуальності маркетингових інновацій в діяльності підприємства та визначення їх впливу на управління конкурентоспроможністю діяльності суб'єктів підприємництва в цілому.

МЕТОДИ ДОСЛІДЖЕННЯ. Для дослідження маркетингових інновацій та конкурентоспроможності було використано різноманітні методи: аналіз спеціальної літератури та поглядів науковців; методи емпіричних досліджень; метод абстракції, групування та ілюстрації; метод системного аналізу та ін. Використання цих методів може бути комплексним для найкращого вивчення маркетингових інновацій та управління конкурентоспроможністю в діяльності різних підприємств.

ВИКЛАД ОСНОВНОГО МАТЕРІАЛУ.

Встановлено, що актуальність та важливість маркетингових інновацій постійно зростає в умовах швидкозмінного бізнес-середовища, де нові технології, зміни в споживачьких звичках, конкурентний тиск та інші чинники вимагають від стейкхолдерів постійного адаптування та впровадження інновацій у маркетингові стратегії діяльності суб'єктів господарювання. В умовах швидких змін на ринку та зростаючої складності бізнес-середовища, маркетингові інновації стають ключовим інструментом для досягнення успіху та стійкості компаній. Компанії, які активно впроваджують інновації в маркетингу, зазвичай мають кращі шанси привертати увагу споживачів та залишатися конкурентоспроможними. Маркетингові інновації – це новаторські підходи та стратегії в галузі маркетингу, спрямовані на залучення уваги споживачів, покращення конкурентоспроможності продукту чи бренду, а також оптимізацію маркетингових процесів. Маркетингові інновації можуть варіювати в залежності від галузі, ринку та специфіки бізнесу, допомагаючи компанії займати більш сильну позицію на ринку та забезпечити конкурентні переваги. Управління конкурентоспроможністю вимагає постійного вдосконалення продуктів, процесів, комунікацій та стратегій, щоб відповідати змінам у попиті, технологіях і побажаннях споживачів. Важливість маркетингових

інновацій в управлінні конкурентоспроможністю підприємства проявляється в таких позитивних аспектах: розуміння ринку і клієнтів; розвиток продуктів і послуг; ефективний маркетинг; збільшення ефективності операцій; взаємодія з клієнтами; адаптація до змін ринкових умов.

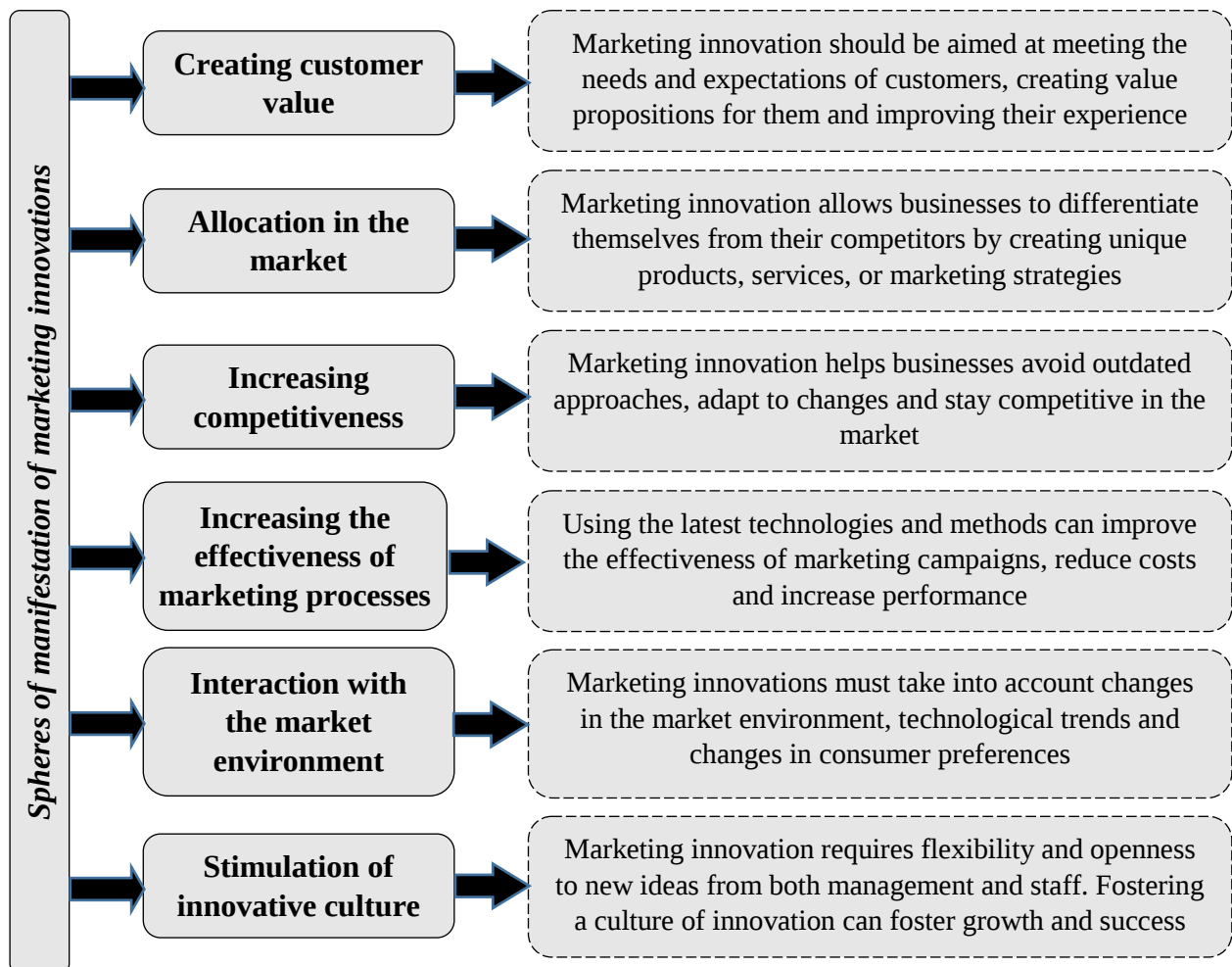
ВИСНОВКИ. В результаті проведеного теоретичного дослідження нами було встановлено, що маркетингові інновації – це впровадження новаторських підходів, стратегій, інструментів або технологій в маркетингову діяльність підприємства з метою покращення результативності, залучення уваги клієнтів та забезпечення конкурентних переваг. Головна мета маркетингових інновацій полягає в тому, щоб впроваджувати інновації в маркетинг, задовольняти мінливі потреби споживачів та оптимізувати взаємодію з аудиторією. Встановлено, що маркетингові інновації є важливим фактором у конкурентному середовищі, оскільки вони дозволяють компаніям адаптуватися до швидко змінного ринку та забезпечити стійкі конкурентні переваги. Здатність адаптуватися до нових тенденцій та впроваджувати інновації може бути ключовим елементом успіху в сучасному бізнесі та підвищенні конкурентоспроможності підприємства. Ефективна імплементація маркетингових інновацій дозволяє пристосовуватися до динамічних ринкових змін, максимально задовольняти потреби клієнтів та ефективніше управляти конкурентоспроможністю підприємства. Встановлено, що важливо, щоб підприємство не тільки впроваджувало нові ідеї, але й постійно адаптувало свою стратегію відповідно до змін в ринкових умовах і вимогах клієнтів. Визначено, що ефективність маркетингових інновацій для підприємства залежить від: зростання прибутковості; задоволення клієнтів; ринкової частки; інноваційної конкурентоспроможності; інвестицій в маркетинг; швидкості впровадження; залучення співробітників.

КЛЮЧОВІ СЛОВА: маркетингові інновації; управління конкурентоспроможністю; бізнес-середовище; успіх компанії; споживачі; оптимізація маркетингових процесів; конкурентні переваги; новаторські підходи; адаптація до змін.

Statement of the problem. Marketing innovation is defined as the implementation of innovative approaches, strategies, tools or technologies in the marketing activities of the enterprise with the aim of improving performance, attracting the attention of customers and providing competitive advantages. The main idea is to innovate in marketing to stand out from the competition, meet the changing needs of consumers and optimize the interaction with the audience. Marketing innovation is an important factor in a competitive environment because it allows companies to adapt to a rapidly changing market and provide a sustainable competitive advantage. The ability to adapt to new trends and innovate can be a key element of success in today's business.

Analysis of publications on the problem. Marketing in the management of innovative activities of enterprises and the general foundations of marketing innovations used in the management and sustainable provision of competitiveness of various business entities have been in the scientific focus of many researchers for quite a long time, among them in particular: V. Artemchuk, O. Boiko, T. Burtseva, I. Hanzhala, A. Hatsko, I. Hnatenko, O. Holodniuk, L. Dzhemelinska, Yu. Zaitsev, O. Zaiats, A. Kazarian, V. Karpenko, O. Kovalenko, N. Kolodnenko, O. Krasnorutskyi, T. Kuznietsova, N. Lemeshchenko, I. Lorvi, L. Luferenko, T. Maiboroda, O. Martyn, V. Morokhova, O. Nechyporenko, Yu. Nosenko, T. Palonna, O. Parokhnenko, K. Pidvalna, N. Prokopenko, V. Razvodovska, L. Sinelnyk, L. Sipailo, I. Taranenko, N. Tarnavska, L. Telyshevska, V. Shumkova, O. Shumkova and others. However, it requires additional in-depth attention to determine the relevance and importance of marketing innovations as a fundamental factor in managing the competitiveness of the enterprise in today's market conditions.

Statement of the main results. Marketing innovation is the process of introducing new ideas, concepts, products or methods into a company's marketing strategy in order to increase its competitiveness, efficiency and value for consumers. The essence of marketing innovation lies in the creation and implementation of unique approaches that distinguish the company from competitors and contribute to the attraction and retention of customers (Dzhemelinska, 2012; Hanzhala et al., 2017; Karpenko, 2019; Kazarian, 2013). Marketing innovations are a key element of the company's success in the conditions of constant change and development of the business environment, where their implementation allows companies to adapt to new conditions, satisfy customer needs and ensure sustainability in a competitive environment. The essence of the concept of marketing innovation is manifested through the following main directions (Fig. 1) (Krasnorutskyi et al., 2018; Yevseitseva, 2016; Kramar & Puzyrova, 2019).



Source: built by the authors on the basis of (Krasnorutskiy et al., 2018; Yevseitseva, 2016; Kramar & Puzyrova, 2019).

Fig. 1. Actual spheres of manifestation of marketing innovations in modern economy

The relevance and importance of marketing innovations is constantly growing in the conditions of a rapidly changing business environment, where new technologies, changes in consumer habits, competitive pressure and other factors require stakeholders to constantly adapt and introduce innovations into the marketing strategies of business entities. From yes, the importance and importance of marketing innovations is as follows (Kuznietsova & Sipailo, 2017; Luferenko, 2016; Martyn et al., 2022; Yevseitseva, 2017):

- technological progress – thanks to the rapid development of technologies, new opportunities arise for interaction with customers, increasing the effectiveness of advertising campaigns and creating innovative products and services;

- changes in consumer habits of customers – changes in consumer wishes and expectations challenge traditional marketing approaches. That is why

companies must look for new ways to attract attention and satisfy the needs of their customers as fully as possible;

- globalization of markets – conditions of globalization make necessary new marketing strategies for adaptation to various cultures and markets;

- competitive pressure – competition between companies is becoming more and more fierce, and in order to maintain or gain a competitive advantage, it is necessary to implement innovative marketing strategies;

- increasing importance of customer relations – in modern business, the importance of interaction and relations with customers is increasing, as the latest technologies allow personalized communication and provide new opportunities for building strong relations with customers;

- social and environmental trends – consumers are becoming more aware and demanding more responsibility from companies, where marketing innovations can help companies highlight their social and environmental responsibility;

- change in consumer habits – consumers are constantly changing their preferences and consumer habits. Marketing innovations allow businesses to adapt to these changes and provide products and services that meet current consumer needs;

- technological development – the development of technologies always creates new opportunities for marketing, where the use of artificial intelligence, data analytics, social networks, mobile platforms and other innovative technologies allows enterprises to interact more effectively with customers and involve them in interaction processes;

- competitive advantages – marketing innovations can become a source of competitive advantages for companies. The introduction of new and creative marketing strategies allows you to stand out among competitors and more effectively attract the attention of consumers;

- increasing the efficiency of activities – innovations in marketing also allow optimizing all processes and increasing the effectiveness of marketing campaigns through the use of automation, personalization and target marketing, which can improve the effectiveness of promotion strategies;

- involvement of the young generation – young people are an important segment of the market and they are inclined to adopt new technologies and innovations, which is why the development of marketing strategies aimed at young people allows companies to gain the loyalty of the young generation.

Therefore, in the conditions of rapid changes in the market and the growing complexity of the business environment, marketing innovation is becoming a key tool for achieving success and sustainability of companies (Morokhova et al., 2021; Nosenko et al., 2021; Prokopenko & Kovalenko, 2018; Puzyrova,

2020). Companies that actively innovate in their marketing usually have a better chance of attracting consumer attention and staying competitive. Marketing innovations are innovative approaches and strategies in the field of marketing aimed at attracting the attention of consumers, improving the competitiveness of a product or brand, as well as optimizing marketing processes. Among the main types of marketing innovations, we can highlight the following (Table 1).

Table 1

The main types of marketing innovations

Kinds	Essence
Digital Marketing	The use of Internet technologies, social networks, content marketing, SEO and other digital channels to promote products or services.
Marketing Automation	Using programs and tools to automate routine tasks of the marketing process, such as email newsletters, CRM, data analysis, etc.
Interactive marketing	Engaging consumers through interactive elements such as games, surveys, online content that encourages active participation
Proprietary Marketing	Development and branding of proprietary brands that provide a unique image and competitive advantage.
Marketing with artificial intelligence (AI)	Using AI to analyze data, personalize offers, predict trends and optimize advertising campaigns.
Environmental marketing	Emphasis on sustainable and environmentally friendly aspects of products or a brand that is in line with current trends in environmental conservation.
Social Media Marketing	Using social platforms to generate brand interest, engage with audiences, and increase awareness.
Influencer marketing	Engaging influencers or individuals with large audiences to promote a product or service.
Marketing experiments	Testing new ideas and strategies to find out their effectiveness before full implementation.

Source: built by the authors on the basis of (Taranenko, 2012; Yevseitseva et al., 2022; Puzyrova, 2011; Telyshevskaya et al., 2011).

Marketing innovations can vary depending on the industry, the market and the specifics of the business, helping the company to take a stronger position in the market and provide a competitive advantage. Competitiveness management requires continuous improvement of products, processes, communications and strategies to meet changes in demand, technology and consumer preferences. The importance of marketing innovations in managing the competitiveness of the enterprise is manifested in the following:

1. Understanding the market and customers. Marketing innovations allow businesses to better understand the needs and expectations of their customers. Analysis of the market and consumer trends helps to develop products and services that better meet demand.

2. Development of products and services. Continuous improvement or creation of new products and services allows enterprises to gain a competitive

advantage in the market. Product innovations may include new features, technologies or packaging that attract customers' attention.

3. Effective marketing. Using new and creative approaches to marketing allows businesses to stand out in the market. Modern marketing strategies, such as the use of social networks, content marketing and other digital tools, can significantly increase the effectiveness of advertising and product promotion.

4. Increasing the efficiency of operations. Marketing innovation is not limited to products or advertising, it can also include more efficient operational processes that allow a company to reduce costs and improve the quality of products or services.

5. Interaction with customers. The implementation of innovative methods of interaction with customers, such as loyalty programs, online support and personalized services, can significantly improve brand perception and ensure customer loyalty.

6. Adaptation to changes in market conditions. Marketing innovations help businesses respond more quickly to changes in economic conditions, competition, and other factors that may affect business.

In general, marketing innovations become an important tool for ensuring the competitiveness of the enterprise, allowing it not only to survive in the market, but also to develop and become leaders in its field (Razvodovska et al., 2021; Yevseitseva & Olshanska, 2023; Taranenko, 2015).

The overall effectiveness of marketing innovations for an enterprise depends on certain factors and can be evaluated by various indicators:

- profitability growth (one of the main indicators of the effectiveness of marketing innovations is an increase in the profitability of the enterprise. If new strategies or products lead to an increase in sales and profits, this can be considered a success);
- customer satisfaction (marketing innovations contribute to improving the quality of service, customer satisfaction and increasing their loyalty);
- market share (if the company gains more market share or maintains its position thanks to new strategies, this indicates success);
- innovative competitiveness (marketing innovations can help the enterprise stand out from competitors. Maintaining competitiveness and the ability to stand out among similar goods or services is a positive signal);
- investments in marketing (the cost estimate for marketing innovations is compared with the results obtained. If innovations lead to significant positive changes and the cost of their implementation is justified, it can be considered effective);
- speed of implementation (the speed of reaction to changes in market conditions can determine the success of marketing strategies);

– involvement of employees (it is also important to evaluate the level of involvement and support of employees in the implementation of marketing innovations, since their support can affect success).

Considering these aspects and analyzing them together, the company can evaluate the effectiveness of its marketing innovations (Shumkova et al., 2023; Tarnavska & Holodniuk, 2015; Yevseitseva & Subot, 2023).

Conclusions. Therefore, because of the conducted theoretical research, we established that marketing innovation is the introduction of innovative approaches, strategies, tools or technologies into the marketing activities of the enterprise with the aim of improving performance, attracting the attention of customers and ensuring competitive advantages. The main goal of marketing innovation is to introduce innovations in marketing, meet the changing needs of consumers and optimize interaction with the audience. Marketing innovation has been found to be an important factor in a competitive environment, as it allows companies to adapt to a rapidly changing market and provide sustainable competitive advantages. The ability to adapt to new trends and implement innovations can be a key element of success in modern business and increasing the competitiveness of an enterprise. Effective implementation of marketing innovations allows you to adapt to dynamic market changes, satisfy customer needs as much as possible and manage the competitiveness of the enterprise more effectively. It was established that it is important for the enterprise not only to introduce new ideas, but also to constantly adapt its strategy in accordance with changes in market conditions and customer requirements. It was determined that the effectiveness of marketing innovations for the enterprise depends on: the growth of profitability; customer satisfaction; market share; innovative competitiveness; investments in marketing; speed of implementation; employee engagement.

REFERENCES:

Dzhemelinska, L. V. (2012). Marketynh v upravlini innovatsiinoiu produktsiieiu yak odyin iz aspektiv zabezpechennia konkurentospromozhnosti pidpriemstva [Marketing in the management of innovative products as one of the aspects of ensuring the competitiveness of the enterprise]. *Biznes Inform = Business Inform*, No. 10, P. 244–248 [in Ukrainian].

Hanzhala, I. V., Palonna, T. A., Burtseva, T. I. (2017). Vykorystannia innovatsiinoho marketynhu yak zasobu pidvyshchennia konkurentospromozhnosti pidpriemstva [The use of innovative marketing as a means of increasing the competitiveness of the enterprise]. *Zbirnyk naukovykh prats Cherkaskoho derzhavnoho tekhnolohichnoho universytetu. Serii: Ekonomichni nauky = Collection of scientific works of the Cherkasy State University of Technology. Series: Economic sciences*, Issue 45(2), P. 76–81 [in Ukrainian].

Karpenko, V. L. (2019). Imanentni oznaky innovatsii u marketynhu yak osnova yikh konkurentospromozhnosti [Immanent features of innovations in marketing as the basis of their competitiveness]. *Visnyk Khmelnytskoho natsionalnoho universytetu. Ekonomichni nauky = Bulletin of Khmelnytskyi National University. Economic sciences*, No. 5, P. 126–135 [in Ukrainian].

Kazarian, A. A. (2013). Rol marketynhu innovatsii yak instrumentu pidvyshchenni konkurentospromozhnosti pidpriemstva [The role of innovation marketing as a tool for increasing the competitiveness of entrepreneurship]. *Visnyk Natsionalnoho tekhnichnoho universytetu "KhPI". Ser.: Tekhnichniy prohres ta efektyvnist vyrobnytstva = Bulletin of the KhPI National Technical University. Ser.: Technical progress and production efficiency*, No. 67(2), P. 88–92 [in Ukrainian].

Kramar, M. S., Puzyrova, P. V. (2019). Zastosuvannia marketynhovoho instrumentarii vprovadzhennia innovatsii u pidpriemnytsku diialnist [Application of marketing tools for introducing innovations in business activity]. *Ekonomika, oblik, finansy ta pravo: analiz tendentsii ta perspektyv rozvytku = Economics, accounting, finance and law: analysis of trends and prospects for development: a collection of theses of reports of the International Scientific and Practical Conference*, Part 3, P. 58–59 [in Ukrainian].

Krasnorutskyi, O. O., Zaitsev, Yu. O., Hatsko, A. F. (2018). Konkurentni zasady innovatsiinoi marketynhovo diialnosti sub'ektiv ahrobiznesu [Competitive principles of innovative marketing activity of agribusiness subjects]. *Ukrainskyi zhurnal prykladnoi ekonomiky = Ukrainian Journal of Applied Economics*, Vol. 3, No. 2, P. 39–46 [in Ukrainian].

Kuznietsova, T. V., Sipailo, L. H. (2017). Mekhanizm vplyvu marketynhu innovatsii na konkurentni perevahy pidpriemstva [The mechanism of influence of marketing innovations on the competitive advantages of the enterprise]. *Biznes Inform = Business Inform*, No. 5, P. 293–299 [in Ukrainian].

Luferenko, L. Yu. (2016). Innovatsiinyi marketynh yak instrument pidvyshchennia konkurentospromozhnosti pidpriemstv [Innovative marketing as a tool for increasing the competitiveness of enterprises]. *Visnyk Dnipropetrovskoho universytetu. Serii: Ekonomika = Bulletin of Dnipropetrovsk University. Series: Economy*, Vol. 24, Issue 10 (2), P. 78–84 [in Ukrainian].

Martyn, O. M., Lemeshchenko, N. M., Artemchuk, V. O., Parokhnenko, O. S. (2022). Modeliuvannia systemy upravlinnia konkurentospromozhnistiu pidpriemstva na osnovi marketynhu v umovakh zminy spozhyvchych perevah ta rozvytku innovatsiinoho pidpriemnytstva [Modeling of the enterprise competitiveness management system based on marketing in the conditions of changes in consumer preferences and the development of innovative entrepreneurship]. *Formuvannia rynkovykh vidnosyn v Ukraini = Formation of market relations in Ukraine*, No. 1, P. 33–39 [in Ukrainian].

Morokhova, V. O., Boiko, O. V., Lorvi, I. F. (2021). Marketynh innovatsii yak kompleksnyi instrument dosiahnennia stratehichnykh tsilei pidpriemstva v umovakh konkurentnoho seredovyscha [Marketing of innovations as a complex tool for achieving strategic goals of the enterprise in the conditions of a competitive environment]. *Ekonomichni nauky. Serii: Rehionalna ekonomika = Economic Sciences. Series: Regional economy*, Issue 18, P. 123–130 [in Ukrainian].

Nosenko, Yu. M., Nechyporenko, O. M., Sinelnik, L. M. (2021). Metodyka pochatkovoho marketynhovoho analizu saitiv konkurentiv u protsesi prosuvannia naukovoinnovatsiinoi produktsii [Methodology of the initial marketing analysis of competitors' sites in the process of promoting scientific and innovative products]. *Ekonomika APK = Economy of Agriculture*, No. 11, P. 62–69 [in Ukrainian].

Prokopenko, N. S., Kovalenko, O. V. (2018). Konkurentospromozhnist pidpriemstv i marketynh innovatsii: otsinka ta perspektyvy [Competitiveness of enterprises and innovation marketing: assessment and prospects]. *Ekonomika i upravlinnia = Economics and management*, No. 1, P. 42–51 [in Ukrainian].

Puzyrova, P. (2020). Using benchmarking to facilitate effective business development management [Benchmarking yak element upravlinnia efektyvnykh rozvytkom biznesu]. *Visnyk Kyivskoho natsionalnoho universytetu tekhnolohii ta dyzainu. Seriya Ekonomichni nauky = Bulletin of Kyiv National University of Technologies and Design. Economic sciences series*, No. 1 (143), P. 69–78.

Puzyrova, P. V. (2011). Znachennia marketynhovoho doslidzhennia pry vyznachenni kliuchovykh faktoriv vplyvu na plan vyrobnytstva produktsii promyslovykh pidpryemstv [The value of marketing research in determining key factors influencing the production plan of industrial enterprises]. *Problemy pidvyshchennia efektyvnosti infrastruktury = Problems of increasing the efficiency of infrastructure: a collection of scientific papers*, Issue 30, P. 168–174 [in Ukrainian].

Razvodovska, V. O. Zaiats, O. V., Parokhnenko, O. S., Hnatenko, I. A. (2021). Innovatsiiniy v pidpryiemnytskii diialnosti v systemi efektyvnoho upravlinnia operatsiinoiu diialnistiu, konkurentospromozhnistiu ta marketynhom [Innovation in entrepreneurial activity in the system of effective management of operational activity, competitiveness and marketing]. *Ukrainskyi zhurnal prykladnoi ekonomiky = Ukrainian journal of applied economy*, Vol. 6, No. 1, P. 290–297 [in Ukrainian].

Shumkova, O. V. Shumkova, V. I., Kolodnenko, N. V. (2023). Vzaimozv'язok innovatsiinoho ta sotsialno-etychnoho marketynhiv yak dzhherela formuvannia konkurentnykh perevah [Interrelationship between innovative and socio-ethical marketing as a source of formation of competitive advantages]. *Pryazovskyi ekonomichniy visnyk = Pryazovsky Economic Bulletin*, Issue 1, P. 42–47 [in Ukrainian].

Taranenko, I. V. (2012). Marketynhovi innovatsii v zabezpechenni konkurentospromozhnosti: systemnyi pidkhid [Marketing innovations in ensuring competitiveness: a systematic approach]. *Visnyk sotsialno-ekonomichnykh doslidzhen = Herald of social and economic research*, Issue 2, P. 180–185 [in Ukrainian].

Taranenko, I. V. (2015). Innovatsiinyi marketynh yak instrument zabezpechennia konkurentospromozhnosti v umovakh hlobalizatsii [Innovative marketing as a tool for ensuring competitiveness in the conditions of globalization]. *Ekonomichniy prostir = Economic space*, No. 94, P. 49–59 [in Ukrainian].

Tarnavska, N., Holodniuk, O. (2015). Marketynhovi innovatsii yak priorytetne dzherelo konkurentnykh perevah pidpryemstv [Marketing innovations as a priority source of competitive advantages of enterprises]. *Visnyk Ternopilskoho natsionalnoho ekonomichnoho universytetu = Bulletin of the Ternopil National Economic University*, Issue 3, P. 79–92 [in Ukrainian].

Telyshevska, L. I., Maiboroda, T. A., Pidvalna, K. S. (2011). Marketynh innovatsii yak odyin z instrumentiv zabezpechennia konkurentospromozhnosti pidpryemstva [Marketing of innovations as one of the tools for ensuring the competitiveness of the enterprise]. *Ekonomika promyslovosti = Economy of industry*, No. 4, P. 195–198 [in Ukrainian].

Yevseitseva, O. S. (2016). Suchasni metodyky prohnozuvannia koniunktury rynku ta yikh vykorystannia pry provedenni marketynhovykh doslidzhen [Modern methods of forecasting the market situation and their use in conducting marketing research]. *Nauk.-praktych. zhurn. "Ekonomika i derzhava" = Scientific and practical journal "Economy and the State"*, No. 5, P. 97–100 [in Ukrainian].

Yevseitseva, O. S. (2017). Osoblyvosti rozrobky marketynhovoï stratehii vyshchoho navchalnoho zakladu [Peculiarities of developing a marketing strategy of a higher educational institution]. *Nauk.-praktych. zhurn. "Ekonomika i derzhava" = Scientific and practical journal "Economy and the State"*, No. 3, P. 77–81 [in Ukrainian].

Yevseitseva, O. S., Olshanska, Ya. O. (2023). Mekhanizm rozrobky SMM-strategii dlia brendu produktsii pidpriemstva [Mechanism of SMM-strategy development for the company's product brand]. *Zhurnal stratehichnykh ekonomichnykh doslidzhen = Journal of strategic economic research*, No. 3(14), P. 84–93 [in Ukrainian].

Yevseitseva, O. S., Subot, T. P. (2023). Rozrobka marketynhovoï strategii yak chynnyka konkurentospromozhnosti na rynku turystychnykh posluh [Development of a marketing strategy as a factor of competitiveness in the market of tourist services]. *Innovatyka v osviti, nauksi ta biznesi: vyklyky ta mozhlyvosti = Innovation in education, science and business: challenges and opportunities: Materials of the 4th All-Ukrainian conference of higher education graduates and young scientists*, T. 1. P. 288 [in Ukrainian].

Yevseitseva, O., Liulchak, Z., Semenda, O., Järvis, M., Ponomarenko, I. (2022). Digital-marketing as a modern tool for promotion of goods and services in social networks. *Finansovo-kredytna diialnist: problemy teorii i praktyky = Financial and credit activity: problems of theory and practice*, No. 1 (42), P. 361–370.

AUTHOR (S) BIOSKETCHES



Ievseitseva Olena, PhD in Economics, Associate Professor, Head of the Department of Marketing and Communication Design, Kyiv National University of Technologies and Design, Ukraine.

<https://orcid.org/0000-0001-6079-2968>

Scopus Author ID: 57866119600

Researcher ID: W-9680-2018

E-mail: yevseitseva.os@kntud.com.ua



Mihalatii Oleksandr, Graduate student, Department of Marketing and Communication Design, Kyiv National University of Technologies and Design, Ukraine.

<https://orcid.org/0009-0004-5875-2149>

E-mail: mihalatii.ov@kntud.edu.ua

COPYRIGHTS

©2023 The author(s). This is an open access article distributed under the terms of the Creative Commons Attribution (CC BY 4.0), which permits unrestricted use, distribution, and reproduction in any medium, as long as the original authors and source are cited. No permission is required from the authors or the publishers.

HOW TO CITE THIS ARTICLE

Ievseitseva, O., Mihalatii, O. (2023). The importance of marketing innovations as the basis of management of the enterprise's competitiveness. *Management*, 2(38): 85–95. <https://doi.org/10.30857/2415-3206.2023.2.7>.

JEL Classification:
L86

UDC 330.341

DOI: 10.30857/2415-
3206.2023.2.8

THE INNOVATIVE MARKETING MANAGEMENT SYSTEMS IN DIGITALIZATION CONDITIONS

Olena CHERNIAVSKA¹, Vitalii KAZNODII¹

¹ *Kyiv National University of Technologies and
Design, Ukraine*

THE PURPOSE OF THE ARTICLE is to theoretically deepen the essence of marketing management and determine the main components of the innovative marketing system through the prism of digital technologies.

RESEARCH METHODS. During the research, various general and scientific methods were used to obtain a detailed understanding and analysis of this problem: the method of literary analysis; empirical methods; analytical methods; expert methods; tabular and graphic method.

PRESENTING MAIN MATERIAL. The marketing management system in the era of digitalization includes the use of digital technologies and online tools for planning, implementing and measuring marketing strategies and campaigns. The marketing management system takes into account changes in consumer behavior, the speed of technological change, and the availability of large amounts of data. Digital transformation requires enterprises to constantly adapt to new technologies and changes in consumer trends for effective marketing management. It has been established that digitization plays an important role in all marketing in any field of the enterprise, which helps to collect huge amounts of data, analyze them with the help of artificial intelligence and accurately determine the vector of campaign development. The integration of CRM systems, the automation of marketing processes and the use of analytics make it possible to more accurately define the target audience and personalize offers. A comprehensive study of innovative digital marketing tools becomes an important stage for understanding their impact and optimal use, which allows companies to effectively adapt to changes in the digital environment, increases their competitiveness and helps build strong relationships with customers. Innovative development of the

marketing service should be aimed at ensuring a high level of customer satisfaction and adaptation to the rapidly changing market environment. Technological innovations affect the competitiveness of business organizations, providing them with the opportunity to adapt to changes in market conditions and meet the needs of modern consumers. Companies that successfully incorporate digital technologies into their marketing strategy are often able to compete more effectively and ensure sustainable growth.

CONCLUSIONS. In the research process, it was proven that the conditions of digitalization define a new context for marketing, requiring enterprises to adapt to a rapidly changing environment. Innovative marketing management systems play a key role in ensuring the efficiency and competitiveness of companies in a digitalized world. So, among the innovative systems of marketing management of digitalization conditions, we included: analytics and artificial intelligence; content marketing and interactive content; social media and influencer marketing; mobile marketing and marketing using messengers; e-commerce and personalized recommendation system; marketing automation; blockchain technology for trust and transparency. Innovative marketing management systems in conditions of digitalization allow companies to interact more effectively with the audience, adapt to changes in market conditions and increase competitiveness. Together, these systems can create a powerful marketing stack to function successfully in a digitalized economy.

KEYWORDS: innovative systems; marketing management; digitalization; digital technologies; marketing strategies; digital transformation; artificial intelligence; company development vector; CRM systems; automation of marketing processes; target audience.

NUMBER OF REFERENCES	NUMBER OF FIGURES	NUMBER OF TABLES
25	1	2

JEL Classification:
L86

УДК 330.341

DOI: 10.30857/2415-
3206.2023.2.8

ІННОВАЦІЙНІ СИСТЕМИ МАРКЕТИНГОВОГО УПРАВЛІННЯ В УМОВАХ ЦИФРОВІЗАЦІЇ

Олена ЧЕРНЯВСЬКА¹, Віталій КАЗНОДІЙ¹

¹ Київський національний університет технологій
та дизайну, Україна

МЕТОЮ СТАТТІ є теоретичне поглиблення сутності маркетингового управління та визначення основних складових інноваційної системи маркетингу крізь призму цифрових технологій.

МЕТОДИ ДОСЛІДЖЕННЯ. При дослідженні було використано різні загальні та наукові методи для отримання докладного розуміння та аналізу даної проблеми: метод літературного аналізу; емпіричні методи; аналітичні методи; експертні методи; таблично-графічний метод.

ВИКЛАД ОСНОВНОГО МАТЕРІАЛУ. Система маркетингового управління в епоху цифровізації включає в себе використання цифрових технологій і онлайн-інструментів для планування, впровадження та вимірювання маркетингових стратегій і кампаній. Система маркетингового управління враховує зміни в споживацькому поведінці, швидкості зміни технологій та доступності великої кількості даних. Цифрова трансформація вимагає від підприємств постійного адаптування до нових технологій і змін в споживчих тенденціях для ефективного маркетингового управління. Встановлено, що цифровізація відіграє важливе значення для всього маркетингу у будь-якій сфері діяльності підприємства, що допомагає збирати величезні обсяги даних, аналізувати їх за допомогою штучного інтелекту та точно визначати вектор розвитку кампанії. Інтеграція CRM-систем, автоматизація маркетингових процесів і використання аналітики дозволяють більш точно визначити цільову аудиторію та персоналізувати пропозиції. Комплексне дослідження інноваційних інструментів цифрового маркетингу стає важливим етапом для розуміння їхнього впливу і оптимального використання, що дозволяє компаніям ефективно адаптуватися до змін у цифровому середовищі, підвищує їхню конкурентоспроможність та сприяє побудові міцних взаємин із клієнтами. Інноваційний розвиток служби маркетингу повинен бути

спрямований на забезпечення високого рівня задоволення клієнтів та адаптацію до швидко змінюючогося ринкового середовища. Технологічні інновації впливають на конкурентоспроможність бізнес-організацій, забезпечуючи їм можливість адаптуватися до змін в умовах ринку та задовольняти потреби сучасних споживачів. Компанії, які успішно впроваджують цифрові технології у свою стратегію маркетингу, часто здатні ефективніше конкурувати та забезпечувати стабільний розвиток.

ВИСНОВКИ. В процесі дослідження було доведено, що умови цифровізації визначають новий контекст для маркетингу, вимагаючи від підприємств адаптації до швидко змінюючогося середовища. Інноваційні системи маркетингового управління грають ключову роль у забезпеченні ефективності та конкурентоспроможності компаній в цифровізованому світі. Так, до інноваційних систем маркетингового управління в умовах цифровізації нами було віднесено: аналітику та штучний інтелект; контент-маркетинг та інтерактивний контент; соціальні медіа та впливовий маркетинг; мобільний маркетинг та маркетинг з використанням месенджерів; електронна комерція та персоналізована рекомендаційна система; маркетинг автоматизації; блокчейн технології для довіри та прозорості. Інноваційні системи маркетингового управління в умовах цифровізації дозволяють компаніям ефективніше взаємодіяти з аудиторією, пристосовуватися до змін в ринкових умовах та підвищувати конкурентоспроможність. Ці системи разом можуть створити потужний маркетинговий стек для успішного функціонування в цифровізованій економіці.

КЛЮЧОВІ СЛОВА: інноваційні системи; маркетингове управління; цифровізація; цифрові технології; маркетингові стратегії; цифрова трансформація; штучний інтелект; вектор розвитку компаній; CRM-системи; автоматизація маркетингових процесів; цільова аудиторія.

Statement of the problem. In the era of digitalization, marketing management systems are becoming real technological creations. The automation of processes, the use of analytics and artificial intelligence provide unlimited opportunities. The collection and analysis of large volumes of data allow better understanding of the audience and personalization of approaches. Internet marketing, social networks, e-commerce all affect marketing strategies and tactics (Bychkova & Puzyrova, 2022; Doroshkevych & Mokin, 2015; Illiashenko & Rud, 2020). The marketing management system in the era of digitalization includes the use of digital technologies and online tools for planning, implementing and measuring marketing strategies and campaigns. The marketing management system takes into account changes in consumer behavior, the speed of technological change, and the availability of large amounts of data. Digital transformation requires enterprises to constantly adapt to new technologies and changes in consumer trends for effective marketing management (Kovalchuk, 2021; Kramar & Puzyrova, 2019; Krasovska, 2021; Lyshenko et al., 2023).

Analysis of publications on the problem. The conditions of digitization significantly change approaches to marketing management, requiring companies to implement innovative systems. An in-depth scientific view in this direction is manifested in the works of such scientists: N. Abliazova, O. Bilovodska, O. Boiko, V. Hnoievyi, V. Holomb, D. Doroshkevych, O. Yevseitseva, T. Zabashtanska, D. Zavadska, A. Zerkal, M. Ivanov, L. Ihnatovych, N. Illiashenko, S. Illiashenko, S. Kovalchuk, O. Koren, O. Krasovska, A. Kulyk, A. Lapan, I. Lytvynenko, M. Lyshenko, I. Lorvi, N. Makarenko, Ye. Mokin, V. Morokhova, M. Mudra, S. Nazarenko, M. Nikitenko, V. Polyvoda, O. Popelo, N. Proskurnina, P. Puzyrova, I. Reshetnikova, L. Romanova, M. Rud, S. Savchenko, O. Sukach, N. Trusova, T. Ustik, Ts. Tszin, K. Shebeda, Yu. Shypulina, A. Yakivchenko, I. Yakushyk and others. But the issue of integrating modern innovative technologies of marketing systems to create effective and innovative marketing strategies in the digital environment remains insufficiently researched.

Statement of the main results. Digitization plays an important role in all marketing in any field of the company's activity, which helps to collect huge amounts of data, analyze them with the help of artificial intelligence and accurately determine the vector of campaign development. The integration of CRM systems, the automation of marketing processes and the use of analytics make it possible to more accurately define the target audience and personalize offers. Social media has become a powerful tool for customer engagement, and video and interactive content are becoming increasingly popular (Morokhova et al., 2021; Mudra & Tszin, 2023; Puzyrova, 2020). It's also important to consider mobile traffic, as most users interact with content via mobile devices.

Automated platforms for mailings, advertising campaigns and interaction with customers help to optimize time and resources. Such systems also allow you to monitor the effectiveness of campaigns and make adjustments in real time. It is also important to ensure data security and privacy, especially given the growing number of cyber threats in the digital environment. The main aspects of the marketing management system in the era of digitalization include (Table 1).

Table 1

**The relevance of the marketing management system
in the era of digitalization**

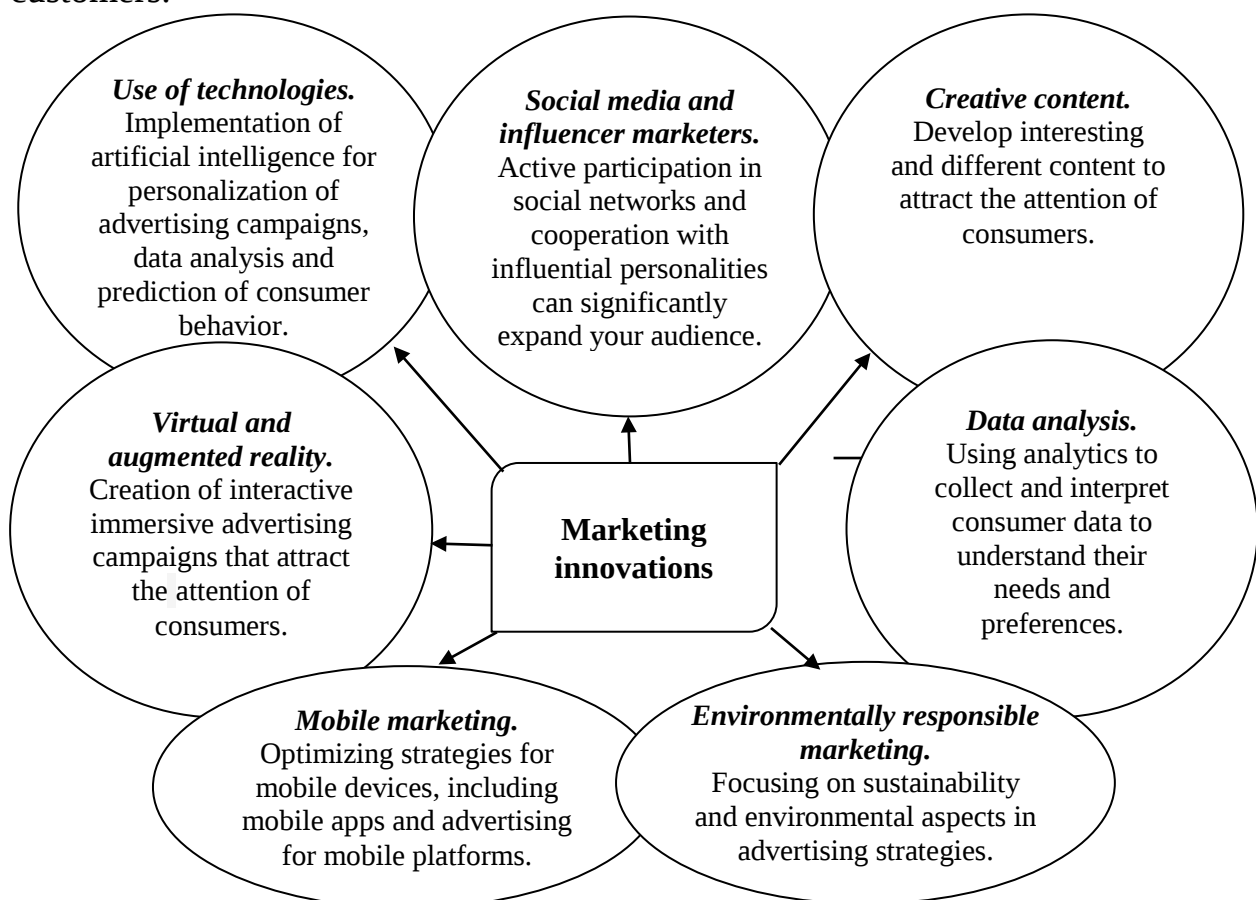
Direction	Result
Analytics and Measurement	Using analytics tools to collect and analyze data about consumers, competitors, and the results of marketing campaigns. This allows you to make informed decisions and optimize strategies.
Digital Content	The focus is on creating and distributing digital content such as videos, blogs, social media, e-books, etc. to gain attention and engage an audience.
Social networks	Using popular social networks to communicate with customers, build communities and engage with audiences.
E-commerce	The development of online sales and services through the Internet, which allows companies to take positions in the global market.
Marketing automation	Using marketing automation platforms to plan and execute campaigns, manage communication channels, and automate routine tasks.
Personalization and Engagement	Using personalized approaches to communicating with customers, taking into account their individual needs and preferences.
Mobile marketing	Focus on interacting with the audience through mobile devices and applications.
Innovation and new technologies	Using the latest technologies, such as artificial intelligence, virtual and augmented reality, to improve marketing strategies.
Cyber Security and Data Protection	Keeping dedicated customer data and proprietary marketing data safe in an era of growing digital crime.

Source: built by the authors on the basis of (Tkachenko et al., 2019; Trusova & Yakushyk, 2019; Ustik & Nazarenko, 2022).

Digitalization processes accelerate the development of all companies. It is important to adapt to new realities to ensure competitiveness and long-term efficiency. Marketing specialists are actively implementing innovative ideas and technologies using Internet platforms. With this in mind, it is important to further explore digital marketing tools and their potential to improve customer communication in the online environment. Digitization, which includes the use of digital technologies to optimize business processes and ensure competitive advantages, is a real necessity for modern companies. Optimizing the functioning of companies through digital marketing tools plays a key role in achieving goals and ensuring sustainability in the long term (Puzyrova et al., 2022; Romanova, 2021; Savchenko et al., 2021).

One of the main directions in this context is the use of innovative technologies and approaches. Marketing specialists actively implement progressive ideas that are based on innovative solutions and use advanced technologies. This may include using artificial intelligence to analyze customer data, automating marketing campaigns, implementing virtual reality to improve customer interactions, and more. Online profile platforms also play an important role in digital marketing. They allow companies to interact with the audience, advertise, study consumer demand and trends. Social networks, online stores, as well as other online platforms provide the opportunity to create and manage digital marketing campaigns, adapting them to the requirements of the digital environment (Yevseitseva & Olshanska, 2023; Puzyrova, 2011; Yevseitseva & Subot, 2023).

A comprehensive study of innovative digital marketing tools becomes an important stage for understanding their impact and optimal use (Fig. 1). This allows companies to effectively adapt to changes in the digital environment, increases their competitiveness and helps build strong relationships with customers.



Source: built by the authors on the basis of (Yakivchenko, 2021; Yankovets, 2022; Yevseitseva, 2016).

Fig. 1. Composition of innovative tools of the digital marketing system

Innovative development of the marketing service at the enterprise is important for ensuring competitiveness, attracting new customers and maintaining the existing audience. Innovative development of marketing is not possible without the implementation of the following components (Table 2).

Table 2

**Components of innovative development
of the marketing system in the company**

Components	Field of application
Use of artificial intelligence (AI) and analytics technologies	Implementation of automated data processing systems to analyze customer buying habits.
	Using AI for personalized marketing, creating individual recommendations and promotions.
E-commerce and mobile marketing	Development of mobile applications for convenient ordering of goods and obtaining information.
	Use of payment systems and technologies to ensure security and ease of payment.
Use of virtual and augmented reality	Creation of interactive advertising campaigns using AR/VR.
	Implementation of virtual premises for virtual inspection of products or services.
Social networks and influencer marketing	Development of a marketing strategy in social networks with an emphasis on interaction with the audience.
	Collaboration with influencers to promote products or services.
Content Marketing Strategy	Creating interesting and useful content to attract attention.
	Using a variety of content formats: video, audio, infographics, blogs, etc.
Marketing research and testing	Application of the latest market research methods to gather information about customers and competitors.
	Conducting A/B testing to optimize advertising campaigns and strategies.
Participation in events and sponsorships	Organizing or participating in events and activities that support the company's image.
	Sponsorship of events or teams to expand the brand and attract attention.
Green marketing	Implementation of sustainable development and responsible consumption strategies.
	Communication of company values related to environmental protection.
Attracting consumers	through gamification Introduction of game elements into loyalty programs and advertising campaigns.
	Organization of raffles and contests to attract the attention of customers.
Educational Initiatives	Providing educational resources to customers about products or services.
	Organization of webinars and workshops to increase customer awareness.

Source: built by the authors on the basis of (Yevseitseva, 2017; Yevseitseva et al., 2022; Zabashtanska et al., 2021).

Innovative development of the marketing service should be aimed at ensuring a high level of customer satisfaction and adaptation to the rapidly

changing market environment. Technological innovations affect the competitiveness of business organizations, providing them with the opportunity to adapt to changes in market conditions and meet the needs of modern consumers. Companies that successfully incorporate digital technologies into their marketing strategy are often able to compete more effectively and ensure sustainable growth (Yevseitseva & Olshanska, 2023; Puzyrova, 2011; Yevseitseva & Subot, 2023).

In the conditions of digitalization of the economy, marketing management systems play an important role in achieving success for enterprises. Digital technologies are changing the way businesses interact with customers, as well as requiring new marketing strategies and tools. Key aspects of marketing management systems in the digital economy include:

- data analysis (digital technologies provide a large amount of data about customers, their behavior and participation on the Internet; modern marketing systems must effectively analyze this data to obtain valuable information that allows enterprises to better understand their customers and adapt their strategies);
- automation of marketing processes (the use of automation tools makes it possible to optimize the operation of marketing campaigns, interaction with customers and management of various aspects of the marketing strategy);
- omnichannel (it is important to have a system that can effectively manage marketing efforts on various communication channels – from traditional channels to digital platforms, social networks and mobile applications);
- personalization (digital technologies allow creating personalized marketing strategies, taking into account the individual needs and previous actions of customers);
- use of AI/MN (systems based on artificial intelligence can provide more accurate forecasting and automation of decisions in marketing management);
- development of interaction with customers (it is important to use digital channels for active interaction with customers, taking into account their reviews and feedback);
- effective provision of cyber security (protection of personal data of customers and other confidential information resources becomes an extremely important aspect in the conditions of the digital economy);
- content marketing strategy (with so much information available online, it is important to have effective content marketing strategies to attract and retain customers).

These aspects reflect only some directions that may be important in marketing management systems in the digital economy. Given the rapid changes in the technology landscape, it is important to constantly update and adapt marketing strategies to achieve optimal results.

Conclusions. The conditions of digitalization define a new context for marketing, requiring enterprises to adapt to a rapidly changing environment. Innovative marketing management systems play a key role in ensuring the efficiency and competitiveness of companies in a digitalized world. Thus, we include: analytics and artificial intelligence as innovative marketing management systems for digitalization conditions; content marketing and interactive content; social media and influencer marketing; mobile marketing and marketing using messengers; e-commerce and personalized recommendation system; marketing automation; blockchain technology for trust and transparency.

Innovative marketing management systems in conditions of digitalization allow companies to interact more effectively with the audience, adapt to changes in market conditions and increase competitiveness. Together, these systems can create a powerful marketing stack to function successfully in a digitalized economy.

REFERENCES:

Bychkova, V., Puzyrova, P. (2022). Theoretical basics of the strategy of the entry of foreign enterprises to the markets of Ukraine. *Innovatyka v osviti, nauksi ta biznesi: vyklyky ta mozhlyvosti = Innovation in education, science and business: challenges and opportunities: materials of the III All-Ukrainian Conference of Higher Education Graduates and young scientists*, Vol. 2, P. 10–16.

Doroshkevych, D. V., Mokin, Ye. M. (2015). Systematyzatsiia komponentiv marketynhovoho doslidzhennia z vrakhuvanniam innovatsiinoi skladovoi [Systematization of components of marketing research taking into account the innovative component]. *Upravlinnia proektamy, systemnyi analiz i lohistyka = Project management, system analysis and logistics*, Issue 15(2), P. 77–84 [in Ukrainian].

Illiasenko, S. M., Rud, M. P. (2020). Pidkhody do stvorennia marketynhovykh innovatsii u systemi kompleksu marketynhu 4R [Approaches to the creation of marketing innovations in the 4R marketing complex system]. *Visnyk Odeskoho natsionalnoho universytetu. Serii: Ekonomika = Bulletin of Odessa National University. Series: Economy*, Vol. 25, Issue 1, P. 120–128 [in Ukrainian].

Kovalchuk, S. V. (2021). Stratehichni napriamy rozvytku marketynhovykh tekhnolohii v umovakh hlobalnoi tsyfrovizatsii ekonomiky [Strategic directions of development of marketing technologies in the conditions of global digitalization of the economy]. *Visnyk Khmelnytskoho natsionalnoho universytetu. Ekonomichni nauky = Bulletin of the Khmelnytskyi National University. Economic sciences*, No. 6(2), P. 7–15 [in Ukrainian].

Kramar, M. S., Puzyrova, P. V. (2019). Zastosuvannia marketynhovoho instrumentariiu vprovadzhennia innovatsii u pidpriemnytsku diialnist [Application of marketing tools for introducing innovations in business activity]. *Ekonomika, oblik, finansy ta pravo: analiz tendentsii ta perspektyv rozvytku = Economics, accounting, finance and law: analysis of trends and prospects for development: a collection of theses of reports of the International Scientific and Practical Conference*, Part 3, P. 58–59 [in Ukrainian].

Krasovska, O. Yu. (2021). Strukturno-funktsionalna skhema modeliuвання marketynhovoї diialnosti u sferi tsyfrovizatsii [Structural and functional scheme of modeling marketing activity in the sphere of digitalization]

marketing activity in the field of digitalization]. *Ahrosvit = Agrosvit*, No. 18, P. 50–55 [in Ukrainian].

Lyshenko, M. O., Makarenko, N. O., Kulyk, A. A., Polyvoda, V. V. (2023). Upravlinnia ekonomichnoiu bezpekoiu innovatsiino oriientovanoho pidpriemstva v umovakh staloho rozvytku, didzhitalizatsii, hlobalizatsii ta aktyvizatsii systemy adaptivnogo marketynhu [Management of economic security of an innovatively oriented enterprise in conditions of sustainable development, digitalization, globalization and activation of the adaptive marketing system]. *Formuvannia rynkovykh vidnosyn v Ukraini = Formation of market relations in Ukraine*, No. 1, P. 105–112 [in Ukrainian].

Morokhova, V. O., Boiko, O. V., Lorvi, I. F. (2021). Marketynh innovatsii yak kompleksnyi instrument dosiahnennia stratehichnykh tsilei pidpriemstva v umovakh konkurentnoho seredovyshcha [Marketing of innovations as a complex tool for achieving strategic goals of the enterprise in the conditions of a competitive environment]. *Ekonomichni nauky. Serii: Rehionalna ekonomika = Economic Sciences. Series: Regional economy*, Issue 18, P. 123–130 [in Ukrainian].

Mudra, M. S., Tszin, Ts. (2023). Suchasni tekhnolohii formuvannia stratehii marketynhovoho menedzhmentu pidpriemstv yak imperatyv yikh innovatsiinoho rozvytku [Modern technologies for the formation of marketing management strategies of enterprises as an imperative for their innovative development]. *Prostorovy rozvytok = Spatial development*, Issue 4, P. 176–185 [in Ukrainian].

Puzyrova, P. (2020). Using benchmarking to facilitate effective business development management. *Visnyk Kyivskoho natsionalnoho universytetu tekhnolohii ta dyzainu. Serii Ekonomichni nauky = Bulletin of Kyiv National University of Technologies and Design. Economic sciences series*, No. 1 (143), P. 69–78.

Puzyrova, P. V. (2011). Znachennia marketynhovoho doslidzhennia pry vyznachenni kliuchovykh faktoriv vplyvu na plan vyrobnytstva produktsii promyslovykh pidpriemstv [The value of marketing research in determining key factors influencing the production plan of industrial enterprises]. *Problemy pidvyshchennia efektyvnosti infrastruktury = Problems of increasing the efficiency of infrastructure: a collection of scientific papers*, Issue 30, P. 168–174 [in Ukrainian].

Puzyrova, P. V., Khmelevskiy, N. O., Mammadova, S. (2022). Main aspects of international marketing activities of export companies. *Formuvannia rynkovykh vidnosyn v Ukraini = Formation of market relations in Ukraine*, No. 7–8 (254–255), P. 124–131.

Romanova, L. V. (2021). Marketynhove upravlinnia yak stratehichna innovatsiina skladova suchasnoho rozvytku pidpriemnytstva na promyslovykh pidpriemstvakh [Marketing management as a strategic innovative component of the modern development of entrepreneurship at industrial enterprises]. *Naukovi pratsi Mizhrehionalnoi akademii upravlinnia personalom. Ekonomichni nauky = Scientific works of the Interregional Academy of Personnel Management. Economic sciences*, Issue 1, P. 50–56 [in Ukrainian].

Savchenko, S. O., Abliazova, N. R., Sukach, O. M. (2021). Innovatsiinyi marketynh u systemi upravlinnia pidpriemstvom [Innovative marketing in the enterprise management system]. *Pidpriemnytstvo ta innovatsii = Entrepreneurship and Innovation*, Issue 17, P. 46–49 [in Ukrainian].

Tkachenko, V., Kwilinski, A., Tkachenko, I., Puzyrova, P. (2019). Theoretical and methodical approaches to the definition of marketing risks management concept at industrial enterprises. *Marketing and Management of Innovations*, Issue 2, P. 228–238.

Trusova, N. V., Yakushyk, I. D. (2019). Funktsionalnist mekhanizmu marketynhovo diialnosti ta yoho instrumentarii v systemi innovatsiinoho rozvytku sub'iektiv ahrobiznesu

[Functionality of the mechanism of marketing activity and its tools in the system of innovative development of agribusiness subjects]. *Scientific papers of Dmytro Motornyi Tavria state agrotechnological university (economic sciences) = Scientific papers of Dmytro Motornyi Tavria state agrotechnological university (economic sciences)*, No. 1, P. 88–95 [in Ukrainian].

Ustik, T. V., Nazarenko, S. V. (2022). Modeliuvannia systemy marketynhovoho upravlinnia innovatsiino oriientovanykh pidpriemstv ahroprodovolchoi sfery v hlobalizatsiinykh umovakh ekonomiky znan [Modeling of the marketing management system of innovatively oriented agro-food enterprises in the globalization conditions of the knowledge economy] *Formuvannia rynkovykh vidnosyn v Ukraini = Formation of market relations in Ukraine*, No. 9, P. 90–97 [in Ukrainian].

Yakivchenko, A. M. (2021). Innovatsiinyi marketynh u systemi rozvytku promyslovykh pidpriemstv [Innovative marketing in the development system of industrial enterprises]. *Ekonomichnyi visnyk. Serii: Finansy, oblik, opodatkuvannia = Economic Bulletin. Series: Finances, accounting, taxation*, Issue 8, P. 156–163 [in Ukrainian].

Yankovets, T. (2022). Stratehichne upravlinnia tsyfrovym marketynhom [Strategic management of digital marketing]. *Scientia Fructuosa = Scientia Fructuosa*, No. 5, P. 93–112 [in Ukrainian].

Yevseitseva, O. S. (2016). Suchasni metodyky prohnozuvannia koniunktury rynku ta yikh vykorystannia pry provedenni marketynhovykh doslidzhen [Modern methods of forecasting the market situation and their use in conducting marketing research]. *Nauk.-praktych. zhurn. «Ekonomika i derzhava» = Scientific and practical journal "Economy and the State"*, No. 5, P. 97–100 [in Ukrainian].

Yevseitseva, O. S. (2017). Osoblyvosti rozrobky marketynhovoï stratehii vyshchoho navchalnoho zakladu [Peculiarities of developing a marketing strategy of a higher educational institution]. *Nauk.-praktych. zhurn. «Ekonomika i derzhava» = Scientific and practical journal "Economy and the State"*, No. 3, P. 77–81 [in Ukrainian].

Yevseitseva, O. S., Olshanska, Ya. O. (2023). Mekhanizm rozrobky SMM-stratehii dla brendu produktsii pidpriemstva [Mechanism of SMM-strategy development for the company's product brand]. *Zhurnal stratehichnykh ekonomichnykh doslidzhen = Journal of strategic economic research*, N 3(14), P. 84–93 [in Ukrainian].

Yevseitseva, O. S., Subot, T. P. (2023). Rozrobka marketynhovoï stratehii yak chynnyka konkurentospromozhnosti na rynku turystychnykh posluh [Development of a marketing strategy as a factor of competitiveness in the market of tourist services]. *Innovatyka v osviti, nautsi ta biznesi: vyklyky ta mozhlyvosti = Innovation in education, science and business: challenges and opportunities: Materials of the 4th All-Ukrainian conference of higher education graduates and young scientists*, T. 1. P. 288 [in Ukrainian].

Yevseitseva, O., Liulchak, Z., Semenda, O., Järvis, M., Ponomarenko, I. (2022). Digital-marketing as a modern tool for promotion of goods and services in social networks. *Finansovo-kredytna diialnist: problemy teorii i praktyky = Financial and credit activity: problems of theory and practice*, No. 1 (42), P. 361–370.

Zabashanska, T., Popelo, O., Nikitenko, M. (2021). Marketynhovi zasady rozvytku systemy planuvannia innovatsii na pidpriemstvakh v umovakh tsyfrovizatsii [Marketing principles of the development of the innovation planning system at enterprises in conditions of digitalization]. *Problemy i perspektyvy ekonomiky ta upravlinnia = Problems and prospects of economics and management*, No. 4, P. 153–162 [in Ukrainian].

AUTHOR (S) BIOSKETCHES



Cherniavska Olena, D.Sc in Economics, Professor of Department of Marketing and Communication Design, Kyiv National University of Technologies and Design, Ukraine.

<https://orcid.org/0000-0001-9819-578X>

Scopus Author ID: 57217259403

E-mail: cherniavska.ov@knutd.edu.ua



Kaznodii Vitalii, Graduate student, Department of Marketing and Communication Design, Kyiv National University of Technologies and Design, Ukraine.

<https://orcid.org/0009-0001-7143-2770>

E-mail: vitalijkaznodij@gmail.com

COPYRIGHTS

©2023 The author(s). This is an open access article distributed under the terms of the Creative Commons Attribution (CC BY 4.0), which permits unrestricted use, distribution, and reproduction in any medium, as long as the original authors and source are cited. No permission is required from the authors or the publishers.

HOW TO CITE THIS ARTICLE

Cherniavska, O., Kaznodii, V. (2023). Management systems in digitalization conditions. *Management*, 2(38): 96–106. <https://doi.org/10.30857/2415-3206.2023.2.8>.

JEL Classification:
B40, C13, C42, C52

UDC 339.137.2

DOI: 10.30857/2415-
3206.2023.2.9

METHODOLOGICAL APPROACHES TO ASSESSING THE COMPETITIVENESS OF HOSPITALITY ESTABLISHMENTS

Ganna KUVIKA¹

¹Lesya Ukrainka Volyn National University, Lutsk,
Ukraine

INTRODUCTION. In the fiercely competitive landscape of the hospitality industry, the success and sustainability of establishments are contingent upon their ability to distinguish themselves in the market. This distinction, often referred to as competitiveness, encompasses a multitude of factors ranging from customer satisfaction and service quality to innovation and financial performance. Assessing and understanding these factors is fundamental for businesses striving to thrive in an ever-evolving market. This article delves into the intricate web of hospitality competitiveness, aiming to provide a comprehensive methodology that amalgamates qualitative and quantitative measures. By addressing this multidimensional concept, this research endeavors to shed light on the nuanced aspects that underpin the competitive advantage of hospitality establishments.

PURPOSE OF THE ARTICLE. The primary purpose of this article is to propose a robust and versatile methodology for evaluating the competitiveness of hospitality establishments. Through an extensive review of existing literature and an integration of various qualitative and quantitative metrics, this research aims to offer a holistic approach to businesses, policymakers, and researchers. By outlining the key dimensions of competitiveness and delineating practical methods of assessment, the article seeks to empower stakeholders in the hospitality industry with actionable insights. Furthermore, this research intends to bridge the existing gap in knowledge, providing a structured framework for understanding the dynamics of competitiveness in the contemporary hospitality landscape.

RESULTS. The results of this study unveil a multifaceted understanding of hospitality competitiveness. Through an amalgamation of qualitative and quantitative data, several key insights have emerged. Firstly, establishments that prioritize customer satisfaction and consistently deliver high-quality services tend to outperform their competitors.

Secondly, a strong emphasis on innovation, encompassing both technological advancements and unique service offerings, significantly contributes to the competitive edge. Additionally, financial stability, efficient operations, and a commitment to sustainable practices emerged as pivotal factors in determining the long-term competitiveness of hospitality businesses. By integrating these diverse elements, the proposed methodology offers a comprehensive view, enabling establishments to identify their strengths and areas needing improvement.

CONCLUSIONS. In conclusion, this research underscores the vital importance of adopting a multidimensional approach when assessing the competitiveness of hospitality establishments. The findings emphasize that a singular focus on any one aspect, be it customer satisfaction or financial performance, is insufficient in capturing the complexities of the industry. A holistic strategy that integrates customer-centric practices, innovative solutions, financial stability, and sustainability efforts is imperative for long-term success. Moreover, the study reaffirms that the adaptability of establishments in response to changing consumer preferences and technological advancements is paramount. As businesses navigate the competitive terrain of the hospitality industry, they must recognize that competitiveness is not a static attribute but a dynamic quality that necessitates continuous evaluation and evolution. By embracing the multifaceted methodology proposed in this research, establishments can position themselves strategically, anticipate market trends, and enhance their offerings, ensuring not only their survival but also their prosperity in the ever-competitive hospitality sector.

KEYWORDS: competitiveness; hospitality establishments; methodology; evaluation criteria; industry analysis; customer satisfaction; service quality; innovation; sustainability.

NUMBER OF REFERENCES	NUMBER OF FIGURES	NUMBER OF TABLES
12	5	1

JEL Classification:
B40, C13, C42, C52

УДК 339.137.2

DOI: 10.30857/2415-
3206.2023.2.9

МЕТОДИЧНІ ПІДХОДИ ДО ОЦІНКИ КОНКУРЕНТОСПРОМОЖНОСТІ ЗАКЛАДІВ СФЕРИ ГОСТИННОСТІ

Ганна КУВІКА

*Волинський національний університет імені Лесі
Українки, Луцьк, Україна*

ВСТУП. У гострому конкурентному середовищі індустрії гостинності успіх і сталість закладів залежать від їх здатності виділитися на ринку. Ця відмінність, яку часто називають конкурентоспроможністю, охоплює безліч факторів, починаючи від задоволеності клієнтів і якості послуг до інновацій і фінансових показників. Оцінка та розуміння цих факторів є фундаментальним для компаній, які прагнуть процвітати на ринку, що постійно розвивається. Ця стаття заглиблюється в складну мережу конкурентоспроможності гостинності, маючи на меті надати комплексну методологію, яка поєднує якісні та кількісні показники. Розглядаючи цю багатовимірну концепцію, це дослідження висвітлює нюанси, які лежать в основі конкурентної переваги закладів гостинності.

МЕТА СТАТТІ. Основна мета цієї статті – запропонувати надійну та універсальну методологію оцінки конкурентоспроможності закладів гостинності. Завдяки обширному огляду існуючої літератури та інтеграції різноманітних якісних і кількісних показників це дослідження має на меті використання цілісного підходу до компаній, політиків і дослідників. Окреслюючи ключові аспекти конкурентоспроможності та практичні методи оцінки, стаття прагне надати зацікавленим сторонам індустрії гостинності практичні ідеї. Крім того, це дослідження має на меті подолати існуючу прогалину в знаннях, забезпечуючи структуровану основу для розуміння динаміки конкурентоспроможності в сучасному ландшафті гостинності.

РЕЗУЛЬТАТИ. Результати цього дослідження розкривають багатогранне розуміння конкурентоспроможності гостинності. Завдяки об'єднанню якісних і кількісних даних з'явилося кілька ключових ідей. По-перше, заклади, які надають пріоритет задоволенню клієнтів і постійно надають високоякісні послуги, як правило, перевершують своїх конкурентів. По-друге, сильний акцент на інноваціях, що

охоплюють як технологічні досягнення, так і унікальні пропозиції послуг, значно сприяє конкурентній перевазі. Крім того, фінансова стабільність, ефективна діяльність і прихильність екологічним практикам стали ключовими факторами, що визначають довгострокову конкурентоспроможність підприємств гостинності. Інтегруючи ці різноманітні елементи, запропонована методологія пропонує комплексне уявлення, що дозволяє установам визначити свої сильні сторони та сфери, які потребують вдосконалення.

ВИСНОВКИ. Дане дослідження підкреслює життєво важливе застосування багатовимірного підходу до оцінки конкурентоспроможності закладів гостинності. Можна відмітити, що єдиної уваги до будь-якого одного аспекту, будь то задоволеність клієнтів чи фінансові показники, недостатньо для охоплення складності галузі. Цілісна стратегія, яка об'єднує практики, орієнтовані на клієнта, інноваційні рішення, фінансову стабільність і зусилля щодо сталого розвитку, є обов'язковою умовою для довгострокового успіху. Крім того, дослідження ще раз підтверджує, що адаптивність закладів у відповідь на зміну споживчих уподобань і технологічний прогрес має першочергове значення. Оскільки підприємства орієнтуються в конкурентному середовищі індустрії гостинності, вони повинні визнати, що конкурентоспроможність – це не статична характеристика, а динамічна якість, яка потребує постійної оцінки та розвитку. Застосовуючи багатогранну методологію, запропоновану в цьому дослідженні, заклади можуть позиціонувати себе стратегічно, передбачати ринкові тенденції та покращувати свої пропозиції, забезпечуючи не лише своє виживання, але й процвітання в постійно конкурентному секторі гостинності.

КЛЮЧОВІ СЛОВА: конкурентоспроможність; заклади гостинності; методологія; критерії оцінки; галузевий аналіз; задоволеність клієнтів; якість обслуговування; інновації; стійкість.

Formulation of scientific problem and its significance. The scientific problem which forms the basis of this study is to carefully study the complex dynamics of competitiveness in the field of hospitality. In today's globalized economy, hospitality establishments face unpredictable challenges that arise from changing consumer preferences and ending with the impact of technological progress and sustainability issues. The primary challenge lies in the absence of a thorough and cohesive approach to evaluating the diverse aspects of competitiveness within this industry. Current studies frequently concentrate on isolated factors like customer satisfaction or financial performance, neglecting a comprehensive viewpoint. Consequently, scholars and industry experts face a deficiency in a well-organized framework that comprehensively embraces the myriad elements influencing the development of competitive advantages for hospitality establishments.

Solving this problem has important implications. Entities in the hospitality sector, including hotels, dining establishments, and travel services, play a noteworthy role in the worldwide economy. It is imperative for them to adeptly evaluate and enhance their competitiveness, as this is vital not only for their own prosperity but also for overall economic advancement. In the contemporary age, characterized by heightened consumer expectations, the comprehension and anticipation of these expectations are crucial for maintaining customer retention and fostering loyalty. Thus, solving the scientific problem of developing a comprehensive methodology for assessing competitiveness in the field of hospitality is of great importance both for academic research and for practical application.

Analysis of recent studies of the problem. A great contribution to the study of methodological aspects of competitiveness analysis was made by domestic scientists such as G.L. Azoev, N.K. Moiseyeva, R.A. Fathutdinov, V.E. Shershnyova, A.Yu. Yudanov and others. Among foreign researchers, it is worth noting the works of F. Kotler, M. Porter, A.J. Strickland, A.A. Thompson and others. The development of methods for assessing the competitiveness of tourist enterprises is reflected in the works of S.P. Gavrylyuk, V.G. Gerasimenko, N.M. Kuznetsova, S.G. Nezdoyminov and other authors.

Recently, scientists, specializing in hospitality management, deeply study the problem of assessing the competitiveness of hospitality establishments. In this direction, many studies have been conducted, each of which contributes its unique views and important conclusions regarding various aspects that determine competitiveness in this industry. One of the main themes running through these studies is the recognition of various factors that influence the success of host businesses, ranging from customer orientation to technological integration and sustainable practices (Kuznetsova and Nezdoyminov, 2010).

A significant part of the latest research focuses on the important role of customer satisfaction in shaping the competitiveness of guest establishments. Scientists considered the complex relationship between the impressions of guests and the overall level of satisfaction (Kutsenko, 2012). Research in this context not only emphasizes the importance of personalized service and guest engagement, but also highlights the impact of customer feedback on service improvement. In today's world, where online reviews and social media discussions can make or break a business, the ability to understand and respond to customer sentiment has become key to maintaining a competitive advantage (Borisova, 2012).

Another important area of research is service quality and its relationship with competitiveness. Researchers have studied the dimensions of service quality in detail, dividing it into a material component, reliability, speed of response, guarantees and empathy (Simenko and Kosova, 2013). General conclusion of these studies is clear: hospitality establishments that consistently provide high-quality service on all these criteria usually outperform their competitors. In addition, the concept of service innovation has become popular, and studies examine how innovative approaches and service significantly contribute to customer satisfaction and, consequently, competitiveness (Bohdan and Ferliy, 2016).

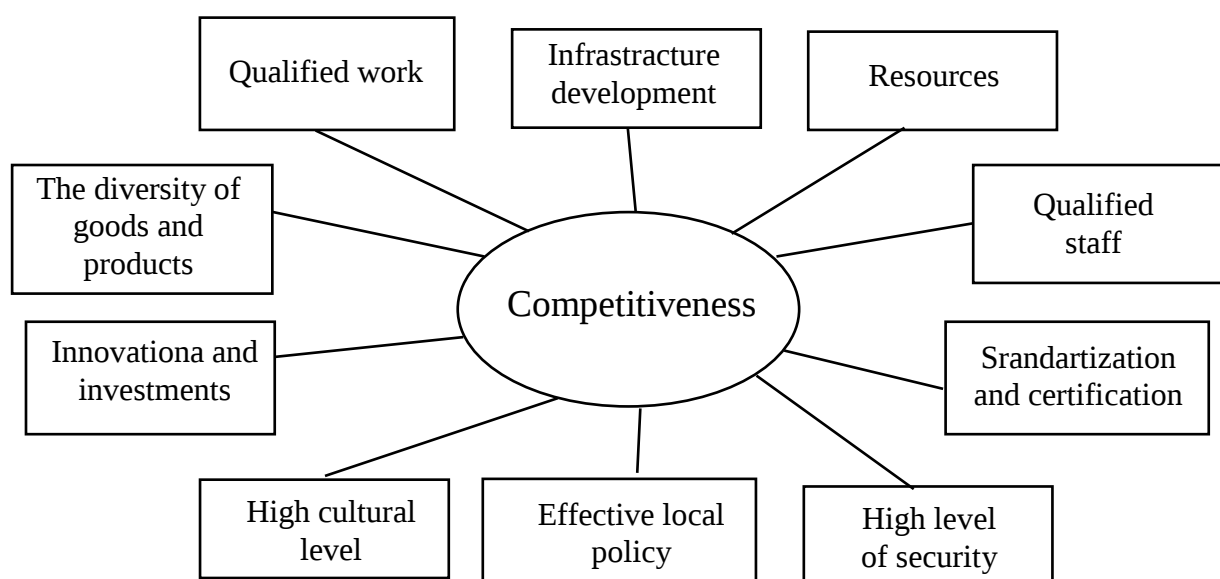
At the same time, research is aimed at understanding the impact of technology on the competitiveness of hospitality. The integration of digital tools, mobile applications and artificial intelligence in the hospitality industry is in the spotlight (Gerasimenko, 2010). Research shows how technologies such as chatbots improve guest interactions, simplify booking processes and provide personalized recommendations, thereby improving the overall guest experience.

Sustainable development as a determining factor of competitiveness also attracts considerable attention in modern literature. Hospitality establishments that implement green practices, energy-efficient measures and responsible sourcing not only contribute to the preservation of the environment, but also attract a growing segment of environmentally conscious consumers (Bohdan and Ferliy, 2016). Research shows that guests are increasingly choosing establishments that demonstrate a commitment to sustainable practices, creating a positive correlation between sustainability initiatives and competitive advantage.

Financial indicators remain a constant theme for research examining hospitality competitiveness. The researchers scrutinized various financial metrics, including revenue per room (RevPAR), average daily rate (ADR), and rate of return. Analyzing the financial condition of hospitality enterprises, researchers were able to identify patterns and trends that distinguish financially stable establishments from their counterparts. This financial perspective

provides a critical understanding of the economic sustainability of hospitality enterprises, thereby shaping their competitive positioning in the market (Gerasimchuk, 2003).

The **article aims** to present a thorough and cohesive approach for evaluating the diverse competitiveness of hospitality establishments. It seeks to address current research gaps while offering valuable insights for both industry professionals and policymakers. Presentation of the main material and substantiation of the obtained research results. Studying the presentation of the main material and the justification of the research results, it becomes obvious that the integration of different dimensions in the assessment of the competitiveness of the hospitality sector provides a deeper understanding of the complex dynamics of the industry. One of the main findings centers around the critical importance of customer satisfaction. Several studies highlight that satisfied customers not only contribute to positive online reviews and word-of-mouth recommendations, but also become loyal customers, ensuring repeat orders. Based on customer feedback, hospitality establishments can identify specific areas that need improvement, leading to improved guest experience and increased competitiveness (Bosovska and Vedmid, 2011).



Source: developed by the author.

Fig. 1. Characteristics of destination competitiveness

In addition, the study highlights the importance of service quality as a key component of competitiveness. Research shows that guests perceive high-quality service as a sign of a well-run establishment, leading to increased trust and satisfaction. Measuring service quality, covering factors such as responsiveness, reliability and empathy, allows businesses to identify gaps in service and implement targeted training programs for staff. This continuous

cycle of improvement not only improves the overall guest experience, but also strengthens the establishment's reputation, increasing its competitiveness in the market.

Another key aspect is the introduction of innovations in the field of hospitality. Research shows that innovative offerings, whether in the form of unique menu items, creative space design or advanced technology, attract customers and increase the overall appeal of the establishment. The introduction of innovations not only attracts technically literate customers, but also positions the business as a trendsetter in the industry (Simenko and Kosova, 2013). Such differentiation helps increase customer loyalty and strengthens the institution's competitive position among many options.

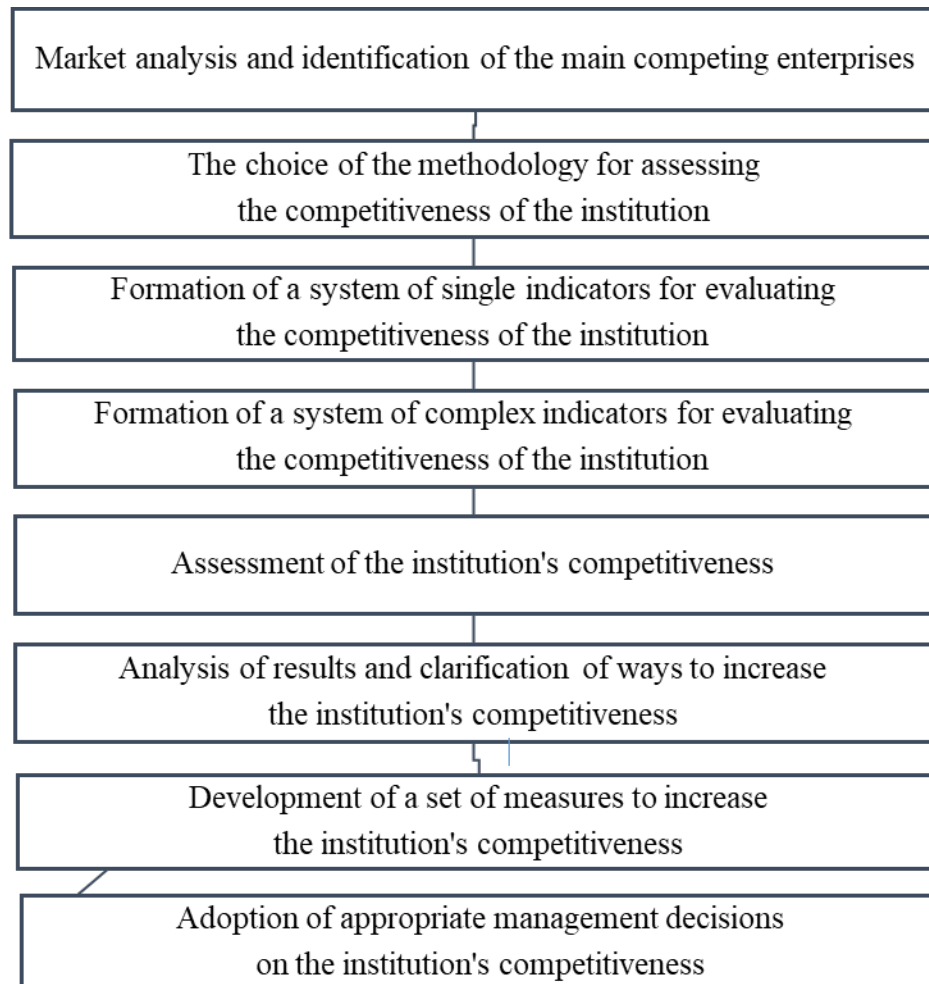
Financial analysis serves as an important substantiation of research results. Examining financial indicators such as RevPAR, ADR and profit margin provides valuable information about the economic health of hospitality establishments. Strong financial performance not only ensures business sustainability, but also facilitates strategic investments in staff training, technology upgrades and sustainability initiatives. By maintaining a strong financial foundation, institutions can survive economic instability and invest in the long-term competitiveness of their offerings (Borisova, 2012).

The integration of sustainable development practices becomes a convincing justification for the research results. In an era of growing environmental awareness, hospitality establishments that support environmental initiatives are greatly increasing their appeal. Research shows that guests are increasingly inclined to support businesses that demonstrate social and environmental responsibility. By implementing sustainable practices such as energy conservation, waste reduction and ethical purchasing, establishments are not only helping to preserve the environment, but also attracting a discerning customer base. This double benefit meets public expectations and strengthens the institution's competitiveness on the market.

Human resource management is a vital component of research outcomes. Research highlights the key role of well-trained and motivated staff in providing exceptional customer service (Bosovska and Vedmid, 2011). Employee satisfaction, training programs and a positive workplace culture directly impact service quality and guest experience. Organizations that invest in the well-being and professional development of employees create a dedicated workforce, which results in the provision of services of the highest quality. Satisfied employees are more likely to interact sincerely with guests, creating unforgettable impressions that increase the reputation and competitiveness of the establishment (Bortnyk, 2013; Kutsenko, 2012).

The main principles of assessing the competitiveness of a hospitality company are integrity, systematicity, objectivity, dynamism, continuity and

optimality. The diagram of the general order of research of the process of assessing the competitiveness of a hospitality enterprise is shown in Figure 2.



Source: developed by the author.

Fig. 2. Stages of assessing the competitiveness of a hospitality enterprise

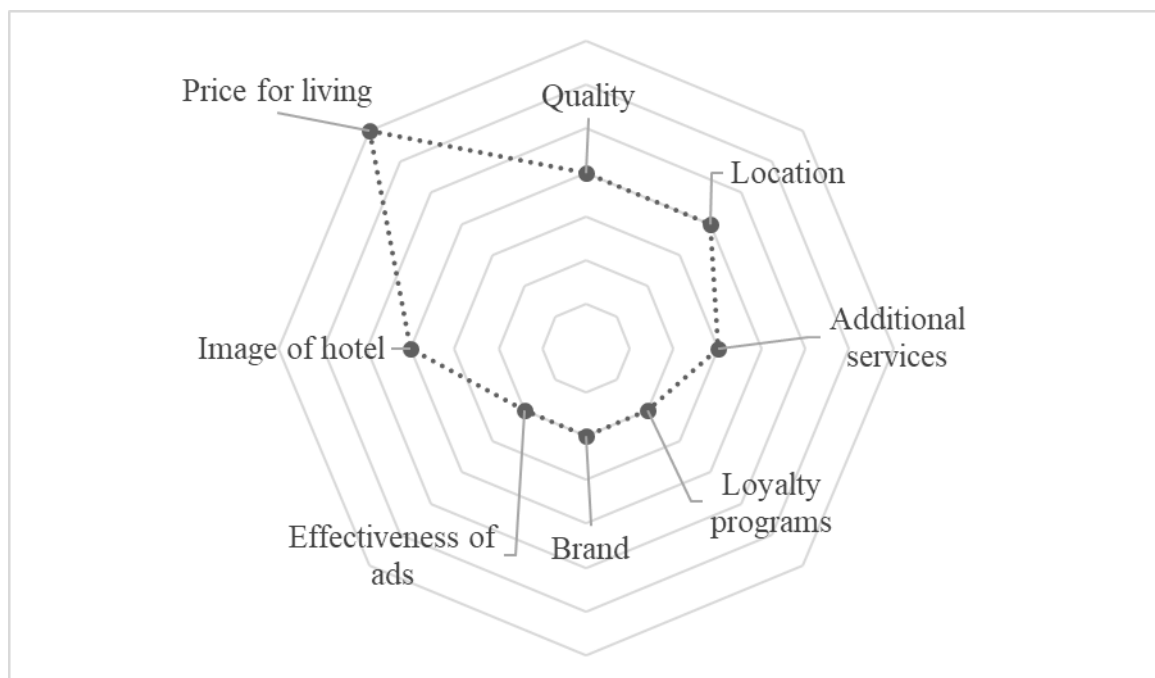
The evaluation of an enterprise's competitiveness relies on the selected assessment approach, and the specific set of indicators varies accordingly. There are nine broad categories encompassing generally accepted methods for assessment. These include methods focusing on comparative advantages, those grounded in the equilibrium theory of the firm and the industry, analyses of the market and identification of primary competitors, approaches derived from the theory of product quality, graphical methods, matrix methods, an expert-driven approach, methods assessing the enterprise's position from a strategic potential standpoint, and those comparing against established standards (Gavrilyuk, 2006).

However, it is important to note that these methods, which are used to assess competitiveness, are mainly developed for manufacturing enterprises.

When analyzing enterprises in the field of hospitality, the peculiarities of their intangible activity should be taken into account. Hospitality enterprises provide temporary accommodation services with mandatory maintenance, which distinguishes them from manufacturing enterprises.

One of the effective tools for comparing the capabilities of a hospitality company and its main competitors is the creation of a “competitiveness polygon”. This method consists in the graphic display of assessments of the state of the enterprise and its competitors according to the main areas of activity, presented in the form of vectors-axes.

The number of axes corresponds to the number of selected criteria, and they have a certain measurement scale (most often in the form of point estimates). The farther from the center of the coordinates the values of the criteria are, the higher they are. For each enterprise, a broken line is drawn, which forms a polygon, showing the difference between hotels according to individual criteria, as can be seen in Figure 3. The described method makes it possible to clearly display the difference between establishments, taking into account their main characteristics.

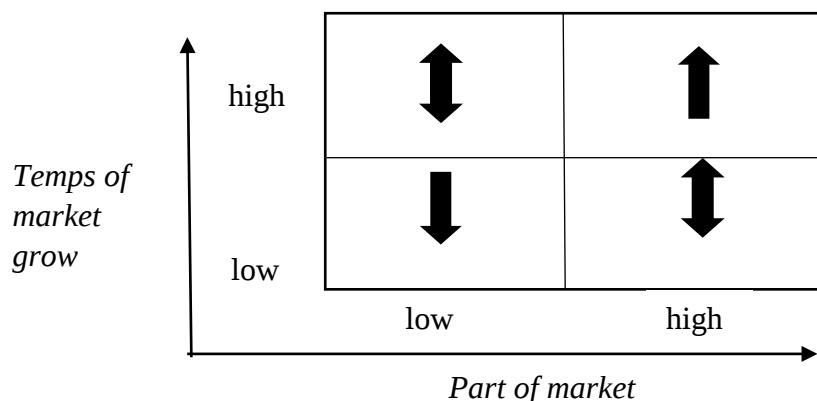


Source: (Bortnyk, 2013b).

Fig. 3. "Polygon of competitiveness" of hospitality establishments

From my point of view, the graphic method of assessing the competitiveness of an enterprise is impressive for its simplicity and visibility. However, it has a certain drawback – it does not provide an opportunity to determine the value of the general criterion of the enterprise's competitiveness.

Matrix methods of assessing the competitiveness of hospitality enterprises are based on the use of matrices, i.e. tables, where elements are arranged in rows and columns (Andreeva and Andreeva, 2009). This can be illustrated by a matrix created according to the principle of the "Boston Consulting Group" coordinate system (see Figure 3). In this matrix, market growth rates are displayed along the vertical, on a linear scale, and the hotel's relative market share is displayed along the horizontal, on a logarithmic scale.



Source: developed by the author.

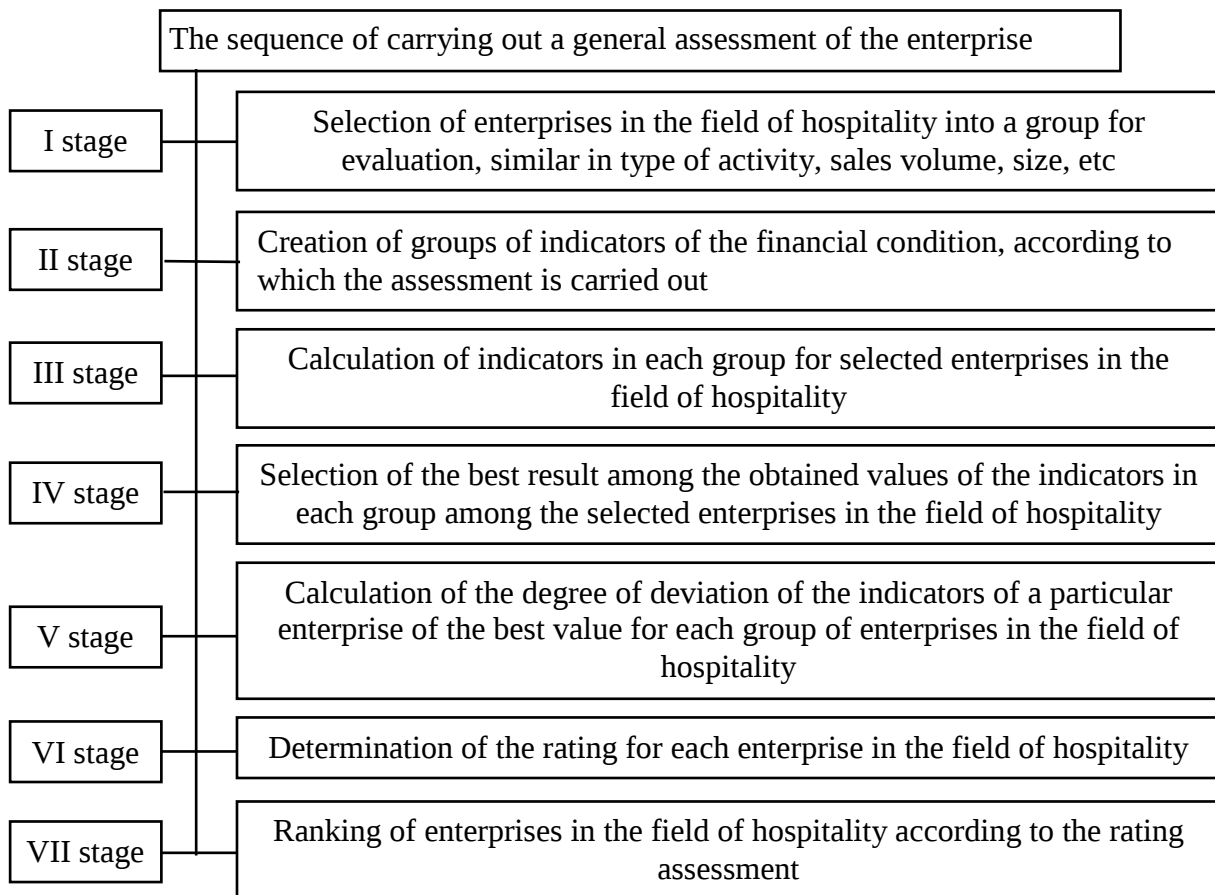
Fig. 4. General view of the Boston Consulting Group matrix

The most competitive are those enterprises that hold a significant share in the rapidly developing market. Various matrices can be used to assess the level of competitiveness of hospitality enterprises, such as the "Market Attractiveness/Competitiveness" matrix according to the GE/McKinsey model, the "Industry Attractiveness/Competitiveness" matrix according to the Shell/DPM model, the "Market Development Stage/Competitive Position" matrix according to by the Hofer/Schendel model, and the "Stage of the product life cycle/Competitive position" matrix by the ADL/LC model, and so on (Kuznetsova and Nezdoyminov, 2010).

The use of matrix methods for assessing competitiveness allows studying the dynamics of competition in the hospitality industry and provides an opportunity to obtain high-quality and representative results. However, it is important to note some shortcomings, in particular, the simplification of methods and the impossibility of conducting an in-depth analysis of the causes of specific phenomena, which can complicate the process of making management decisions.

Among the methods of evaluating the competitiveness of hotels, the rank method, the difference method, and benchmarking are distinguished. The ranking method allows you to determine the general position and strengths and weaknesses of enterprises in comparison with competitors. This method is based on the ranking of the achieved values of the indicators for each competitor

enterprise according to each evaluation parameter. It helps to determine in which criteria a hospitality business is ahead of its competitors and in which it is behind, although there is no quantitative assessment of lagging or ahead.



Source: developed by the author.

Fig. 5. Algorithm for general assessment of the financial condition of hospitality enterprises

To determine the best enterprise based on the criterion of the minimum number of ranks obtained, the places (ranks) are summed up according to all evaluation indicators. The main advantage of this method is its ease of use. However, this approach provides only an approximate result and does not allow assessing the exact level of the company's lagging behind the competitor.

In the method of difference, the advantages and disadvantages of enterprises in the field of hospitality are determined according to individual indicators. The company being analyzed is compared with one competitor. For each compared indicator, not only the company's position is determined, but also the quantitative gap in the achieved values. Based on the obtained data, it is possible to build a competitive profile of the hotel (Table 1).

Determining priorities makes it possible to highlight specific characteristics that the company should pay special attention to. One of the options for comparison, which is based on comparison with the ideal, is benchmarking (Gerasimenko, 2010). This process includes finding the most efficient competitive enterprise in order to adapt its best practices.

Table 1

Competitive profile of the hotel enterprise

Characteristics	Valuable %	Bad or better							Score	Priority
		-3	-2	-1	0	+1	+2	+3		
Price for living	30				●				-30	1 st level of priority
Quality	25					●			0	
Location	15						●		+15	
Additional services	10					●			0	
Efficiency of management	15				●				-15	2-nd level of priority
Ads efficiency	5				●				-5	3-d level of priority
Total	100								-35	

Source: (Bortnyk, 2013b).

The application of benchmarking can be divided into three main stages:

- 1) selection of an ideal competitor, determination of parameters for comparison and collection of necessary information for analysis;
- 2) comparison with an ideal hotel, identification of shortcomings in the studied benchmarking object and identification of their causes;
- 3) development and implementation of strategies to compensate for identified weaknesses of the enterprise.

Comparing various operating parameters and results of the enterprise with its main competitors through benchmarking allows not only to analyze the state of affairs at a certain moment in a strategic group of competitors, but also to predict possible development scenarios and develop appropriate strategies to strengthen positive aspects and reduce negative trends.

While studying the methods of assessing the competitiveness of enterprises, we came to the conclusion that the most objective result can be obtained with the help of a comprehensive assessment.

Conclusions and prospects for further research. To end up with, in this article, we considered different methodologies for assessing the competitiveness of hospitality establishments. The research examined the complexity of factors affecting competitiveness, from market analysis and strategic positioning to

benchmarking and comprehensive assessments. Obviously, these methodologies provide invaluable information that allows businesses to identify their strengths and weaknesses and make informed decisions.

One of the main conclusions is the need for a multifaceted approach. Quantitative data, while important, must be complemented by qualitative insights, including aspects such as customer satisfaction and brand perception. In addition, in the conditions of technological progress and changes in consumer preferences, the implementation of innovative technologies and sustainable practices becomes mandatory.

Competitiveness in hospitality is no longer limited to local or national markets; it is becoming more and more global. Thus, institutions must be tuned to international trends, cultural nuances and diverse customer expectations. In addition, the importance of social responsibility and environmental sustainability cannot be overstated. Business must demonstrate a commitment to ethical practices not only for the sake of competitiveness, but also as a responsible corporate citizen.

Despite the fact that some steps in the direction of assessing the competitiveness of enterprises in the hospitality sector have already been taken, to date scientists have not developed a universal methodology for comprehensive assessment of the competitiveness of enterprises. Growing trends in the development of the hospitality industry require additional research aimed at forming approaches to assessing the competitiveness of hospitality enterprises.

Several areas of future research can be distinguished:

Environmental Sustainability: Explore the role of sustainable practices in increasing competitiveness by considering environmental initiatives, waste reduction and energy efficiency in the hospitality business.

Consumer Behavior Analysis: Conducting in-depth research on the evolution of consumer preferences and consumer behavior, especially in the context of post-pandemic travel, to understand how these changes affect the competitive strategies of hospitality businesses.

Cross-Cultural Competence: Exploring the importance of cultural competence in hospitality and how establishments can adapt their offerings to effectively serve diverse international markets.

Policy Implications: To examine the impact of government policies, such as taxation, regulation and incentives, on the competitiveness of hospitality businesses in order to provide recommendations for policy makers and industry stakeholders.

Economic Impact: To analyze the economic impact of competitive hospitality establishments on the local and national economy, taking into

account factors such as job creation, revenue generation and tourism development.

By exploring these research perspectives, academics and industry experts can contribute to a deeper understanding of the changing nature of hospitality competitiveness, enabling businesses to thrive in an increasingly competitive global landscape.

REFERENCES:

Gavrilyuk, S. P. (2006). Konkurentospromozhnistj pidpryjemstv u sferi turystychnogho biznesu: navchalnyj posibnyk [Competitiveness of enterprises in the field of tourism business: educational manual]. Kyiv. 180 p. [in Ukrainian].

Gerasimenko, V. G. (2010). Ekspres-analiz jakosti ta konkurentospromozhnosti ghoteljnogho ghospodarstva kurortnogho mista [Express analysis of the quality and competitiveness of the resort city's hotel industry]. *Ekonomika rozvytku = Development economics*, № 3 (55), P. 35–40 [in Ukrainian].

Kuznetsova, N. M., Nezdoyminov, S. G. (2010). Reghionalnyj vymir rozvytku turystychnogho ta ghoteljnogho biznesu: monohrafija [Regional dimension of tourism and hotel business development: monograph]. Odesa: Astroprynt. 252 p. [in Ukrainian].

Bohdan, N. M., Ferliy, R. Yu. (2016). Osoblyvosti upravlinnja yakistju v ghoteljnomou biznesi [Features of quality management in the hotel business]. Lutsk: LNTU [in Ukrainian].

Bosovska, M. V., Vedmid, N. I. (2011). Avtomatyzacija procesu upravlinnja yakistju na pidpryjemstvakh ghoteljnogho ghospodarstva [Automation of the quality management process at hotel enterprises]. *Visnyk Mariupoljskogo derzhavnogho universytetu. Serija: Ekonomika = Bulletin of the Mariupol State University. Series: Economy*, Vol. 1, P. 87–91 [in Ukrainian].

Bortnyk, L. V. (2013a). Kompleksna ocinka konkurentospromozhnosti pidpryjemstv ghoteljnogho biznesu [Comprehensive assessment of the competitiveness of hotel business enterprises]. *Ekonomichnyj analiz = Economic analysis*, Vol. 14, No. 2, P. 100–110 [in Ukrainian].

Kutsenko, O. V. (2012) Yakist posluh hotelnykh pidpryemstv ta yikh spozhyvcha otsinka [Quality of services of hotel enterprises and their consumer estimation]. *Ekonomichna strateghija i perspektyvy rozvytku sfery torghivli ta posluh = Economic strategy and prospects for the development of trade and services*, Vol. 2 (16), No. 14, P. 323–332 [in Ukrainian].

Borisova, O. V. (2012). Tendenciji rozvytku ghoteljno-restorannogho biznesu v Ukrajinii [Trends in the development of the hotel and restaurant business in Ukraine]. *Ekonomichna strateghija i perspektyvy rozvytku sfery torghivli ta posluh = Economic strategy and prospects for the development of trade and services*, Vol. 1 (2), P. 331–338 [in Ukrainian].

Trofymenko, L. S., Munin, G. B., Gats, O. O. (2008). Franchajzyngh u ghoteljno-restorannomu biznesi: navch. posib. [Franchising in the hotel and restaurant business: training. manual] [in Ukrainian].

Simenko, I. V., Kosova, T. D. (ed.). (2013). Analiz ghospodarskoji dijalnosti: navchalnyj posibnyk [Analysis of economic activity: a study guide]. Centr uchbovoji literatury [in Ukrainian].

Gerasimchuk, V. G. (2003). Strateghichne upravlinnja pidpryjemstvom. Ghrafichne modeljuvannja: navch. posib. [Strategic management of the enterprise. Graphical modeling: education. manual] [in Ukrainian].

Andreeva, G. I., Andreeva, V. A. (2009). Orghanizacija i metodyka ekonomichnogho analizu: navchaljnyj posibnyk [Organization and methodology of economic analysis: study guide]. Sumy: DVNZ "UABS NBU" [in Ukrainian].

Bortnyk, L. V. (2013b). Metodyka otsinky konkrentospromozhnosti hotelnykh pidpriemstv [Methodology for evaluating the competitiveness of hotel enterprises] [in Ukrainian].

AUTHOR (S) BIOSKETCHES



Kuvika Ganna, Postgraduate student, Department of Management and Administration, Lesya Ukrainka Volyn National University, Lutsk, Ukraine.

<https://orcid.org/0009-0001-3469-8756>

E-mail: kuvika.hanna@vnu.edu.ua

COPYRIGHTS

©2023 The author(s). This is an open access article distributed under the terms of the Creative Commons Attribution (CC BY 4.0), which permits unrestricted use, distribution, and reproduction in any medium, as long as the original authors and source are cited. No permission is required from the authors or the publishers.

HOW TO CITE THIS ARTICLE

Kuvika, G. (2023). Methodological approaches to assessing the competitiveness of hospitality establishments. *Management*, 2(38): 107–120. <https://doi.org/10.30857/2415-3206.2023.2.9>.

JEL Classification:
L84

UDC 159.944:378

DOI: 10.30857/2415-
3206.2023.2.10

PROBLEMS OF PROFESSIONAL BURNOUT OF SCIENTIFIC AND PEDAGOGICAL WORKERS INSTITUTIONS OF HIGHER EDUCATION IN THE CONDITIONS OF WAR AND WAYS TO SOLVE THEM

Liudmyla HANUSHCHAK-YEFIMENKO¹

Liudmyla HALAVSKA¹, Oleksii BAULA²

Svitlana ARABULI¹

¹ Kyiv National University of Technologies and Design,
Kyiv, Ukraine

² National Academy of Management, Kyiv, Ukraine

Introduction. Modern life in conditions of full-scale war makes people more and more vulnerable. The fast rhythm of life is an inevitable companion of any goal-oriented and prosperous person in his career. Intense work in wartime mode and constant time pressure, the desire to do as many things as possible at the same time, increasing time requirements, exhaust the capabilities of the nervous system, which are not unlimited. Issues of prevention and management of stress at work are becoming more and more relevant, since the socio-economic and political situation changes quite quickly in war conditions, the requirements for the efficiency of any professional activity increase, and the neuro-psychological and informational loads increase. As a result, a long-term stress reaction occurs due to the effect on a person of chronic professional stress, which today is considered as a syndrome of "professional burnout". In this regard, the syndrome of "professional burnout" should be considered as a factor that leads to the deformation of the personality of a professional.

The hypothesis of the scientific research consists in the study of the problems of professional burnout of scientific and pedagogical workers of higher education institutions in the conditions of war and the development of recommendations on ways to solve them.

The purpose of the study is to substantiate the peculiarities of professional burnout of scientific

and pedagogical workers of higher education institutions in the conditions of war and ways of solving them.

The methodology of scientific research is general scientific research methods: comparison, expert analysis, grouping method, systematic approach. One of the effective methods for preventing the syndrome of "professional burnout" in the field of "people-to-people" professions is a properly organized and content-filled educational environment of a higher education institution in wartime conditions.

Conclusions and prospects for further research. The study defined the concept of "professional burnout". The main problems affecting the formation of the "professional burnout" syndrome of teachers of higher education institutions are characterized. The syndrome of "professional burnout" is revealed as a dynamic process and the stages of development are highlighted. The question of the influence of the peculiarities of the educational environment in the conditions of war and in general professional activity in the field of "person-to-person" professions on the development of professional burnout syndrome is highlighted.

KEYWORDS: higher education institutions; scientific and pedagogical workers; prevention of professional burnout; stress; stress resistance; spiritual burnout; physical burnout; moral burnout; martial law; therapy.

NUMBER OF REFERENCES	NUMBER OF FIGURES	NUMBER OF TABLES
16	0	2

JEL Classification:
L84

УДК 159.944:378

DOI: 10.30857/2415-
3206.2023.2.10

ПРОБЛЕМИ ПРОФЕСІЙНОГО ВИГОРАННЯ НАУКОВО-ПЕДАГОГІЧНИХ ПРАЦІВНИКІВ ЗАКЛАДІВ ВИЩОЇ ОСВІТИ В УМОВАХ ВІЙНИ ТА ШЛЯХИ ЇХ ВИРІШЕННЯ

Людмила ГАНУЩАК-ЄФІМЕНКО¹
Людмила ГАЛАВСЬКА¹, Олексій БАУЛА²
Світлана АРАБУЛІ¹

¹ Київський національний університет технологій
та дизайну, Київ, Україна

² Вищий навчальний заклад «Національна академія
управління», Київ, Україна

Вступ. Сучасне життя в умовах повномасштабної війни робить людей все більш вразливими. Швидкий ритм життя – неминучий супутник будь-якої цілеспрямованої та процвітаючої в кар'єрі людини. Напружена робота в режимі воєнного часу та постійного цейтноту, прагнення зробити якомога більше справ одночасно, підвищення вимог часу, виснажують можливості нервової системи, які не безмежні. Питання профілактики і керування стресами на роботі набувають все більшої актуальності, оскільки в умовах війни достатньо швидко змінюються соціально-економічна і політична ситуації, зростають вимоги до ефективності будь-якої професійної діяльності, збільшуються нервово-психічні й інформаційні навантаження. Як результат, внаслідок дії на людину хронічних професійних стресів виникає довготривала стресова реакція, яка на сьогоднішній день розглядається як синдром «професійного вигорання». У зв'язку з цим синдром «професійного вигорання» слід розглядати як чинник, що призводить до деформації особистості професіонала.

Гіпотеза наукового дослідження полягає у дослідженні проблем професійного вигорання науково-педагогічних працівників закладів вищої освіти в умовах війни та розробці рекомендацій щодо шляхів їх вирішення.

Метою дослідження є обґрунтування особливостей професійного вигорання

науково-педагогічних працівників закладів вищої освіти в умовах війни та шляхів їх вирішення.

Методологією наукового дослідження є загальнонаукові методи дослідження: порівняння, експертного аналізу, метод групування, системний підхід. Одним із ефективних методів для профілактики синдрому «професійного вигорання» у сфері професій типу «людина-людина» є правильно організоване та змістовно наповнене освітнє середовище закладу вищої освіти в умовах війни.

Висновки та перспективи подальших досліджень. В дослідженні визначено поняття «професійного вигорання». Охарактеризовано основні проблеми, що впливають на формування синдрому «професійного вигорання» викладачів ЗВО. Розкрито синдром «професійного вигорання» як динамічний процес та висвітлено стадії розвитку. Висвітлено питання впливу особливостей освітнього середовища в умовах війни та загалом професійної діяльності у сфері професій типу «людина-людина» на розвиток синдрому професійного вигорання.

КЛЮЧОВІ СЛОВА: заклади вищої освіти; науково-педагогічні працівники; профілактика професійного вигорання; стрес; стресостійкість; духовне вигорання; фізичне вигорання; моральне вигорання; воєнний стан; терапія.

Statement of the problem Undoubtedly, people-to-people professions require from their representatives, in addition to professional competencies, emotional intelligence, stress resistance, and moral and willpower qualities. The high demands and emotional burdens faced by teachers of higher education institutions contain the danger of complex experiences related to work situations and the possibility of professional stress.

The intensive development of modern innovative educational technologies, mobile Internet resources, and social networks has led to the constant, 24-hour availability of teachers who do not have time for rest, self-recovery of their physical and psychological health. Representatives of many other professions have clearly standardized working hours. What cannot be said about teachers of higher education institutions, especially in the conditions of war. Such a difficult situation leads to the general exhaustion of the personality, to the process of its multifaceted "burnout".

Analysis of recent research on the problem The analysis of domestic and foreign literature showed that a significant number of publications are devoted to the problems of the syndrome of "professional burnout" and the successful formation of the professional career of employees of educational organizations. In particular, a number of scientific works are aimed at the development and improvement of methods for diagnosing the syndrome of "professional burnout". In view of the growing number of studies, the problem of preventing the syndrome of "professional burnout" of teachers of higher education institutions has not lost its relevance, especially in wartime conditions.

According to the definition of the World Health Organization, "burnout" syndrome is a physical, emotional or motivational exhaustion, characterized by impaired productivity at work and fatigue, insomnia, increased susceptibility to somatic diseases, as well as the use of alcohol or other psychoactive substances with in order to obtain temporary relief, which tends to develop physiological dependence and (in many cases) suicidal behavior. "Emotional burnout" is a reaction of the physiological and psychological spheres of a person, which arises as a result of prolonged exposure to medium-intensity stresses caused by his leading activities. The syndrome of "emotional burnout" is a complex psychophysiological phenomenon, which is defined as emotional, mental and physical exhaustion due to prolonged emotional stress.

Thus, in the conditions of the war, the problem of "emotional professional burnout" of teachers of higher education institutions has already become a global problem.

The purpose of the study there is study of the problem of professional burnout of scientific and pedagogical workers of higher education institutions in the conditions of war.

Presentation of the main material The general idea of the psychology of the educational and industrial environment is primarily aimed at eliminating stress, since, according to experts (Sydorchuk, 2016; <http://stud.com.ua>), it is stress that often becomes the cause of mistakes and injuries. In a state of stress, a person's sleep, coordination of movements, the ability to make decisions are often disturbed, and the general working capacity and efficiency of activities decrease. Thus, by reducing the effect of all stressful factors, we can obtain not only a significant improvement in the quality of work, but also a significant reduction in injuries, and therefore the associated financial costs.

Stress is inherent in any profession, in particular, related to intellectual workload. In general, the concept of "stress" has more than 40 different definitions. According to G. Selye, stress is a non-specific reaction of the body in response to a very strong external action (stress factor) that exceeds the norm, as well as a corresponding reaction of the nervous system. According to the classification of G. Selye, the development of a stressful state has three stages:

1. The stage of anxiety causes mobilization of the body, during which biological reactions occur, which determine the possibility of fighting or fleeing. Physiological changes occur: narrowing of blood vessels, thickening of blood, increased pressure, outflow of blood from the skin, enlargement of the liver, spleen, increased work of the kidneys, etc.

2. Stage of resistance. The body tries to resist or cope with the threat. If the threat continues and cannot be avoided, the body adapts to the stress and continues to work under the changed conditions.

3. Stage of exhaustion (disorganization). If the effect of stress continues and the person is unable to adapt, it depletes the body's resources. The same reactions that allow you to resist short-term stressors (increased muscle tension, preventing signs of pain, stopping digestion, high blood pressure) are harmful in the long term.

One of the types of stress is professional stress, which manifests itself in psychological and somatic reactions to stressful situations in a person's professional activity. According to the results of the study, 81% of Ukrainians feel stressed at the workplace. The most dangerous for a person is the development of chronic stress, its manifestations are listed in the Table 1.

Against the background of chronic professional stress, the syndrome of professional burnout develops as a set of negative experiences related to professional activity, the team, the organization; this condition leads to the exhaustion of the emotional, energetic and personal resources of a person, which potentiates the deformation of the personality of the professional. According to the latest researches, the teaching profession is included in the risk group of occupational stress (<http://studopedia.com.ua>; Pines and Aronson, 1988; Brill, (1984). The activity of a teacher of secondary education, which belongs to the

sphere of "person – person", due to its oversaturation with stressogenic factors, requires a specialist to have powerful reserves of self-regulation, and that is why it belongs to the most emotionally stressful types of work. Professional burnout of teachers consists of the following components: feeling of professional incompetence; frustration; emotional exhaustion; professional deformation; professional marginalism. Risk groups for the occurrence of professional burnout syndrome among teachers of higher education institutions are employees who: recently started work and have not yet sufficiently adapted to their duties, team, corporate culture; work for a long time, who have already developed stereotypes of perception and behavior; have a low level of professional competence; have a very high level of requirements, perfectionists and workaholics; have a high level of the following psychological properties: neuroticism, anxiety, rigidity, conflict and a low level of self-esteem, self-efficacy; have constant problems outside of work (health, family, etc.). Thus, the main task facing managers and first of all as a professional person, there is a prevention of the occurrence of professional stress and the syndrome of professional burnout that follows. Employees of Ukrainian companies use ignoring it, playing sports and using sedatives as the main method of combating professional stress, only 2% turn to a psychologist (<http://studopedia.com.ua>). In recent decades, the concept of stress management has been formed – it is the competent management of one's condition and behavior during severe physical or psychological stress. There are several methods and means of overcoming psychological, including industrial stress (Table 2).

Table 1

Symptoms of chronic stress

Manifestations in the field of thinking • loss of concentration, subjective feeling of "weakening of memory" • easy distraction • loss of initiative, professional interests • negative thoughts • tendency to make hasty decisions or postpone decision-making	Manifestations at the level of behavior • anxiety, fussiness, which prevents concentration on the task • loss of appetite or overeating • restless sleep • conflict • increase in absences from work • tendency to accidents • evasion of responsibility • abuse of smoking, alcohol, addiction to tranquilizers and sleeping pills
Psychovegetative symptoms • shortness of breath, persistent headaches • increased heart rate, high blood pressure • upset stomach, nausea • increased fatigue • vague pains in different parts of the body • tendency to allergic reactions, skin rash • frequent colds • double vision	Manifestations in the field of emotions • confusion, irritation • bad mood, rapid mood changes • indecisiveness, lack of enthusiasm • inability to feel sympathy for other people • loss of confidence, low self-esteem • dissatisfaction with work and life in general, feelings of fatigue

Table 2

Methods of overcoming stress

Types of stress factors	Coping means
the realm of wise acceptance	• muscle relaxation • deep breathing • visualization – use of positive images • rational therapy • rayraming
area of constructive actions	• choosing the right strategy • setting an adequate goal • special skills training • time management training
the area of subjective stress	• overcoming the evaluation approach • positive thinking skills • changing inadequate beliefs • blocking unwanted thoughts
area of self-regulation	• autotening • neurolinguistic programming • self-confidence training • relaxation • breathing techniques • biological feedback (biofeedback)

The methods of self-regulation and self-management are probably the most important for teachers of higher education institutions.

Mental self-regulation is a person's ability to purposefully change the work of various psychophysiological functions, which requires special means of reality control.

Pedagogical activity, due to its oversaturation with stressogenic factors, requires a specialist to have powerful reserves of self-regulation, and that is why it is one of the most emotionally stressful types of work. In this regard, one of the negative consequences of long-term stress is the syndrome of professional burnout (Meshko, 2012).

Modern scientists define the syndrome of "professional burnout" as a personal deformation caused by professional stress. The vast majority of researchers see the main cause of professional burnout in the so-called "chronic fatigue syndrome", which is accompanied by psychosomatic and somatopsychic disorders. The key component of the syndrome of "professional burnout" is the discrepancy between the personality and the demands placed on it. Today, almost all groups of specialists in "communicative" professions, professions of the "human-human" type (teachers, medical workers, military personnel, educators, actors, service workers, etc.) have people with a high and medium level of "burnout". This problem is quite acute for teachers of higher education, who are subjected to intense deforming influence. This is connected, first of all,

with the peculiarities of professional activity, as well as the lack of conditions in higher education to relieve psychological fatigue, insufficient competence in matters of maintaining and strengthening professional health.

Currently, the work of a teacher at a higher education institution is in the "risk group", it is characterized by tension, increased responsibility, and the obviousness of a wide range of duties, which causes its chronic stress. After all, the professional activity of a teacher obliges to have a high level of professionalism, to easily and quickly adapt to the complex conditions of pedagogical activity and to respond adequately to various circumstances. It is appropriate to point out that the level of professional burnout among teachers of higher education institutions, due to the specificity of the profession, is considered one of the highest. This is evidenced by the results of empirical research, which proved that the majority of teachers are characterized by a high and medium level of manifestation of the syndrome of "professional burnout" (<http://stud.com.ua>; Pines and Aronson, 1988; Brill, (1984). Most often, "professional burnout syndrome" occurs in "soft", humane people who are more inclined to compassion. At the same time, "professional burnout syndrome" is dangerous for authoritarian, emotionally cold and restrained people who have a low level of empathy (<http://studopedia.com.ua>; Schaufeli, Maslach and Marek, 1993).

The following external and internal causes of teacher burnout are identified.

External reasons:

1. Corporate culture: multi-tasking, overloading, the need to perform duties that go beyond the functional duties at the workplace, regular reporting within the specified deadline, the possibility of punishment for failure to complete tasks on time, constant deviations in the authoritarian style of management.

2. Destabilizing organization of activities: constant innovations, role uncertainty, constantly tense rhythm of work, irregular working hours.

3. Intense psycho-emotional activity: a heavy contingent of students and colleagues, the need for constant intensive communication with people.

4. Constant requirements for high personal responsibility in the workplace.

5. Insufficient financial remuneration for the performed activity, which is subjectively perceived as unsatisfactory.

6. Lack of psychological reward, which is perceived by a person as the uselessness of his work for society.

7. Independence of remuneration from the efforts and personal contribution of the employee.

8. Unfavorable psychological atmosphere of professional activity, determined by conflict between the boss and subordinates, and between colleagues.

9. High level of rivalry in the team.
10. Uniformity of duties, long stay (more than 5 years) in the position.
11. Feeling of instability, fear of losing one's workplace.
12. New working conditions, the need to demonstrate high efficiency at the new workplace.

Internal reasons:

1. Increased nervousness and anxiety in war conditions.
2. Increased vulnerability and sensitivity, which can completely block the mechanism of psychological protection.
3. Very high level of empathy.
4. Emotional rigidity. Emotional burnout occurs more often in those who are less reactive and expressive and more emotionally restrained. People with impulsive burnout syndrome develop more slowly.
5. Increased personal and social levels of responsibility.
6. Weak professional orientation, low motivation of emotional return in professional activity.
7. Low self-esteem.
8. Low self-efficacy.
9. The internal need to always "be a role model" – to radiate energy, professionalism and self-confidence every minute, to look good.
10. An idealistic attitude to work, a tendency to dream, which leads to the use of emotional burnout as a mechanism of psychological protection.
11. Ethical defects and personal disorientation.

The main factors affecting the formation of the syndrome of professional burnout among teachers of higher education are:

- personal factor (tendency to compassion, idealistic attitude to work, at the same time instability, tendency to daydream, obsession with obsessive ideas; empathy, humanity, softness, idealization, introversion, fanaticism, etc.). Seniority, marital status, and age do not affect professional burnout. However, psychologists believe that the syndrome of professional burnout is more common in women than in men. Since women are more prone to the emotional experience of failures both in professional activities and in personal life;

- the role factor manifests itself in role conflict and role uncertainty. A team in which the responsibilities of employees are clearly divided will be much less prone to burnout, compared to others;

- organizational factor (indifference to one's duties reflected at work, dehumanization in the form of negativism towards both students and colleagues, a sense of one's own professional incapacity, dissatisfaction with work, depersonalization phenomena). The syndrome of professional burnout is directly related to the need for intensive communication, supported by emotions, intensive perception, processing and interpretation of information, decision-

making. Also, professional burnout is caused by an unfavorable atmosphere in the team, incorrect organization and planning of activities, conflicts in the team, "difficult students".

It is especially emphasized that the set of signs and symptoms of professional burnout in each individual case may vary depending on the individual characteristics of the employee, the characteristics of his social and psychological environment and working conditions.

Professional burnout is most often observed in young teachers, as they demand effective work from themselves, if the teacher does not achieve the desired result in working with students and colleagues, he has feelings of incompetence and dissatisfaction with the chosen profession. Teachers with more experience are more likely to experience mental and physical exhaustion than emotional exhaustion.

Research Findings and Prospects In order to avoid such negative dynamics and maintain health and a high level of work capacity, it is desirable for a teacher of higher education institutions to prevent "emotional and professional burnout" by applying, in particular, a comprehensive approach based on the theoretical research of modern scientists (<http://stud.com.ua>; <http://studopedia.com.ua>; Pines and Aronson, 1988; Brill, (1984). In a comprehensive approach, we see the correction of the teacher's mental, physical and spiritual health.

I. Recommendations for correction of the physical component.

1. The simplest, universal way to restore personality and the primary need of the human body is an established sleep regime (8 hours). After all, a constant lack of adequate sleep, due to excessive teacher overload, leads to negative acquired habits and stimulates the development of "professional burnout".

2. Diet according to the biological rhythm and the teacher's regimen. Balanced and healthy food is a guarantee of not only physical but also emotional health of a specialist.

3. Physical activity, namely: sports, morning gymnastics, yoga, fitness, dancing, etc.; massage – will help to restore strength as quickly as possible and will allow to relieve the tension of the whole body.

4. Aromatherapy is a method of therapy using essential oils that are introduced into the body through the respiratory tract (inhalation, inhalation) and through the skin (massage, compress, etc.). This method has a beneficial effect on the human body (smells of citrus fruits, bergamot, spices have a positive effect on the nervous system, there is a feeling of invigoration).

5. Breathing exercises (respiratory gymnastics, bodyflex, etc.) tone the nervous and vascular systems, increase blood circulation, contribute to the formation of the ability to concentrate, eliminate psycho-emotional stress and their consequences.

II. Recommendations for correction of the mental component.

1. Art therapy is a type of psychotherapy and psychological correction based on art and creativity. A special place should be given to "color treatment" isotherapy. The use of green and blue colors promotes relaxation, red and yellow when there is a need to renew energy. Music therapy also contributes to the harmonization of the psycho-emotional state and helps to get rid of negative emotions.

2. Keeping a diary with introspection. It is appropriate to make records of both positive and negative changes and reactions to certain events.

3. Time management consists in planning and correcting the activity schedule for the week. This technique will help the teacher to correctly allocate time for work and rest, without missing anything.

4. Positive psychology is based on positive constructive thinking of the individual, avoiding the use of negative clichés, in order to successfully achieve clearly defined productive goals.

III. Recommendations for correcting the spiritual component.

1. Communicating with family, friends, nature, animals (the environment always helps restore strength and energy).

2. Various trips enrich and diversify life. It is advisable to combine the trip with a visit to an interesting scientific conference, to expand the scientific worldview and expand communication platforms.

It is common knowledge that professional burnout of an employee is most dangerous at the beginning of its development. A "burning out" employee, as a rule, is hardly aware of his symptoms, so changes in his behavior are the first to be noticed by colleagues. That is why it is very important for managers and colleagues to notice such manifestations in a timely manner and properly organize a support system for these employees. According to experts, the prevention and correction of mental burnout should include inculcating in the personality the skills of adequate emotional response to external and internal circumstances. Self-control skills, the ability to work with one's own negative emotions, and the ability to express feelings and emotions freely and naturally are important.

REFERENCES:

Meshko, H. M. (2012). Vstup do pedahohichnoi profesii: navch. posib. dlia stud. vyshch. navch. zakladiv [Introduction to the teaching profession: a study guide for students of higher educational institutions]. Kyiv: Akademvydav. 200 p. URL: <https://textbook.com.ua/pedagogika/1473451769> [in Ukrainian].

Prykhodko, V. V., Samoilov, M. H., Shabanova, Yu. O. (2014). Fizychna kultura ta psykhofizychnyi treninh studentiv: vid teorii do praktyky: navch. posibnyk [Physical culture and psychophysical training of students: from theory to practice: a study guide]. D.: NHU. 275 p. [in Ukrainian].

Sydorchuk, N. H. (2016). Fizychna kultura i psykholohichniy treninh: navch. posibnyk [Physical culture and psychological training: a study guide]. Zhytomyr: Vyd-vo ZhDU im. I. Franka. 96 p. [in Ukrainian].

Faktry, yaki vyznachaiut zdorovia [Factors that determine health]. URL: http://stud.com.ua/4084/meditsina/osnov_zdorovogo_sposobu_zhittya_studentiv#897 [in Ukrainian].

Fizyчне, psykhiчне, dukhovne, sotsialne zdorovia [Physical, mental, spiritual, social health]. URL: http://studopedia.com.ua/1_59223_fizichne-psiichne-duhovnesotsialne-zdorovya.html [in Ukrainian].

Schaufeli, W. B., Maslach, C., Marek, T. (Ed.) (1993). Professional burnout: Recent developments in theory and research. Washington DC: Taylor & Francis. 292 p.

Pines, A. M., Aronson, E. (1988). Career burnout: Causes and cures. New York: Free Press. 257 p.

Brill, P. L. (1984). The need for an operational definition of burnout. *Family and Community Health*, № 6, P. 12–24.

Maslach, C., Leiter, M. P. (2000). Burnout. *Encyclopedia of Stress*. Ed. by George Fink. San Diego: Academic Press. Vol. 1. A-D. 758 p.

Green, D. E., Walkey, F. H., Taylor, J. (1991). The three-factor structure of the Maslach Burnout Inventory: A multicultural, multinational confirmatory study. *J. of Social Behavior and Personality*, Vol. 6 (3), P. 453–472.

Garden, A.-M. (1987). Depersonalization: A valid dimension of burnout? *Human Relations*, Vol. 40 (9), P. 545–560.

Pines, A. M., Aronson, E., Kafry, D. (1981). Burnout: from tedium to personal growth. New York: Free Press. 229 p.

Jones, J. W. (1980). Preliminary manual: The staff burnout scale for health professional. Park Ridge, IL: London House. 36 p.

Cherniss, C. (1980). Professional burnout in human service organizations. New York: Praeger. 233 p.

Etzion, D. (1987). Burnout: The hidden agenda of human dis tress, II BR series in Organizational Behavior and Human Resources. Working paper no 930/87. Israel: The Israel Institute of Business Research, Faculty of Management, Tel Aviv University. P. 16–17.

Burisch, M. (2006). Das Burnout-Syndrom. Theorie der inneren Erschöpfung. Berlin: Heidelberg Springer Medizin Verlag. 314 s.

AUTHOR (S) BIOSKETCHES



Hanushchak-Yefimenko Liudmyla, Doctor of Economics, Professor, Vice-Rector for Research and Innovation, Kyiv National University of Technologies and Design, Ukraine

<https://orcid.org/0000-0002-4458-2984>

Scopus Author ID: 35758920800

Researcher ID: Q-2309-2016

E-mail: glm5@ukr.net

	Halavska Liudmyla, Doctor of Technical Science, Professor, Department of Textile Technology and Design, Kyiv National University of Technologies and Design, Ukraine https://orcid.org/0000-0002-6994-6641 Scopus Author ID: 57191413261 ResearcherID: O-1750-2018 E-mail: galavska.ly@knuutd.edu.ua
	Baula Oleksii, Candidate of Economic Sciences, Associate Professor of the Department of International Economic Relations, National Academy of Management, Kyiv, Ukraine Scopus Author ID: 57914956800 E-mail: shkirka2002@ukr.net
	Arabuli Svitlana, PhD in Technology, Associate Professor, Department of Textile Technology and Design, Kyiv National University of Technologies and Design, Ukraine. https://orcid.org/0000-0003-1049-8255 Scopus Author ID: 54405479200 E-mail: arabuli.si@knuutd.edu.ua

COPYRIGHTS

©2023 The author(s). This is an open access article distributed under the terms of the Creative Commons Attribution (CC BY 4.0), which permits unrestricted use, distribution, and reproduction in any medium, as long as the original authors and source are cited. No permission is required from the authors or the publishers.

HOW TO CITE THIS ARTICLE

Hanushchak-Yefimenko, L., Halavska, L., Baula, O., Arabuli, S. (2023). Problems of professional burnout of scientific and pedagogical workers institutions of higher education in the conditions of war and ways to solve them. *Management*, 2(38): 121–132. <https://doi.org/10.30857/2415-3206.2023.2.10>.

JEL Classification:
J44

UDC 338.001.36:
69.003:691

DOI: 10.30857/2415-
3206.2023.2.11

FEATURES PREPARATION OF THE PROJECT MANAGER IN THE ARCHITECTURE AND CONSTRUCTION INDUSTRY

**Dmytro MAKATORA¹, Oleksii YASHCHENKO²,
Ruslan KUBANOV²**

¹ National Technical University of Ukraine "Igor Sikorsky Kyiv
Polytechnic Institute", Ukraine

² Separate structural subdivision "Institute of Innovative
Education of the Kyiv National University of Civil Engineering
and Architecture", Ukraine

INTRODUCTION: The architectural and construction sphere is very relevant in the modern world with numerous social, economic and technological challenges. A special role in the industry is played by the activities of the manager and its specificity. The management of domestic architectural and construction enterprises is interested in the presence of qualified economic professionals who could professionally carry out management tasks, including planning and operational management of all aspects of economic and production activities of the organization, marketing research, price and commodity policy, as well as financial activities and financial activities resources.

FORMULATION OF THE ARTICLE OBJECTIVES. The purpose of the study is to identify and analyse the theoretical and practical features of the activity of a manager in the architectural and construction industries.

RESEARCH HYPOTHESIS: Architecture and construction manager has a combination of theoretical and practical skills that are needed for successful activities. The peculiarities of this role include several areas of activity, including theoretical knowledge, project management, understanding of legal aspects, leadership and communications skills, financial management, technical knowledge and innovative approach. This scientific and applied constant is a benchmark for the selection of managers in domestic architectural and construction enterprises and requires description, concretization and verification in practice.

METHODS: analysis of literature – review of scientific publications, journals, books and other

sources for collecting and analyzing information about this topic of research; system analysis – study of the object of study as a complex system with interconnected elements; deductive and inductive methods – the use of logical thinking to derive general principles or conclusions from specific facts or data; The interdisciplinary approach is the integration of knowledge, methods and practices in different disciplines to solve a certain problem. The combination of these methods ensures the quality of the study.

CONCLUSIONS: The manager in the architectural and construction industry plays a critical role in managing construction projects and enterprise development. This position requires a combination of theoretical knowledge of architectural and construction processes with practical skills in project management. The peculiarities of this role include several areas of activity, including theoretical knowledge, project management, understanding of legal aspects, leadership and communications skills, financial management, technical knowledge and innovative approach. Ukraine has considerable potential in the development of the architectural and construction industry, and managers in this area have an important role in the realization of this potential. Ensuring effective management of construction and development projects will contribute to the sustainable and progressive development of the Ukrainian economy.

KEYWORDS: architecture and construction industry; manager; project; management decisions; risks; construction technologies; construction standards and regulations; architectural and engineering solutions.

NUMBER OF REFERENCES	NUMBER OF FIGURES	NUMBER OF TABLES
20	0	0

JEL Classification:
J44

УДК 338.001.36:
69.003:691

DOI: 10.30857/2415-
3206.2023.2.11

ОСОБЛИВОСТІ ПІДГОТОВКИ ПРОЕКТНОГО МЕНЕДЖЕРА АРХІТЕКТУРНО-БУДІВЕЛЬНОЇ ГАЛУЗІ

Дмитро МАКАТЬОРА¹, Олексій ЯЩЕНКО²,
Руслан КУБАНОВ²

¹Національний технічний університет України
«Київський політехнічний інститут імені Ігоря
Сікорського», Україна

²Відокремлений структурний підрозділ «Інститут
інноваційної освіти Київського національного
університету будівництва і архітектури», Україна

ВСТУП: архітектурно-будівельна сфера є дуже актуальною в сучасному світі з численними суспільними, економічними та технологічними викликами. Керівництво вітчизняних архітектурно-будівельних підприємств зацікавлено в наявності кваліфікованих економічних фахівців, які могли б професійно виконувати управлінські функції, включаючи планування, організацію та оперативний контроль за всіма аспектами господарської та виробничої діяльності маркетингової аналітики, цінової та товарної політики, а також фінансової діяльності.

МЕТА ДОСЛІДЖЕННЯ: визначити та проаналізувати особливості підготовки проектного менеджера архітектурно-будівельної галузі.

ГІПОТЕЗА ДОСЛІДЖЕННЯ: проектний менеджер у сфері архітектури та будівництва формує загальні та спеціальні компетенції які охоплюють економіко-управлінські та фахові компетенції. Особливості цієї ролі включають декілька напрямків діяльності, зокрема теоретичні знання, управління проектами, розуміння правових аспектів, навички у лідерстві та комунікаціях, фінансове управління, технічні знання та інноваційний підхід. Ця науково-прикладна константа є орієнтиром для відбору менеджерів у вітчизняних архітектурно-будівельних підприємствах та потребує опису, конкретизації та перевірки на практиці.

МЕТОДИ: аналіз літератури – огляд наукових публікацій, журналів, книг та інших джерел для збирання та аналізу інформації про дану тему дослідження; системний аналіз – вивчення об'єкта дослідження як складної

системи з взаємозв'язаними елементами; дедуктивний та індуктивний методи – використання логічного мислення для виведення загальних принципів або висновків із конкретних фактів чи даних; міждисциплінарний підхід – інтеграція знань, методів і практик з різних дисциплін для розв'язку визначеної проблеми. Комбінування цих методів забезпечує якість проведеного дослідження.

ВИСНОВКИ: менеджер у архітектурно-будівельній галузі відіграє ключову роль в проектному управлінні будівельними об'єктами та розвитку підприємства. Ця посада вимагає поєднання теоретичних знань про архітектурні та будівельні процеси з практичними навичками в управлінні проектами. Особливості цієї ролі включають декілька напрямків діяльності, зокрема теоретичні знання, управління проектами, розуміння правових аспектів, навички у лідерстві та комунікаціях, фінансове управління, технічні знання та інноваційний методи організації. Україна має значний потенціал у розвитку архітектурно-будівельної галузі, і менеджери в цій сфері мають відіграти ключову роль у воєнній та повоєнній відбудові. Забезпечення ефективного управління проектами будівництва сприятиме сталому і прогресивному розвитку української економіки в умовах воєнного та повоєнного відновлення.

КЛЮЧОВІ СЛОВА: архітектурно-будівельна галузь; менеджер; проект; управлінські рішення; ризики; будівельні технології; стандарти та нормативи у галузі будівництва; архітектурні та інженерні рішення.

Problem statement. In today's world, with its many social, economic and technological challenges, architecture and the construction industry are highly relevant. Here is a list of a few of the main points which underline its relevance:

1. There is a demand for sustainable expansion and redevelopment of the urban environment due to increasing urban populations and rapid urban growth. In the design and construction of residential, commercial and infrastructure facilities that meet the needs of developed urban areas, architects and construction professionals play a crucial role.

2. Environmental issues for sustainability: Increasing environmental awareness and the drive for sustainable development require the development of buildings that are energy efficient, minimise negative environmental impacts and use renewable materials and technologies.

3. Innovation and technological improvements: introducing the latest building materials, construction technologies and automated building systems develops the industry and ensures higher quality and more efficient construction projects.

4. Meeting global challenges: Modern challenges require adaptive architectural and construction solutions that can respond to changing conditions and needs, such as climate change, population migration, globalisation and pandemics. Thus, responding to the challenges of our time by developing a sustainable and innovative environment for consumption and work, architecture and construction remain highly relevant.

Another aspect is the activity of the manager of an architectural and construction company. In our opinion, managing various aspects of the business related to construction projects, production of building materials, organisation of work processes and personnel management are among the professional activities of the manager of an architectural and construction company. The manager needs to have a sound knowledge of both architecture and construction as well as business management. Developing and controlling a business strategy, planning and coordinating construction projects, analysing the market and managing marketing processes, managing the company's finances and resources, and ensuring a high level of quality of work and the development of the company are among the main responsibilities of a manager in an architecture and construction company. In addition, maintaining documentation, interacting with contractors, resolving legal issues, ensuring compliance with legislation and standards, managing staff and creating a favourable corporate culture are also the responsibilities of an architectural and construction manager. The role of the manager of an architectural and construction company therefore involves a number of important tasks that involve managing business processes, finances, resources and people to successfully deliver projects and develop the company.

In general, it is necessary to master the new rules of adapting to and interacting with the environment in the current conditions of operating architecture and construction companies in Ukraine. It is necessary to use modern approaches, principles, effective methods and tools of business management for successful functioning in the competitive environment. The management of domestic architectural and construction companies is interested in the availability of qualified economic specialists who could professionally perform management tasks, including planning and operational management of all aspects of the organisation's economic and production activities, market research, pricing and product policy, as well as financial activities and providing companies with credit resources.

Analysis of recent research and publications. This problem is not sufficiently treated in the modern research, there are no generalising works at all, but some aspects are identified in the researches of scientists, as they are presented in the following. In the works of Ukrainian scientists various aspects of this problem have been studied and presented, such as V. Karpov (2021); Y. Veligotska (2017); O. Pasko and M. Kravchenko (2023); O. Danchenko, V. Zanora (2019); S. Dunda, T. Rybachuk-Yarova and I. Tiukha (2022); I. Kurashova (2021); M. Savchyn (2020); O. Marchenko and D. Sushko (2018); L. Lukianova, I. Androshchuk and O. Banit (2019); R. Trach, H. Ryzhakova and V. Kryzhanovsky (2017); L. Zgalat-Lozynska and O. Zgalat-Lozynsky (2019); D. Chernyshev, E. Zayats and V. Kovalov (2018).

Formulation of the article objectives. The purpose of the study is to identify and analyse the theoretical and practical features of the activity of a manager in the architectural and construction industries.

Presentation of the main research material. An architectural and construction manager plays an important role in organising and managing construction and development projects. This position requires combining theoretical knowledge of architecture, construction and management with practical skills in these areas.

The most important theoretical aspects of the activities of an architectural and construction manager are the knowledge of building design, construction technologies, construction standards and regulations, architectural and engineering solutions. In addition, the manager will need to understand the technical aspects of construction, including structural calculations, materials specifications and technical aspects of construction. Practical aspects of the manager's activities include the ability to manage construction projects, planning, budget control, communication with clients and contractors, human resources management and conflict resolution. The manager must be able to assess risks and make management decisions aimed at achieving project objectives, and must have an understanding of the economic and legal aspects of construction.

An architectural and construction manager has both the theoretical and the practical skills that are essential for the successful performance of the role. This role is characterised by several areas of competence: theoretical knowledge, project management, legal knowledge, leadership and communication, financial management, technical knowledge and innovation.

Theoretical knowledge. An architectural and construction manager needs to understand the basic concepts of architecture and construction, including design principles, technical standards and regulations, construction materials and technologies. The manager should have an understanding of the principles of design, the cultural and historical contexts of architecture, and the processes of spatial planning and the composition of architectural objects. He or she should also have knowledge of technical standards and regulations, construction materials and technologies. This will enable him or her to understand the construction process, the choice of materials, their technical characteristics and the possibilities of using modern technologies in construction.

Thus, the profession of architect is a type of activity that contributes to satisfying the social, humanitarian and physiological needs of a person by creating comfortable living conditions. Historical periods when supporters of the art of architecture and construction study the lives of architects and the objects of their designs even after graduation are important examples of respect for the professions of architects and builders.

The main stages, which play an important role as examples in the professional portrait of a modern specialist, can be the historical styles of the Renaissance or Baroque: The role of professionals in the synthesis of the arts in the Renaissance was based on scientific generalisation and the combination of mathematical knowledge with the mastery of architectural design, painting and sculpture; in the Baroque period in Europe, architects were transformed from craftsmen into respected professionals and theorists, who became artists in society at the level of respected artists of the new era; in the 16th century in Europe, in addition to craftsmen and painters, the professions included architects, painters and sculptors with a scientific education, while the academies brought together architects who achieved extraordinary fame. At the beginning of the 17th century, professional training was rare in Ukraine; architects came from craftsmen's families or were employed by slave artists, painters and folk craftsmen. At Kyiv Academy and the Kharkiv Collegium, the appeal to foreign specialists with technical knowledge led to an understanding of the need to streamline the system of education for architects. The professional standards of architectural education in Ukraine were constantly changing throughout the 19th century. At the end of the 19th century, the status of the creative personality in Ukraine grew, which led to the high status of the architect, who changed from a free entrepreneur to a civil servant. In the 19th century, the professionalism of the architect as a town and

landscape architect was in evidence. The architect was considered a highly qualified professional in the late 19th and early 20th centuries. Today, as ever, the professional work of Ukrainian artists is important (Karpov et al., 2021, p. 60). To sum up, we can say that the role of professionals in the formation of Ukrainian architecture has been decisive in different historical periods. The training of architects in Ukraine has undergone constant changes. However, it has always been an important factor in the development of the profession. Ukrainian architects gained high status and recognition as creative individuals in the late 18th and early 19th centuries. Their professional work was considered to be of great importance, and there was recognition of their role in the shaping of the architectural environment.

The knowledge that is required for a modern architect and builder is very diverse and includes the following aspects:

1. Architectural design: the ability to develop and implement architectural concepts through the application of knowledge of structures, forms, materials, functionality and aesthetics.

2. Construction technology: knowledge of construction processes, properties of building materials, structures and technical systems, including communications, electricity, heating, ventilation, etc.

3. Urban design and planning: the ability to design and organise the spatial structure of cities and settlements, taking into account the needs of the community in developing urban and regional plans.

4. Historical aspects: understanding the development of architecture and construction in different historical periods, studying the works of prominent architects and analysing their influence on contemporary practice.

5. Sociocultural aspects: understanding and taking into account the social and cultural needs of those consuming and using buildings, as well as the impact of architectural solutions on the community and the environment. These are just a few of the aspects of knowledge that are important for the successful performance of the work of an architect and a building owner. Each of these aspects requires in-depth understanding and continuous learning, as the profession of architecture and the built environment is an evolving constant in a field where technological developments and societal needs require constant adaptation and new solutions.

Understanding the processes of spatial planning and the composition of architectural objects is one of the most important components of a manager's work in the architecture and construction sector. This will help the manager to interact with designers and architects, to manage the design process and to ensure that the project meets the requirements of the client. In particular, knowledge of the processes of spatial planning helps the manager to understand the basic principles of the organisation of space and to determine the rational

location of objects and functions within a building or an area. He or she will find the optimal size and proportions of rooms, and summarise the ideas of the designers, in order to find compromises between comfort and functionality. Understanding the composition of architectural objects also helps managers determine how to harmonise and balance the elements of an architectural project. In order to understand basic aesthetic principles and influence decisions, it is necessary to have a basic knowledge of the arrangement of different elements, their relationships and characteristics.

For example, it is advisable to develop an optimisation model that takes into account three key aspects of the problem (methods) and determines the stage-by-stage formation of the architectural image of the building as an integral environmental object, according to the methodology of an integrated approach to making architectural decisions for buildings. These stages include: the formation of the spatial structure of the building, the formation of its compositional structure, as well as the formation of the decorative and plastic, graphic and information and sign structure of the environment (Veligotska, 2017, p. 141). Ultimately, managers will be able to control the process of creating an architectural project, ensure the quality and timeliness of its implementation, and meet the needs and expectations of clients, if they understand the processes of spatial planning and composition of architectural objects.

Then there is project management: the management of a construction project is one of the most important aspects of the work of an architect and a construction manager. They must have knowledge of the methods of planning, organisation, control and execution of a project, taking into account budget, time and quality constraints.

Time, cost and quality of the final product are the main components of a successful project. At the beginning of project development, a specialist must do market research. This research helps to find out who the product's target audience is. It allows you to create solutions that meet the needs and expectations of future users. Market research helps the specialist to find out what the problems or needs are in the area in which he or she intends to work. It is a great way to focus on the development of products that will be truly useful and popular. Market research allows you to study your competitors, their products and their approaches to design. It is a great way to have an understanding of how you can be unique and how your product can be different from others on the market. This is important because market conditions are always in a state of flux (Pasko and Kravchenko, 2023, p. 82).

Project time management is the next step. Regardless of the size or industry, time management is a critical component to the success of any project. Effective management of this resource is the key to ensuring that work is completed on time. The ability to meet deadlines is key to the satisfaction of

clients and the maintenance of trust in a professional or an organisation. It is well known that delays in a project can have the effect of costing more than anticipated. This can have a negative impact on budgeting and profitability of the project (Dunda, Rybachuk-Yarova and Tiukha, 2022).

The ability to plan the time needed for a project is what gives a specialist the ability to calculate the budget. This is the next skill that a project manager needs to have. The project schedule is the basis for estimating the cost of resources. This includes working hours, salaries, materials and other costs associated with the project. Estimating the time frame helps you to understand the amount of resources required for the completion of the project. For example, how many hours will be required for concept development, prototyping, testing and debugging. If there are unexpected changes or delays in the project, you can also adjust the budget.

Problems, or risks, can arise during implementation because every project has its own strengths and weaknesses. Risks are the cause of project delays and cost overruns. The ability to identify risks is key to the successful management and delivery of projects with minimal negative impact. The identification of risks helps to identify in advance any possible problems or threats that may arise during the work. O. Danchenko and V. Zanora emphasise that, since change is inevitable in a project, the project manager needs to develop procedures for managing change using the approaches outlined above. As the analysis has shown, in the modern methodology of project management there are no methods for the quantification of changes (Danchenko and Zanora, 2019, p. 35).

The overall effectiveness of a project is made up of a number of components, the most important of which are efficiency and effectiveness. Effectiveness is used to measure economic efficiency. Cost-effectiveness is a measure of economic efficiency and is a comparison of costs with products and results. Efficiency is a measure of the content of the activities that are carried out. Effectiveness is a measure of the extent to which the intended results of the project have been achieved, how sustainable they are and what impact they have had on the environment. A good project provides a positive solution to the problems for which it was implemented and has a positive impact on the environment in which it operates (Marchenko and Sushko, 2018, p. 24). To sum up all the material, it is clear that it is important for managers in the architecture and construction industry to study and practise the key concepts and principles of project management that will help them to successfully translate their creative ideas into practical projects.

Understanding the legal issues involved: An understanding of building codes, local and national building regulations, zoning, permitting and regulatory processes is important in the construction industry.

According to I.M. Kurashova, it is correct to use the term "certification of responsible contractors" (Kurashova, 2021, p. 173) to determine whether specialists in the construction industry have the appropriate qualifications and to establish their compliance with the requirements for performing certain types of works or providing services. Currently, scholars and practitioners are considering international "soft law" instruments. These do not create legally binding standards, but gain their normative force through the recognition of societal expectations by states and other key stakeholders, including business (Savchyn et al., 2020, p. 7).

In the construction industry, therefore, it is essential to understand building codes, local and national building regulations, zoning, permitting and regulatory processes. Here are some of the most important legal aspects that need to be considered:

1. Building and construction codes: It is necessary to comply with the established building codes and regulations contained in the relevant regulatory documents in order to construct buildings in Ukraine. For example, in Ukraine there are the State Construction Norms, which are regulatory documents that define the requirements for designing, constructing, operating and reconstructing buildings.

2. Building regulations – local and national: In addition to the general building and construction codes, it is important to be aware of any local and national requirements that may apply to a particular area or to a particular type of construction. For example, the development and use of land may be governed by local zoning codes, regional planning documents and other regulations.

3. Permitting and regulatory processes: The construction of buildings requires various permits and regulatory processes. These may include, for example, approvals for the preparation of project documentation, approvals for the commencement of construction work, state expertise of projects, registration of land ownership, etc.

4. Labour protection: Compliance with occupational health and safety standards is particularly important in the construction industry. This includes the provision of safe working conditions for workers, the use of the necessary protective equipment, fire protection, etc.

These legal aspects are provided for general information only, and the actual requirements may vary depending on the specific circumstances and the regional characteristics. For specific and up-to-date information, it is always advisable to consult legal counsel or professionals with experience in the architecture and construction industry.

On leadership and communication skills. A modern manager must also be a team leader and a conflict manager in the context of construction projects. In our view, the ability to communicate effectively with a wide range of project

stakeholders is an important quality for a project manager. He or she must have the listening skills to understand the needs and expectations of each party, and to express his or her thoughts and ideas in a clear and convincing manner. In addition, the manager must have a willingness to be a mediator in conflicts that may arise between different parties to the project. In order to ensure the success and progress of the project, the ability to find compromise solutions, promote cooperation and resolve conflicts peacefully is essential. In particular, the diversity of the communication needs and styles of the different stakeholders in the project needs to be taken into account. Some may prefer written forms of communication (e.g. email or project documentation). Others may prefer face-to-face meetings or video conferencing. It is also important to consider the involvement of government agencies and regulators in the communication process, particularly for obtaining necessary approvals and complying with legal requirements. In addition, a leader in this field must have the ability to think strategically, analyse problems, make decisions and work under conditions of uncertainty. A true leader is a "team player" who is capable of collective interaction, an innovative manager with in-depth knowledge in various fields and who is capable of continuous learning (Lukianova et al., 2019, p. 11).

It is also common knowledge that customer focus is a prerequisite for an effective business management coordinate system. The main business effect of customer focus is the creation and maintenance of conditions for guaranteed, predictable profits through effective retention of regular customers and controlled development of relationships with new customers. Principles of customer orientation: a) attentive attitude to the customer and his needs; b) maximum respect for the customer; c) constant study of the customer's behaviour, collection and processing of information about the customer and his business environment; d) continuous improvement and enhancement of the quality of goods and services; e) open, timely, objective and fair settlement of disputes and conflicts arising in the course of cooperation; f) providing the customer with objective, reliable and complete information on the transaction; g) timely fulfilment of obligations and promises to the customer (Shyriaieva, 2016, p. 218).

Within the framework of modern methodological and methodological positions it should be noted that an effective coordinate system of business management requires a number of skills and qualities of the manager, including customer orientation, quality of communication and leadership. Customer orientation means that a manager must be focused on the needs and satisfaction of customers. They should know their customers, their requirements and expectations, and respond quickly to their needs. This involves active listening, market research and competitor analysis to provide the best solutions for customers. A key skill for a manager is good communication. They must be effective communicators. They must be able to express ideas and instructions

clearly and concisely. The ability to listen and understand others and adapt one's communication style to the needs and character of the other person is also important. Another important skill for a successful manager is how to lead and motivate. They must be able to lead and motivate their team in the achievement of their goals and objectives. A leader has to be able to influence others, to be a role model for them and to inspire them to achieve great results. Taking all these aspects into account, a leader must be an effective communicator, able to build and maintain harmonious relationships with all stakeholders.

Financial management: financial planning and budgeting, contractor contracting, cost control and risk assessment skills are required of the architect and construction manager. He or she must have an understanding of the financial aspects of the project, be able to analyse costs and profits, plan the budget and monitor the financial sustainability of the project. It is also important for an architect and construction manager to be able to draft contracts with contractors. This includes understanding the legal side of the contract, setting clear terms and conditions, protecting the company's interests and avoiding potential conflicts. The manager must also control project costs. This includes managing procurement and monitoring the costs of materials, technology and contractors' labour. It is also important to be able to assess risks and develop strategies to manage them in order to avoid negative consequences for the project.

The economic sustainability of the company is ensured by the manager's activities. In particular, there are a number of pillars:

1. Financial and organisational sustainability pillar. It includes the process of strategic decision-making and combines functions such as gathering and processing information, decision-making, management consultancy, controlling, analysing, regulating, organising and optimising the organisational structure, business planning and personnel management.

2. Functional sustainability pillar. It involves implementing strategic decisions on selling products and services, specialising the company and universalising it with a range of traditional and specific activities and services.

3. Commercial and capital sustainability pillar. It includes corporate communication, methodological support of the product range, system software, application software, functional and technological software, management of traditional risks (Hrynko et al., 2022, p. 231). As a result, the range of knowledge and skills required in the financial sector is very diverse.

It is also important to note that the decision-making process traditionally uses data from available sources, including financial statements. This data needs to be processed, systematised and analysed in order to be transformed into the required information. The main factor in this transformation is the needs of the user, such as the owner of the company, the manager, the potential investor, the creditor, etc. The difference between data and information is not in content, but

in its usefulness for decision making. From this point of view, financial accounting and reporting can be seen as a database that satisfies the needs of a large number of "information users", but at the same time cannot satisfy any of them completely. Management reporting is unique in that it is designed to meet the exclusive, pre-defined needs of a specific manager for a specific set of information. Management reporting has a dual function in a business information system. On the one hand, it models the information base on which management decisions are made. The tasks of the management accounting system are defined by formalising the requirements of the information user (management reporting). On the other hand, management reporting provides a feedback loop between the management accounting system and the users of the information. Without the use of modern information technology, the dual role of management reporting would not be possible. Management reporting can become a link between the manager and the management accounting database through the introduction of these technologies (Sopko et al., 2016, p. 5). This is a modern requirement for the professionalism of the manager of the architectural and construction industry.

Technical knowledge: the technical aspects of building materials, structures, heating, ventilation and air conditioning systems, electrical systems, etc. must be understood by the manager of the architectural and construction industry.

For example, a description of the desired knowledge in this area is provided by the analysis of possible construction and process risks. Risks in the construction and installation industry include loss of or damage to construction materials and equipment due to adverse events (e.g. natural disasters, explosions, fires, criminal acts, etc.); disruption to the operation of the facility due to design and installation errors; injuries to employees working on the construction site; illegal acts by third parties (theft, robbery, assault, etc.); errors made by contractors during installation; defects caused by the carelessness or negligence of the contractor's employees; damage caused during the transportation of items to the construction site, etc. Technological risks include: physical and moral deterioration of fixed assets; failure to achieve the technical parameters planned in the design and technological development; malfunction and breakdown of equipment and machinery; occurrence of side or delayed problems in the use of new technologies and products. We can also add the presence of defects in components, structures, machinery and equipment; low supply discipline, fuel and electricity interruptions; increase in material costs due to overspending on materials, raw materials, fuel, energy, as well as due to increase in transport, trade, overhead and other incidental costs; reduction in project prices due to its insufficient quality or negative changes in the market (Havrysh, Kuznietsova and Melnykova, 2023, p. 62–63).

An architectural and construction manager must therefore understand the technical aspects of building materials, structures, heating, ventilation and air conditioning systems, electrical systems and other important aspects of construction. This is necessary to effectively manage and coordinate work on site, and to understand how these factors affect the project and its costs. Knowledge of building regulations, health and safety, energy efficiency, standards and licensing in the construction industry is also important. Understanding the technical aspects will help the manager to better identify technical solutions, make improvements and ensure high quality design and construction.

Innovation: modern construction industry is constantly changing and the architectural and construction manager must be prepared to implement new technologies, green building standards and other innovative approaches.

Reconstructing Ukraine requires forging new relationships between local and international contractors, investors and governments, creating new opportunities and challenges for the industry. As companies invest in modern technology, machinery and construction equipment, the construction sector is characterised by a high degree of monopoly due to significant financial barriers to entry. At the same time, the understanding that innovation is a means of increasing the level of competitiveness of construction organisations leads to increased attention to innovative development, ways of activating it and increasing the efficiency of individual business processes and the company as a whole.

A modern manager must consider and exploit the following to ensure the company's innovation potential:

1. The ability to co-ordinate departments and the use of integrated computer systems, in particular integrated solutions for the automation of accounting, analysis, tax and financial reporting, have a number of advantages in the construction industry. One of the most advanced tools is Building Information Modelling (BIM). BIM helps to improve collaboration and communication between construction stakeholders. The use of BIM reduces the risk of unforeseen investment costs and speeds up the implementation of investment projects (Trach, Ryzhakova and Kryzhanovsky, 2017).

2. It is necessary to take into account the availability of new advanced construction technologies, machines and innovative materials in order to increase the efficiency of managing the innovative development of enterprises, especially in the field of construction technologies. With the introduction of new types of construction materials, including nanomaterials, recycled secondary materials and self-healing technologies, it is necessary to take into account the constant replenishment of the market of construction technologies and materials (Zgalat-Lozynska and Zgalat-Lozynsky, 2019).

3. Regarding the effectiveness of environmental measures, it is important to consider trends in creating cost effective, biosphere-friendly building projects. It is advisable to use energy-efficient, environmentally friendly and durable materials in construction projects. Care should also be taken to reduce waste and harmful effects on air, soil and water resources (Chernyshev et al., 2018).

Therefore, new technologies, green building standards and other innovative approaches should be embraced by the architectural and construction manager. As this industry is in a state of constant evolution and change, the manager must be aware of new trends and opportunities for the introduction of new technologies and innovations into the construction process. At the same time, the manager should be prepared for the introduction of green building standards, such as LEED (Leadership in Energy and Environmental Design) or BREEAM (Building Research Establishment Environmental Assessment Method) (<http://rsabc.ru/ru/o-sovete/klassifikatsiya/>). These standards aim to reduce the environmental impact of construction. The manager should be aware of green technologies, energy-efficient solutions and the use of renewable energy sources. The manager should also be prepared to implement other innovative approaches, such as using 3D modelling (Bryde et al., 2013) and virtual reality in design and construction, using Building Information Management (BIM) systems, introducing smart technologies in construction, and making effective use of data and analytics for decision making. All these skills and knowledge will help the architectural and construction Manager to be prepared to meet the challenges and introduce new technologies and innovative approaches to their work.

It is also important to bear in mind that the practical characteristics of an architectural and construction manager will vary depending on the specific sector in which he or she is working. For example, the skills and knowledge required for residential construction are different from those required for commercial or industrial projects. In the residential construction sector, for example, certain standards may be defined for residential developments, such as ergonomics, energy efficiency, and amenities for the residents. In the case of commercial property, the focus may be on the needs of the business and the fulfilment of specific customer requirements. Infrastructure or industrial projects may be concerned with safety, managing risk and environmental remediation. In particular, the introduction of resource-saving technologies in the construction process and the use of the architectural and economic concept of low-rise buildings (Yashchenko, Makatora and Kubanov, 2023) also have features in the economic activity of an architectural and construction company that require the attention of managers.

As a result of this diversity, a manager in the architectural and construction sector must have a deep understanding of the specifics of each sector. He or she must also be able to adapt his or her knowledge and skills to a particular project.

In addition, a key element of successful construction project management in a particular sector is knowledge of the laws and regulations of that sector. Consequently, managing construction projects varies from sector to sector and requires the manager to be flexible, to have a broad knowledge base and to be able to adapt to the specific conditions and requirements of the project.

Conclusions. A manager in the architectural and construction industry therefore plays a critical role in managing construction and development projects and, more generally, the activities of the organisation. This position requires a combination of theoretical knowledge of architectural and construction processes and practical project management skills.

A thorough understanding of architectural concepts, construction technologies, building codes and standards, and the fundamentals of engineering systems design are among the theoretical aspects of the manager's job. In addition, the manager will need to have an understanding of market trends, innovative technologies and modern approaches to project management in the construction industry.

The ability to manage construction processes, to plan and coordinate work, and to interact with clients, architects, engineers, contractors and workers are practical features of the manager's job. Balancing client requirements and expectations with the technical capabilities and budgetary constraints of the project, conflict resolution and management decision-making are also important. The ability to manage change and solve problems that may arise during the construction of a project is an important skill of a manager. A manager's responsibilities in the architecture and construction industry also include resource planning, budget control and ensuring that the project meets approved deadlines and requirements. It is also important to ensure workplace safety and compliance with relevant safety regulations. Developing plans and schedules, building effective teams, ensuring quality workmanship, and interacting with stakeholders during the construction process are best practices for an architecture and construction manager.

A manager in the architecture and construction industry should also focus on sustainable construction, energy efficiency and the use of environmentally friendly materials and technologies, especially in light of global challenges related to sustainability and environmental responsibility. Ukraine has significant potential for the development of the architecture and construction industry, and managers in this field have an important role to play in realising this potential. It will contribute to the sustainable and progressive development of the Ukrainian economy to ensure effective management of construction and development projects.

Prospects for further research in this area may include analysing current trends in the use of new technologies in construction and their impact on project

management, developing new methods of planning and resource management in the construction sector, studying the role of sustainable construction and green technologies in strategic management of the architecture and construction industry, the impact of digitalisation on management processes in the construction sector, researching quality and safety management systems in construction, and improving strategic management of the construction industry.

References:

Karpov, V. V. et al. (2021). *Arkhitektura, budivnytstvo, dyzain v osvithnomu prostori: kolektyvna monohrafiia* [Architecture, construction, design in educational space: a collective monograph]. According to the editors d-r ist. nauk V. V. Karpov. Ryha, Latviia: Baltija Publishing. 604 p. [in Ukrainian].

Velihotska, Yu. S. (2017). *Suchasni metody optymizatsii pryiniattia arkhitekturnykh rishen budivel* [Modern methods of optimization of architectural decisions of buildings]. *Suchasni problemy arkhitektury ta mistobuduvannia = Modern problems of architecture and urban planning*, № 47, P. 435–444 [in Ukrainian].

Pasko, O. M., Kravchenko, M. S. (2023). *Vazhlyvist upravlinskykh znan dlia studentiv dyzainerskykh spetsialnostei* [The importance of management knowledge for design students]. *Innovatsiina pedahohika = Innovative pedagogy*, № 61(1), P. 81–84 [in Ukrainian].

Danchenko, O. B., Zanora, V. O. (2019). *Proektnyi menedzhment: upravlinnia ryzykamy ta zminamy v protsesakh pryiniattia upravlinskykh rishen: monohrafiia* [Project management: management of risks and changes in management decision-making processes: monograph]. Cherkasy: PP Chabanenko Yu.A. 278 p. [in Ukrainian].

Dunda, S., Rybachuk-Iarova, T., Tiukha, I. (2022). *Taim-menedzhment yak napriam pidvyshchennia efektyvnosti operatsiinoi stratehii pidpriemstva* [Time management as a direction of increasing the efficiency of the company's operational strategy]. *Ekonomika ta suspilstvo = Economy and society*, № 42. URL: <https://economyandsociety.in.ua/index.php/journal/article/view/1670/1607> [in Ukrainian].

Kurashova, I. M. (2021). *Hospodarsko-pravovyi mekhanizm samorehuliuвання budivelnnoi haluzi v Ukraini: monohrafiia* [Economic and legal mechanism of self-regulation of the construction industry in Ukraine: monograph]. Kharkiv: Pravo. 176 p. [in Ukrainian].

Savchyn M. et al. (2020). *Pravove rehuliuвання ta ekonomichni svobody i prava: monohrafiia* [Legal regulation and economic freedoms and rights: monograph]. According to the editors prof. Mykhail Savchyn. Uzhhorod: Publishing House "RIK-U". 224 p. [in Ukrainian].

Marchenko, O. V., Sushko, D. O. (2018). *Metodychni rekomendatsii shchodo uchasti u hrantovykh prohramakh ta konkursakh* [Methodological recommendations for participation in grant programs and competitions]. Dnipro: DDUVS. 68 p. [in Ukrainian].

Lukianova, L. B., Androshchuk, I. M., Banit, O. V. (2019). *Teoretychni i praktychni aspekty rozvytku liderskykh yakostei u top-menedzheriv u vitchyzniani nautsi y praktytsi* [Theoretical and practical aspects of the development of leadership qualities of top managers in domestic science and practice]. *Visnyk pisliadyplomnoi osvity. Serii: Pedahohichni nauky = Herald of postgraduate education. Series: Pedagogical sciences*, № 8, P. 89–108 [in Ukrainian].

Shyriaieva, N. Yu. (2016). *Yakist marketynhovoho menedzhmentu budivelnnykh orhanizatsii* [Quality of marketing management of construction organizations]. *Infrastruktura rynku = Market infrastructure*, № 2, P. 218–220 [in Ukrainian].

Maksymenko, O. L. et al. (2019). Zabezpechennia bezpechnosti ta yakosti zhytlovo-komunalnykh posluh cherez formuvannia systemy pidhotovky ta profesiinoi atestatsii menedzheriv (upravyteliv) zhytlovoho-budynku (hrupy budynkiv): kolektyvna monohrafiia [Ensuring the safety and quality of housing and communal services through the formation of a system of training and professional certification of managers (managers) of residential buildings (groups of buildings): collective monograph]. According to the editors O. L. Maksymenko. Kyiv: Publishing House LLC "VISTKA". 32 p. [in Ukrainian].

Hrynko, T. et al. (2022). Orhanizatsiino-ekonomichni aspekty rozvytku pidpriemnytskykh struktur v Ukraini ta sviti: monohr. [Organizational and economic aspects of the development of business structures in Ukraine and the world: monograph]. According to the editors Dr. Econ. Sciences, Prof. T. Hrynko. Dnipro: Publisher Bila K. O. 400 p. [in Ukrainian].

Sopko, V. V., Benko, M. M., Honcharenko, O. M. et al. (2016). Dystsyplinarna matrytsia upravlinskoi zvitnosti: monohrafiia [Disciplinary matrix of management reporting: monograph]. According to the editors V. V. Sopko. Kyiv: Kyiv. nats. torh.-ekon. un-t. 456 p. [in Ukrainian].

Havrysh, O. A., Kuznietsova, K. O., Melnykova, V. A. (2023). Ryzyk-menedzhment budivelnnykh pidpriemstv proektooriientovanoho typu: monohrafiia [Risk management of project-oriented construction enterprises: monograph]. According to the editors N. M. Lysetska. Kyiv: KPI im. Ihoria Sikorskoho. 211 p. [in Ukrainian].

Trach, R. V., Ryzhakova, H. M., Kryzhanovskiy, V. I. (2017). Informatsiine modeliuвання ta kontseptsiiia intehrovanoi realizatsii budivelnnykh proektiv yak osnova innovatsiinoho rozvytku budivelnoho pidpriemstva [Information modeling and the concept of integrated implementation of construction projects as a basis for innovative development of a construction enterprise]. *Upravlinnia rozvytkom skladnykh system: zb. nauk. prats. = Management of the development of complex systems: a collection of scientific papers*. Kyiv National University of Construction and Architecture, № 31, P. 173–178 [in Ukrainian].

Zghalat-Lozynska, L. O., Zghalat-Lozynskiy, O. B. (2019). Aktyvizatsiia vykorystannia nanomaterialiv ta nanotekhnolohii yak napriam innovatsiinoi diialnosti u budivnytstvi [Activation of the use of nanomaterials and nanotechnologies as a direction of innovative activity in construction]. *Budivelne vyrobnytstvo = Construction production*, № 68, P. 30–38 [in Ukrainian].

Chernyshev, D. O., Zaiats, Ye. I., Kovalov, V. V. (2018). Vymohy do instrumentarii orhanizatsiino-tekhnologichnoho suprovodu proektiv biosferosumisnoho budivnytstva [Requirements for the toolkit of organizational and technological support of biosphere-compatible construction projects]. *Visnyk Prydniprovskoi derzhavnoi akademii budivnytstva ta arkhitektury = Bulletin of the Dnipro State Academy of Construction and Architecture*, № 4, P. 47–54 [in Ukrainian].

Klassifikatsiya organizatsiy v sfere ekoustoychivogo stroitel'stva [Classification of organizations in the field of sustainable construction]. *SE "Promotion of Sustainable Development of Architecture and Construction – Green Building Council"*. URL: <http://rsabc.ru/ru/o-sovete/klassifikatsiya/> [in Russian].

Bryde, D., Broquetas, M., Volm, J. M. (2013). The project benefits of Building Information Modelling (BIM). *International Journal of Project Management*, Vol. 31, № 7, P. 971–980.

Yashchenko, O., Makatora, D., Kubanov, R. (2023). Architectural and economic approach to love-rise housing to achieve economic stability and sustainable development. *Ekonomika ta suspilstvo = Economy and society*, № 58, DOI: <https://doi.org/10.32782/2524->

0072/2023-58-11. URL: <https://economyandsociety.in.ua/index.php/journal/article/view/3264/3187/>

AUTHOR (S) BIOSKETCHES



Makatora Dmytro, Candidate of Engineering Sciences, Associate Professor, Department of Printing Machines and Automated Complexes, Publishing and Printing Institute, National Technical University of Ukraine "Igor Sikorsky Kyiv Polytechnic Institute", Ukraine

<https://orcid.org/0000-0002-1909-900X>

Scopus Author ID: 58572089000

Researcher ID: AHB-4079-2022

E-mail: makatora_d@ukr.net



Yashchenko Oleksii, Candidate of Architecture, Associate Professor, Head of Department, Department of Innovative Architecture And Design, Separate structural subdivision "Institute of Innovative Education of the Kyiv National University of Civil Engineering and Architecture", Ukraine

<https://orcid.org/0000-0001-6181-6597>

E-mail: yaschenko_af@ukr.net



Kubanov Ruslan, Candidate of Pedagogical Sciences, Associate Professor, Associate Professor the Department of Economics, Management and Territorial Management, Separate structural subdivision "Institute of Innovative Education of the Kyiv National University of Civil Engineering and Architecture", Ukraine

<https://orcid.org/0000-0002-0121-4858>

Researcher ID: L-6715-2018

kubanov12@gmail.com

COPYRIGHTS

©2023 The author(s). This is an open access article distributed under the terms of the Creative Commons Attribution (CC BY 4.0), which permits unrestricted use, distribution, and reproduction in any medium, as long as the original authors and source are cited. No permission is required from the authors or the publishers.

HOW TO CITE THIS ARTICLE

Makatora, D., Yashchenko, O., Kubanov, R. (2023). Features preparation of the project manager in the architecture and construction industry. *Management*, 2(38): 133–150. <https://doi.org/10.30857/2415-3206.2023.2.11>.

JEL Classification:
G15; G21

UDC 339.72:330.354

DOI: 10.30857/2415-
3206.2023.2.12

DIDGITALIZATION AND INTERNATIONAL ACCESS TO FINANCE

Volodymyr SHEVCHENKO¹

¹ *Taras Shevchenko National University of Kyiv,
Ukraine.*

INTRODUCTION. The rapid development of information technologies in recent years has resulted in the digitalization of the economy and society. This transformation has led to the emergence of the digital economy, which is characterized by the production of goods and services derived primarily from digital technologies. This shift towards digitalization has had a significant impact on various aspects of the economy, including access to finance, small business development, and innovation. In particular, the banking sector has undergone significant changes as traditional financial institutions embrace digital technologies to better serve their customers.

HYPOTHESIS. The hypothesis of this scientific research revolves around the impact of digitalization on the banking sector in Ukraine. Specifically, the study aims to explore how the adoption of digital technologies, such as P2P lending, has influenced the financing of small and medium enterprises (SMEs), innovation, and information startups. The research will also investigate the role of digitalization, big data, and artificial intelligence in improving decision-making processes and reducing risks in the banking sector.

OBJEKTIV OF THE RESEARCH. Purpose of this study is to examine the transformation of the banking sector in Ukraine in response to global economic and financial trends. By analyzing the adoption of digital technologies, such as P2P lending, the research aims to provide insights into how these innovations have contributed to the financing of SMEs, innovation, and information startups. Additionally, the study seeks to identify the challenges and opportunities associated with

digitalization in the banking sector and offer recommendations for future development.

METHODOLOGY OF SCIENTIFIC RESEARCH. The methodology of this scientific research will involve a comprehensive literature review to explore the existing literature on digitalization, P2P lending, and the banking sector in Ukraine. The study will also utilize quantitative data analysis to examine the impact of digital technologies on financing SMEs and startups. Additionally, interviews with key stakeholders in the banking sector will be conducted to gain insights into their experiences with digitalization and P2P lending.

CONCLUSIONS AND PROSPECTS FOR FURTHER RESEARCH. In conclusion, the digitalization of the economy and society has led to significant changes in the banking sector in Ukraine. The adoption of technologies like P2P lending has enabled greater access to finance for SMEs, startups, and innovative projects. Moving forward, it is essential for banks to continue embracing digitalization, big data, and artificial intelligence to improve decision-making processes and reduce risks. Future research could focus on exploring the long-term impact of digital technologies on the banking sector in Ukraine and identifying strategies for sustainable growth and development. Additionally, studying the role of digitalization in promoting financial inclusion and social cohesion could provide valuable insights for policymakers and financial institutions.

KEYWORDS: digitalization; innovation; transformation; banking; financial services; information technologies; internet banking; financial institutions.

NUMBER OF REFERENCES	NUMBER OF FIGURES	NUMBER OF TABLES
7	0	0

JEL Classification:
G15; G21

УДК 339.72:330.354

DOI: 10.30857/2415-
3206.2023.2.12

ДИДЖІТАЛІЗАЦІЯ ТА МІЖНАРОДНИЙ ДОСТУП ДО ФІНАНСІВ

Володимир ШЕВЧЕНКО¹

¹ Київський національний університет імені Тараса
Шевченка, Україна

ВСТУП. Швидкий розвиток інформаційних технологій у останні роки призвів до цифровізації економіки і суспільства. Ця трансформація призвела до появи цифрової економіки, яка характеризується виробництвом товарів і послуг, отриманих переважно з цифрових технологій. Цей зсув у напрямку цифровізації мав значний вплив на різні аспекти економіки, включаючи доступ до фінансів, розвиток малих підприємств та інновації. Зокрема, банківський сектор пройшов значні зміни, оскільки традиційні фінансові установи впроваджують цифрові технології для кращого обслуговування своїх клієнтів.

ГІПОТЕЗА. Гіпотеза цього наукового дослідження обертається навколо впливу цифровізації на банківський сектор в Україні. Конкретно, дослідження має на меті дослідити, як впровадження цифрових технологій, таких як Р2Р позики, впливало на фінансування малих і середніх підприємств (МСП), інновації та інформаційні стартапи. Дослідження також дослідить роль цифровізації, великих даних та штучного інтелекту у покращенні процесів ухвалення рішень та зниженні ризиків у банківському секторі.

МЕТА ДОСЛІДЖЕННЯ. Метою цього дослідження є вивчення трансформації банківського сектора в Україні у відповідь на глобальні економічні та фінансові тенденції. Аналізуючи впровадження цифрових технологій, таких як Р2Р позики, дослідження спрямовано на те, щоб надати уявлення про те, як ці інновації сприяють фінансуванню МСП, інноваціям та інформаційним стартапам. Крім того, дослідження спрямоване на виявлення викликів та можливостей, пов'язаних з цифровізацією в банківському секторі, і надання рекомендацій для майбутнього розвитку.

МЕТОДОЛОГІЯ НАУКОВОГО ДОСЛІДЖЕННЯ.

Методологія цього наукового дослідження буде включати комплексний огляд літератури для вивчення наявної літератури з цифровізації, Р2Р позик і банківського сектора в Україні. Дослідження також буде використовувати кількісний аналіз даних для вивчення впливу цифрових технологій на фінансування МСП та стартапів. Крім цього, будуть проведені інтерв'ю з ключовими зацікавленими особами в банківському секторі для отримання уявлень про їх досвід з цифровізацією та Р2Р позиками.

ВИСНОВКИ ТА ПЕРСПЕКТИВИ ПОДАЛЬШИХ ДОСЛІДЖЕНЬ.

У висновку можна сказати, що цифровізація економіки та суспільства призвела до значних змін у банківському секторі в Україні. Впровадження таких технологій, як Р2Р позики, дало можливість отримати більший доступ до фінансів для МСП, стартапів та інноваційних проєктів. На майбутнє важливо, щоб банки продовжували впроваджувати цифровізацію, великі дані та штучний інтелект для покращення процесів ухвалення рішень та зменшення ризиків. Майбутні дослідження можуть бути спрямовані на дослідження довгострокового впливу цифрових технологій на банківський сектор в Україні та визначення стратегій для сталого зростання та розвитку. Крім того, вивчення ролі цифровізації у сприянні фінансовій інклюзії та соціальній єдності може надати цінні відомості для політиків та фінансових установ.

КЛЮЧОВІ СЛОВА: цифровізація; інновації; трансформація; банківський сектор; фінансові послуги; інформаційні технології; інтернет-банкінг; фінансові установи.

Presentation of the main material. Information technologies development is being recently transforming into digitalization of the economy and society.

The interaction between innovation, small business development, and start-up growth is playing an increasingly crucial role in our society. These processes are not only driving economic growth, but also impacting social aspects such as employment, intellectualization, and the dissemination of new ideas and technologies. The rapid advancement of information and digital technologies has further fueled this trend, providing a significant boost to the overall process.

While traditional financial institutions like commercial banks have typically focused on serving corporate clients and engaging in financial markets, there has been a noticeable shift in recent years. These institutions are now diversifying their product offerings and embracing new technologies to better manage risks and personalize their services for clients.

Access to finance is becoming increasingly vital in our modern economy, as it plays a key role in supporting small businesses, entrepreneurs, households, and individuals across all socio-economic backgrounds. This concept, often referred to as 'Financial Inclusion', emphasizes the importance of ensuring that banking and financial services are accessible and available to all members of society. By doing so, we can better integrate diverse economic and social activities, ensuring that everyone is able to participate in and benefit from economic and financial development on both local and global scales.

The World Bank has identified access to finance as a key priority in efforts to combat poverty, recognizing its potential to unlock creative potential, reduce poverty, and foster social cohesion. By addressing the issue of financial inclusion, we are not only addressing economic disparities but also promoting social equality and empowerment.

Overall, the role of innovation, small business development, and start-up growth in conjunction with improved access to finance is shaping the landscape of our economy and society. As we continue to harness the power of new technologies and financial mechanisms, we have the opportunity to create a more inclusive and prosperous future for all individuals and communities. Ultimately, it is through these interconnected processes that we can drive sustainable economic growth, foster innovation, and promote social well-being on a global scale.

The global economic and financial trends are influencing on the transformations of banking in order to achieve sustainability. The major modern changes are:

- broader access to banking and financial services for economic and social inclusion;
- more social orientation of banking, better transparency, providing special services for selected social groups (women, young, senior citizen etc.);

- disintermediation as direct financial services providing to customers such as P2P financing, crowdfunding;

- digitalization and "fintech", which provide direct financial services based on the information and digital technologies.

The main factors driving the spread of digitalization, Internet banking, and mobile banking are multifaceted and dynamic. Technological innovations have played a key role in improving the information and digital possibilities of direct access to banking services. The distribution of free or cheap Internet access in developed countries has facilitated the shift of users from mobile phones to smartphones with more advanced features. This has resulted in significant cost savings and reduced capital expenditures for banks, leading to a decrease in the number of physical bank branches. At the same time, consumers have benefited from the convenience of anytime access, expanded services, ease of use, and enhanced security provided by digital banking platforms.

Social and cultural factors also play a significant role in the adoption of digital banking services. Individual preferences, customs, and attitudes towards technology influence the uptake of internet and mobile banking. Regional differences in Europe further highlight the influence of social and cultural factors on banking behavior. For example, the high level of internet banking usage in the Nordic countries can be attributed to issues of physical access to banks in remote areas, as well as high levels of general and financial literacy among the population. The easy availability of internet access in these countries has also contributed to the popularity of online banking services.

On the other hand, countries like Italy, Cyprus, and Greece have relatively high levels of internet penetration but lower adoption rates of internet banking services. This discrepancy suggests that factors beyond technological infrastructure, such as cultural norms and preferences, play a significant role in shaping consumer behavior. In countries with lower internet penetration rates, such as Ukraine, the use of digital financial services is further hindered, underscoring the importance of addressing infrastructural challenges to promote financial inclusion. Overall, the spread of digitalization, internet banking, and mobile banking is driven by a combination of technological advancements, cost savings, consumer benefits, and social and cultural factors. As the digital economy continues to evolve, it is essential for policymakers, financial institutions, and other stakeholders to address barriers to adoption and promote the benefits of digital financial services. By harnessing the power of technology and understanding the diverse needs and preferences of consumers, countries can accelerate the transition towards a more inclusive and efficient digital banking ecosystem.

Development of information technologies and the Internet have enabled the formation of such a way to access to funding as crowdfunding or

crowdsourcing. This method operates on the basis of placing an electronic request to a special Internet platform for financing a specific project, which is usually socially important. According to each request, placed on a platform over the Internet formed a pool of private investors, from which platform provides funding for a particular user.

Crowdfunding is solidarity (pool of individuals and institutions) and an alternative to traditional forms of financing – bank loans, placement of shares and bonds, leasing and others.

There are four main types of crowdfunding combined into two groups:

1) credit-based (lending-based) and equity-based (equity-based) – are taking into account the financial aspects of projects and provide adequate concessional lending and equity participation in a potential borrower. This mainly involved the financing for information, high-tech products and services.

2) grant-based (donation-based) and reward-based (reward-based) – to finance mainly social-oriented projects, provide appropriate subsidies (donations) and some often non-economic compensation, depending on personal predisposition of individuals to social activities and charity.

The most widespread has become credit-based crowdfunding based on technology P2P (person-to-person). This technology is mainly used by crowdfunding platforms as well as by commercial banks. According to this technology private investors form a pool of lending for specific project. For investors such participation in a pool is a definite replacement of traditional deposit, often at more favorable terms, when interest on the loan is tied to the expected profitability of the project. For banks, this technology makes it possible to enhance the interest of private borrowers (investors) and to extend the financing of innovation, small and medium businesses.

In Ukraine, P2P technology has been successfully used by "Privatbank" since 2015 and plays an important role in changing strategies associated with corporate loans to finance SMEs, innovation and information startups.

Digitalization, including big data and artificial intelligence, could improve quality of banking decisions and reduce risks. For example, Ukraine banking system remains fragile mainly due to the high level of non-performing loans (NPL) have been accounted at 51% of all loans value in 2018 (National Bank of Ukraine, 2018, p. 7).

Banking development and transformation in Ukraine more relied on the global economic and financial factors: better access to international financial markets, wider implementation of information and financial technologies.

Conclusion. The emergence of the digital economy has led to a greater focus on innovation, small business development, and financial inclusion. The shift towards sustainability in banking is driven by the need for broader access to financial services and the adoption of digital technologies. In Ukraine, the

implementation of technologies like P2P lending has played a crucial role in financing SMEs, innovation, and information startups. As the banking sector continues to evolve, it is important for institutions to embrace digitalization, big data, and artificial intelligence to improve decision-making processes and reduce risks. By leveraging these technologies and embracing global economic and financial trends, the banking sector in Ukraine can achieve greater stability and growth in the future.

REFERENCES:

- Bukht, R., Heeks, R. (2017). Conceptualising and Measuring the Digital Economy. The University of Manchester. URL: https://www.researchgate.net/publication/327356904_Defining_Conceptualising_and_Measuring_the_Digital_Economy.
- National Bank of Ukraine (2018). Ogljad bankivskogo sectoru. Serpen 2018 [Overview of the banking sector. August 2018]. Kyiv, Ukraine: National Bank of Ukraine [In Ukrainian].
- UNCTAD (2017). Information Economy Report 2017: Digitalization, Trade and Development. Geneva: United Nations Conference on Trade and Development. URL: https://unctad.org/en/PublicationsLibrary/ier2017_en.pdf.
- Accentur. (2017). Growing the Digital Economy. Dublin: Accenture. URL: <https://www.accenture.com/gb-en/insight-digital-disruption-growth-multiplier>.
- British Computer Society (2014). The Digital Economy. London: British Computer Society.
- Brennen, S., Kreiss, D. (2014). Digitalization and digitization. In Culture Digitally. September 8. URL: <http://culturedigitally.org/2014/09/digitalization-and-digitization/>
- Dean, D. et al. (2012). The Internet Economy in the G-20. Boston, MA: Boston Consulting Group. URL: <https://www.bcg.com/documents/file100409.pdf>.

AUTHOR (S) BIOSKETCHES



Shevchenko Volodymyr, Candidate of Economic Sciences, Associate Professor, Department of International Economics and Marketing, Taras Shevchenko National University of Kyiv, Ukraine.

<https://orcid.org/0000-0002-5206-6971>
Email: svberez2001@gmail.com

COPYRIGHTS

©2023 The author(s). This is an open access article distributed under the terms of the Creative Commons Attribution (CC BY 4.0), which permits unrestricted use, distribution, and reproduction in any medium, as long as the original authors and source are cited. No permission is required from the authors or the publishers.

HOW TO CITE THIS ARTICLE

Shevchenko, V. (2023). Didgitalization and international access to finance. *Management*, 2(38): 151–156. <https://doi.org/10.30857/2415-3206.2023.2.12>.

JEL Classification:
F36, L26

UDC 658.1:004.8

DOI: 10.30857/2415-
3206.2023.2.13

FOREIGN EXPERIENCE OF MANAGING THE DEVELOPMENT OF ENTREPRENEURSHIP USING ARTIFICIAL INTELLIGENCE

Liudmyla HANUSHCHAK-YEFIMENKO¹,
Vadym HRYTSUN¹

¹Kyiv National University of Technologies and
Design, Kyiv, Ukraine

Introduction. There is a process of forming a conceptual approach to understanding artificial intelligence and regulatory regulation strategies in the world. Having analyzed the theoretical approaches to the definition of the concept of artificial intelligence, we come to the conclusion that a common approach to the definition of artificial intelligence (hereinafter AI) has not been formed in scientific circles and within the framework of international organizations.

Currently, in the vast majority of cases, AI technologies are created by humans and in one way or another interact with humans, however, in the process of legal regulation of relations with AI, it should be taken into account that artificial intelligence is gaining more and more autonomy due to the improvement of technologies.

The hypothesis of the scientific research consists in the substantiation of foreign experience and the formation of proposals for managing the development of entrepreneurship using artificial intelligence.

The purpose of the study is to substantiate the peculiarities of the adaptation of foreign experience in managing the development of entrepreneurship with the use of artificial intelligence.

The methodology of scientific research is general scientific methods of research: logical and comparative analysis in revealing the principles of managing the development of entrepreneurship using artificial intelligence; the induction method for making formal and logical generalizations, the deduction method was used to obtain intermediate (partial) conclusions based on the analysis of the nature of the general process, the abstraction method for identifying and identifying significant trends in managing the development of entrepreneurship using artificial intelligence.

Conclusions and prospects for further research. Artificial intelligence has become an integral part of many spheres of social life, and law in its broadest sense has not become an exception, because artificial intelligence technologies have in one way or another touched various branches of law since the beginning of scientific research on this issue, which takes its own beginning as early as the 70s of the 20th century, until today they have transformed from the modeling of legal norms to contracts written in the form of computer programs, virtual legal consultants, predictive justice technologies and other similar technologies. However, the perception of law as a system of value orientations can become an extremely difficult task for AI, therefore, when forming the legal basis of human-AI interaction, it is worth considering the difficulty for AI systems to work with abstract categories.

The formation of the foundations of the international legal regulation of AI takes place within universal and regional organizations. For example, the Center for Artificial Intelligence and Robotics was founded within the UN, UNESCO adopted the Recommendation on the Ethics of Artificial Intelligence, the OECD – relevant principles, UNCITRAL and UNIDROIT are studying the issues of integrating AI into private-law relations. Formation of technical standards, principles of responsible handling of these technologies and ethical standards also takes place within the framework of the ITU, the EU and other international organizations.

Keywords: integration; management; development; entrepreneurship; artificial intelligence; differentiation; scaling.

NUMBER OF REFERENCES	NUMBER OF FIGURES	NUMBER OF TABLES
20	0	0

JEL Classification:
F36, L26

УДК 658.1:004.8

DOI: 10.30857/2415-
3206.2023.2.13

ЗАРУБІЖНИЙ ДОСВІД УПРАВЛІННЯ РОЗВИТКОМ ПІДПРИЄМНИЦТВА З ВИКОРИСТАННЯМ ШТУЧНОГО ІНТЕЛЕКТУ

Людмила ГАНУЩАК-ЄФІМЕНКО¹,
Вадим ГРИЦУН¹

¹ Київський національний університет технологій та
дизайну, Київ, Україна

Вступ. У світі відбувається процес формування концептуального підходу до розуміння штучного інтелекту та стратегій нормативного врегулювання. Проаналізувавши теоретичні підходи до визначення поняття штучний інтелект, приходимо до висновку, що у наукових колах та в рамках міжнародних організацій не сформовано спільного підходу до визначення штучного інтелекту (далі ШІ).

Наразі технології ШІ в переважній більшості випадків створені людиною та так чи інакше взаємодіють з людиною, проте в процесі правової регламентації взаємовідносин зі ШІ варто врахувати, що штучний інтелект набуває все більше автономності в силу удосконалення технологій.

Гіпотеза наукового дослідження полягає у обґрунтуванні зарубіжного досвіду та формуванні пропозицій щодо управління розвитком підприємництва з використанням штучного інтелекту.

Метою дослідження є обґрунтування особливостей адаптації зарубіжного досвіду управління розвитком підприємництва з використанням штучного інтелекту.

Методологією наукового дослідження є загальнонаукові методи дослідження: логічного та порівняльного аналізу у розкритті засад управління розвитком підприємництва з використанням штучного інтелекту; метод індукції для здійснення формально-логічних узагальнень, метод дедукції використовувався для одержання проміжних (часткових) висновків на основі аналізу характеру загального процесу, метод абстрагування для виявлення та ідентифікації значимих тенденцій управління розвитком підприємництва з використанням штучного інтелекту.

Висновки та перспективи подальших досліджень. Штучний інтелект став невід'ємною частиною багатьох сфер суспільного життя, й право в найширшому його розумінні не стало винятком, адже технології штучного інтелекту так чи інакше торкнулись різних галузей права і з моменту початку наукових досліджень цієї проблематики, що беруть свій початок ще з 70-х років ХХ сторіччя, до сьогодні трансформувались від моделювання правових норм до договорів, написаних у вигляді комп'ютерних програм, віртуальних юридичних консультантів, технологій прогностичного правосуддя та інших схожих технологій. Проте, сприйняття права як системи ціннісних орієнтирів, може стати надскладним завданням для ШІ, тому при формуванні правового підґрунтя взаємодії людини та ШІ, варто враховувати складність для систем ШІ працювати із абстрактними категоріями.

Формування засад міжнародно-правового регулювання ШІ відбувається в межах універсальних та регіональних організацій. Так, в рамках ООН засновано Центр штучного інтелекту та робототехніки, ЮНЕСКО ухвалила Рекомендацію щодо етики штучного інтелекту, ОЕСР – відповідні принципи, ЮНСІТРАЛ та УНІДРУА вивчають проблематику інтеграції ШІ в приватно-правові відносини. Формування технічних стандартів, принципів відповідального поведіння з цими технологіями та етичних стандартів відбувається також в рамках МСЕ, ЄС та інших міжнародних організацій.

Ключові слова: інтеграція; управління; розвиток; підприємництво; штучний інтелект; диференціація; масштабування.

Problem statement. Considering the scope and diversity of the fields of application of artificial intelligence, as well as the challenges and potential threats that these technologies can provoke, it is quite natural that the world community has identified the use of artificial intelligence for the purpose of creating "digital public goods" as one of its priorities. The United Nations High Level Group on Digital Cooperation will be key to achieving the Sustainable Development Goals. At the same time, under digital public goods, experts understand open AI models that will function in accordance with the norms of international treaties, national laws, standards in the field of privacy and best practices for the protection of human rights in general.

Analysis of recent research on the problem The world community has come to realize the need to form the foundations of international legal regulation of artificial intelligence at both the universal and regional levels. Currently, there are more than 160 normative documents in the world, developed within the framework of various international organizations, individual states or private companies, but all of them, in the vast majority, relate to the ethical principles of using AI. The UN Secretary General emphasized the need to create a universal platform to combine efforts in this direction, because the world community lacks joint coordination on this issue, in addition, there is an alarming trend of limited participation in the dialogue of developing states.

As for initiatives within the UN, in 2017 the Center for Artificial Intelligence and Robotics was established in The Hague, which operates within the framework of the UN Interregional Research Institute on Crime and Justice, the main areas of which are: research on ways to combat the criminal use of AI, including terrorists; application of AI in law enforcement activities; strengthening cyber security through the use of AI technologies; analysis of the advantages of using AI in administrative and criminal justice; ethical issues of using AI; human rights and artificial intelligence and a number of others (United Nations, 2022).

The purpose of the study there is research and adaptation of foreign experience in managing the development of entrepreneurship using artificial intelligence.

Presentation of the main material In November 2021, member states of the United Nations Educational, Scientific and Cultural Organization adopted the already mentioned Recommendation on the Ethics of Artificial Intelligence, which became the first universal document on the ethics of the use of AI, created with the aim of forming a universal platform of values, principles and standards, which can be used by individual states in the process of developing their own legislation on AI issues in accordance with international law⁸. The authors of the document include the list of such values: respect, protection and promotion of human rights, basic freedoms and human dignity; environmental

and ecosystem prosperity; ensuring diversity and inclusion; life in a society built on the principles of peace, justice and relationships. In turn, the principles included the following: proportionality and non-injury; ensuring security and protection; fairness and non-discrimination; sustainable development; ensuring the right to privacy and protection of personal data; human control, public oversight and accountability; transparency and comprehensibility; responsibility and reporting; awareness and literacy, as well as the principle of multilateral and adaptive management and cooperation.

Since artificial intelligence technologies are actively used in international trade, the UN Commission on International Trade Law (hereinafter – UNCITRAL) has not remained aloof from modern trends and has become a forum that, among other issues, actively investigates the impact of AI technologies on international trade, in particular the issue of automated conclusion of contracts .

Within the framework of UNCITRAL, a separate working group has been created to study the topics of using artificial intelligence during negotiations, conclusion and execution of contracts; analysis of the provisions of existing UNCITRAL texts applicable to the automated conclusion of contracts in the context of the possibility of their application and to contracts concluded with the participation of AI; the development of new standard provisions that would allow solving a number of legal problems related to the automated conclusion of contracts; development of principles regarding legal issues related to the automated conclusion of contracts. Within the framework of UNCITRAL, there was even a proposal to develop a legislative provision on automated contract conclusion and AI. It is quite possible that such an initiative will be implemented in the near future.

The UNCITRAL working group did not formulate its own definition of the concept of AI, but noted with reference to John McCarthy that the term "artificial intelligence" is used in two meanings – "as the ability of machines to detect or simulate human intellectual behavior and as the branch of computer science that studies this ability". Also, the UNCITRAL working group emphasized that the definition of AI systems proposed by the High-Level Expert Group on Artificial Intelligence, created within the framework of the European Commission, correlates in its content with the understanding of automated systems that appear in some texts of UNCITRAL and the International Institute for Unification of private law (hereinafter – UNIDRUA). What is interesting is UNCITRAL's approach to the impracticality of not only the formulation of the definition of artificial intelligence, which may violate the principle of technological neutrality, but also the attempt to formulate a list of used methods of programming AI systems in view of the speed of their improvement and change. Thus, UNCITRAL proposes to consider the unpredictability of such

systems as the main distinguishing feature of artificial intelligence and accordingly to form and, if possible, improve the legal framework (United Nations, 2022).

As for UNIDRUA, representatives of the institute take an active part in the study of legal issues related to the use of AI, smart contracts and other new technologies. In addition to the fact that UNIDRUA has included work on issues related to digital technologies and private law to its agenda, the institute also actively cooperates with UNCITRAL on these issues.

The International Telecommunication Union is also actively engaged in the study of artificial intelligence issues, but its activities in the vast majority of cases are aimed at developing artificial intelligence standards specifically in the field of information technologies. ICE assumes that the development of AI cannot be separated from the improvement of its three main elements, namely: data, algorithms and computing power. In addition, ICE has become a platform for stakeholders to promote a common understanding of the capabilities of AI technologies in such areas as: health care, information and communication technologies, environmental protection, autonomous control and management of devices, disaster risk management and other areas where artificial intelligence can be used for development. Thus, the work of the ITU in the field of artificial intelligence is mostly focused on the technical component of this technology and rather on ensuring fair access to its benefits than on legal regulation.

The World Trade Organization has repeatedly expressed interest in the use of the latest technologies, including artificial intelligence, with the aim of simplifying trade procedures, in particular, its use in the work of customs authorities. Thus, the World Trade Organization, together with the World Customs Organization, published a study on the role of the latest technologies in cross-border trade from the point of view of customs affairs, which analyzed how exactly the benefits of AI can be used to improve the efficiency of customs control and customs clearance processes. For example, AI can be used to interpret scanner images; chatbots working with the involvement of artificial intelligence technologies can be used to ensure fast communication on the Internet, and robots - to answer people's questions at checkpoints; also, AI can be involved in conducting market price analytics and filtering research results.

Currently, within the framework of the WTO, there is no document that would in any way regulate the use of AI in international trade, only the study of the prospects for use and the analysis of potential benefits and risks. At the same time, the advantages of the WTO include: improving the quality of data, increasing the transparency of procedures and improving risk management, and the challenges include: ensuring the confidentiality of data processed in general and the protection of personal data, ethical issues of using AI technologies,

ensuring the safety and continuity of AI work in particular in the conditions cyber attack and others.

It is important to emphasize that studies and surveys conducted within the framework of the WTO testify to the high level of interest of countries in the implementation of the latest technologies in the work of state bodies, and customs in particular. Taking into account that the conducted research will be used by the governments of various states in the future to form their own policies in this area, the WTO draws special attention to the need for proper legal regulation of the use of AI in order to minimize the risks of such use.

In 2019, the Organization for Economic Co-operation and Development approved the OECD Council Recommendation on Artificial Intelligence, in which it formulated its understanding of the AI system and the principles of responsible management of reliable AI. According to the definition of the organization itself, this document is "the first intergovernmental standard on artificial intelligence". The OECD identified the following five principles, which, according to the Recommendation, should be considered as a whole, as they are complementary: 1) promotion of inclusive growth, sustainable development and well-being, which involves the responsible use of AI technologies with the aim of expanding human capabilities, involving all population groups, reducing inequalities among people, including economic, gender and others, as well as environmental protection; 2) provision of value guidelines aimed at people and justice, including respect for the principle of the rule of law, human rights and freedoms, and democratic values; 3) compliance with transparency and comprehensibility in the use of AI systems, which should be aimed at unifying the understanding of such systems, at responsible disclosure of information about AI systems and their integration into various spheres of human life, ensuring understanding of the results of the work of these systems and the possibility of contesting the results of the work of AI systems in case of damage caused by them; 4) ensuring the reliability and safety of the use of AI systems throughout their life cycle in order to manage and eliminate risks if necessary, ensuring the process of tracking decisions, processes and data used by the systems, maintaining confidentiality and impartiality; 5) the responsibility of each participant participating during the entire life cycle of the AI system for the proper functioning of the systems and compliance with all the principles defined by the OECD in accordance with their level of involvement.

Thus, the OECD also emphasizes the need for responsible use of AI systems and promotes the idea of countries harmonizing their domestic policies regarding the development of AI. The OECD is making efforts to create a universal platform within which member states of the organization will be able to exchange information and best practices on the use of AI and establish cooperation in this area.

The European Union is trying hard to maintain its primacy in the issue of legal regulation of artificial intelligence technologies. And as of today, he succeeds. Yes, currently in the European Union, the issues of using AI technologies are regulated in almost the most detailed way.

A significant event from the point of view of international legal regulation of AI took place in April 2021, when the European Commission published the Proposal for Regulation of the European Parliament and of the Council 2021/0106 (COD), which harmonizes the rules on artificial intelligence (Artificial Intelligence Act) and amends the some legislative acts of the European Union (EU, 2021).

First of all, it is worth noting that this document proposed another definition of an AI system, which, according to its provisions, means "software developed using one or more methods and approaches (which include: machine learning, including with deep learning; logic and knowledge-based approaches, including knowledge representation, logic programming, symbolic reasoning, and expert systems; statistical approaches, Bayesian inference, and optimization methods) and which is capable of a given set of human-defined objectives, generate outputs such as content, predictions, recommendations or decisions that affect the environment they interact with". It is worth noting that, in addition to the fact that this definition is quite detailed, it also contains a list of methods and approaches that were issued by the European Commission in a separate Annex and that can be constantly supplemented with the development of technology, thus extending the legal scope of the document to new technical approaches and methods.

In the document proposed for discussion, the European Commission used a differentiated approach to AI systems, distinguishing: certain types of artificial intelligence systems that are prohibited; high-risk AI systems; and low-risk AI systems. Also, it is worth noting that this Regulation does not apply to AI systems that are developed or used exclusively for military purposes.

The category of AI systems, which are prohibited to be placed on the market, put into operation and used, include: systems capable of distorting human behavior or causing physical or psychological harm to him, using methods outside of human consciousness; or using any vulnerability of a certain group of persons due to their age, physical or mental disabilities and systems for real-time remote biometric identification in public places, provided that such identification would not be justified taking into account the specified conditions. Also, this list includes systems, accommodation. commissioning or use of which is prohibited by state authorities or persons authorized by them, capable of evaluating or classifying individuals according to reliability criteria based on social behavior or personal characteristics.

The document regulates the use of high-risk AI systems in most detail. In accordance with the provisions of the Regulation, they mean: 1) AI systems that are either used as security components of another product or are themselves products covered by the legislation of the European Union listed in the relevant annex, or 2) products whose security components are AI systems, or the artificial intelligence system itself, in accordance with the EU legislation listed in the relevant annex, must undergo a third-party conformity assessment in order to be placed on the market or put into operation. A separate annex also contains a list of high-risk AI systems, which include AI systems in the following areas: remote biometric identification, critical infrastructure management, education and training, employment, assistance through basic private and public services, law enforcement, including use by law enforcement agencies for the purpose of predicting relapses, detecting deep fakes, determining the reliability of evidence and criminal analytics, migration, asylum and border control, as well as in the field of justice, which includes AI systems used to assist judicial authorities in the investigation and interpretation of facts and rules of law, as well as in the application of rules of law to a specific set of facts. This list is by no means exhaustive, for now it only gives us an idea of the European Union's approach to understanding high-risk AI systems. The regulations describe the obligations for persons using artificial intelligence in great detail. And although the largest amount of obligations is provided for persons whom the Regulation defines as suppliers, it also imposes obligations on users, third parties and other persons who participate in any way during the life cycle of artificial intelligence.

As for low-risk AI systems, they are not singled out, the Regulation only defines them as other artificial intelligence systems, that is, those that do not fall into the categories of prohibited and high-risk systems and provides for a number of obligations regarding the transparency of the use of such systems. Such as: the obligation to inform individuals that they are interacting with artificial intelligence systems, or emotion recognition systems, or systems capable of generating images or other content that resemble existing objects, places, events, or people and may create an impression their authenticity.

So far, the European Union's Artificial Intelligence Act may be the most detailed document governing the use of artificial intelligence and the risks associated with it, in fact the first-ever AI legislative framework created within an international organization.

Other regional organizations are currently still in the process of forming a legal framework for artificial intelligence.

Ten countries from the Baltic and Scandinavian regions signed a joint Declaration on Artificial Intelligence in 2018, in which they agreed to promote the use of AI for the benefit of humanity and to cooperate in order to develop ethical standards, values and principles for the use of AI, improve the skills of

its use, and improve the technologies of its application in in the field of providing services to individuals and legal entities, ensuring trust, confidentiality, security and ease of use, and at the same time avoiding unnecessary regulation, taking into account the speed of technological development.

Within the framework of the African Union and the League of Arab States, only working groups on the formation of a common vision and the development of legal provisions in the field of the use of AI have been created, but they have not yet crystallized into separate documents that would reflect the approach or strategic vision of these regions. Most of the legislative initiatives are currently implemented at the national level. According to the OECD, at least 60 countries have adopted national strategies for the use of artificial intelligence technologies OECD (2023).

Research Findings and Prospects As we can see, there is an active process of forming the legal basis for the regulation of AI in the framework of both universal and regional international organizations. Having great potential for use in the public and private sectors, AI technologies penetrate more and more spheres of social life, undoubtedly creating a number of advantages, but the complexity of the technology itself and the speed of its development also increase the risks of its application. It was this awareness that contributed to the emergence of coordinated efforts at the international level regarding the international legal regulation of artificial intelligence.

REFERENCES:

UNICRI (2022). UNICRI Centre for Artificial Intelligence and Robotics: Strategic Plan 2020–2025. URL: https://unicri.it/topics/ai_robotics.

United Nations (2022). Summary of the Chairperson and the Rapporteur of the work of Working Group IV (Electronic Commerce) at its sixty-third session, New York, 2022: Summary dated 09.05.2022. URL: <https://documents-dds-ny.un.org/doc/UNDOC/GEN/V22/028/06/PDF/V2202806.pdf?OpenElement>.

EU (2021). Artificial Intelligence Act: Proposal for a Regulation of the European Parliament and of the Council Laying Down Harmonised Rules on Artificial Intelligence and Amending Certain Union Legislative Acts dated 21.04.2021. URL: <https://digital-strategy.ec.europa.eu/en/library/proposal-regulation-laying-down-harmonised-rules-artificial-intelligence>).

OECD (2023). The Strategic and Responsible Use of Artificial Intelligence in the Public Sector of Latin America and the Caribbean, 2023. URL: <https://www.oecd-ilibrary.org/sites/636827ae-en/index.html?itemId=/content/component/636827ae-en#endnotea2z6>.

Advancing work on automated contracting: Note by the Secretariat of United Nations Commission on International Trade Law dated 01.02.2023. URL: <https://documents-dds-ny.un.org/doc/UNDOC/LTD/V23/004/72/PDF/V2300472.pdf?OpenElement>.

Ethics Guidelines for Trustworthy AI. High-Level Expert Group on Artificial Intelligence, 08.04.2019. URL: <https://digital-strategy.ec.europa.eu/en/library/ethics-guidelines-trustworthy-ai>.

ITU-T Artificial Intelligence standardization roadmap: Recommendations dated 01-12.03.2021. URL: <https://www.itu.int/ITU-T/recommendations/rec.aspx?rec=15249&lang=en>.

ITU-T Overview of convergence of artificial intelligence and blockchain: Recommendations dated April 2021. URL: <https://www.itu.int/ITU-T/recommendations/rec.aspx?rec=14651&lang=en>.

Legal issues related to the digital economy: Note by the Secretariat dated 08.05.2020. URL: <https://documents-dds-ny.un.org/doc/UNDOC/GEN/V20/024/68/PDF/V2002468.pdf>.

OECD Recommendation of the Council on Artificial Intelligence: Recommendation dated 22.05.2019. URL: <https://legalinstruments.oecd.org/en/instruments/OECD-LEGAL-0449>.

Overview of convergence of artificial intelligence and blockchain: Overview of the International Telecommunication Union dated 30.04.2021. URL: <https://www.itu.int/rec/T-REC-F.Sup4-202104-I>.

Report of Working Group IV (Electronic Commerce) on the work of its sixty-fourth session: Report dated 31.10.2022–04.11.2022. URL: <https://documents-dds-ny.un.org/doc/UNDOC/GEN/V22/177/29/PDF/V2217729.pdf?OpenElement>.

Road map for digital cooperation: implementation of the recommendations of the High-level Panel on Digital Cooperation: Report of the Secretary-General dated 29.05.2020. URL: <https://www.un.org/ru/content/digital-cooperation-roadmap/>.

Summary of the Chairperson and the Rapporteur of the work of Working Group IV (Electronic Commerce) at its sixty-third session, New York, 2022: Summary dated 09.05.2022. URL: <https://documents-dds-ny.un.org/doc/UNDOC/GEN/V22/028/06/PDF/V2202806.pdf?OpenElement>.

The National Artificial Intelligence Research And Development Strategic Plan: 2019 Update. A Report by the Select Committee On Artificial Intelligence of the National Science & Technology Council dated June 2019. URL: <https://www.nitrd.gov/pubs/National-AI-RD-Strategy-2019.pdf>.

The Strategic and Responsible Use of Artificial Intelligence in the Public Sector of Latin America and the Caribbean, 2023. URL: <https://www.oecd-ilibrary.org/sites/636827ae-en/index.html?itemId=/content/component/636827ae-en#endnotea2z6>.

The use of artificial intelligence and automation in contracting: Note by the Secretariat of United Nations Commission on International Trade Law dated 25.02.2022. URL: <https://documents-dds-ny.un.org/doc/UNDOC/LTD/V22/011/17/PDF/V2201117.pdf?OpenElement>.

UNCITRAL Model Law on Electronic Commerce with Guide to Enactment 1996 with additional article 5 bis as adopted in 1998. United Nations publication, 1999. URL: https://uncitral.un.org/sites/uncitral.un.org/files/media-documents/uncitral/en/19-04970_ebook.pdf.

UNESCO Recommendation on the Ethics of Artificial Intelligence: Recommendation dated 23.11.2021. URL: <https://unesdoc.unesco.org/ark:/48223/pf0000381137>.

UNICRI Centre for Artificial Intelligence and Robotics: Strategic Plan 2020-2025 URL: https://unicri.it/topics/ai_robotics.

UNIDROIT Principles of International Commercial Contracts / International Institute for the Unification of Private Law, 2016. URL: www.unidroit.org/wp-content/uploads/2021/06/Unidroit-Principles-2016-English-i.pdf.

White Paper on Artificial Intelligence: a European approach to excellence and trust: European Commission Publication COM(2020) 65 final dated 19.02.2020. URL:

https://commission.europa.eu/publications/white-paper-artificial-intelligence-european-approach-excellence-and-trust_en.

AUTHOR (S) BIOSKETCHES



Hanushchak-Yefimenko Liudmyla, Doctor of Economics, Professor, Vice-Rector for Research and Innovation, Kyiv National University of Technologies and Design, Ukraine

<https://orcid.org/0000-0002-4458-2984>

Scopus Author ID: 35758920800

Researcher ID: Q-2309-2016

E-mail: glm5@ukr.net



Hrytsun Vadym, Graduate student, Kyiv National University of Technologies and Design, Ukraine

E-mail: vadimgritsun@gmail.com

COPYRIGHTS

©2023 The author(s). This is an open access article distributed under the terms of the Creative Commons Attribution (CC BY 4.0), which permits unrestricted use, distribution, and reproduction in any medium, as long as the original authors and source are cited. No permission is required from the authors or the publishers.

HOW TO CITE THIS ARTICLE

Hanushchak-Iefimenko, L., Hrytsun, V. (2023). Foreign experience in managing the development of entrepreneurship using artificial intelligence. *Management*, 2(38): 157–167. <https://doi.org/10.30857/2415-3206.2023.2.13>.

JEL Classification:
G34, O16

UDC 332:65:637.1

DOI: 10.30857/2415-
3206.2023.2.14

METHODOLOGICAL AND LEGAL ASPECTS OF EVALUATING THE EFFECTIVENESS OF CORPORATE MANAGEMENT OF COMPANIES

Tetiana KRAKHMALOVA¹

¹ *National Academy of Internal Affairs, Kyiv, Ukraine*

Introduction. Modern enterprises in Ukraine are characterized by the dominance of the influence of corporate features and characteristics. This is what makes it necessary to develop a methodology for evaluating the effectiveness of corporate management. Hence there is a need to clarify the methodological foundations of the concept of corporate governance and the problem of ensuring its effectiveness, which in applied terms is primarily related to the creation of a mechanism for managing corporate relations and a corresponding model of managerial actions.

The hypothesis of the scientific research consists in substantiating the conceptual model for evaluating the effectiveness of corporate management of companies using legal aspects and factors of influence of state regulation.

The purpose of the study is the formation of methodological and legal aspects of evaluating the effectiveness of corporate management of companies

The methodology of scientific research is the evaluation of the socio-economic efficiency of corporate management, which consists in determining the level of achievement of the balance of the interests of persons interested in the company's activities, involves the analysis of the interests of all participants in corporate

relations and the determination of relevant criteria and performance indicators, combined into two groups: financial and non-financial investors. One of the main methods is dialectical, since all phenomena are considered as a whole. Specific methods: analysis and forecast – when evaluating the management system according to various criteria; company standards – to compare the obtained indicators with the existing system of company standards and norms.

Conclusions and prospects for further research. The essence of the effectiveness of corporate governance lies in ensuring the balance of interests of participants in corporate relations. The universal character of such relations for any organizational and legal forms of enterprises with corporate features is substantiated.

The analysis of the corporate sector and socio-economic factors of the effectiveness of corporate governance in the economy of Ukraine testified to the significant real impact of different orientations of interests, motives, and strategic goals of various corporate groups.

Keywords: management efficiency; evaluation; organizational and legal support; corporate relations; corporate management.

NUMBER OF REFERENCES	NUMBER OF FIGURES	NUMBER OF TABLES
10	1	0

JEL Classification:
G34, O16

УДК 332:65:637.1

DOI: 10.30857/2415-
3206.2023.2.14

**МЕТОДИКО-ПРАВОВІ
ОЦІНЮВАННЯ
КОРПОРАТИВНОГО
КОМПАНІЯМИ**

**АСПЕКТИ
ЕФЕКТИВНОСТІ
УПРАВЛІННЯ**

Тетяна КРАХМАЛЬОВА¹

¹ *Національна академія внутрішніх справ, Київ,
Україна*

Вступ. Для сучасних підприємств в Україні характерним є домінування впливу корпоративних рис і характеристик. Саме це зумовлює необхідність розроблення методики оцінювання ефективності корпоративного управління. Звідси постає потреба уточнення методологічних основ поняття корпоративного управління та проблеми щодо забезпечення його ефективності, що в прикладному плані пов'язано передусім із створенням механізму управління корпоративними відносинами і відповідної моделі управлінських дій.

Гіпотеза наукового дослідження полягає у обґрунтуванні концептуальної моделі оцінювання ефективності корпоративного управління компаніями з використанням правових аспектів та чинників впливу державного регулювання.

Метою дослідження є формування методико-правових аспектів оцінювання ефективності корпоративного управління компаніями

Методологією наукового дослідження є оцінювання соціально-економічної ефективності корпоративного управління, яка полягає у визначенні рівня досягнення балансу інтересів зацікавлених у діяльності компаній осіб, передбачає проведення аналізу інтересів усіх учасників корпоративних

відносин і визначення відповідних критеріїв та показників ефективності, об'єднаних у дві групи: фінансові та не фінансові інвестори. Одним із основних методів є діалектичний, оскільки всі явища розглядаються як єдине ціле. Специфічні методи: аналізу й прогнозу – при оцінці системи управління за різними критеріями; норм компаній – для співставлення отриманих показників з наявною системою норм і норм компаній.

Висновки та перспективи подальших досліджень. Сутність ефективності корпоративного управління полягає у забезпеченні балансу інтересів учасників корпоративних відносин. Обґрунтовується універсальний характер таких відносин для будь-яких організаційно-правових форм підприємств, що мають корпоративні ознаки.

Аналіз корпоративного сектору та соціально-економічних факторів ефективності корпоративного управління в економіці України засвідчив про значний реальний вплив різної спрямованості інтересів, мотивів, стратегічних цілей різних корпоративних груп.

Ключові слова: ефективність управління; оцінювання; організаційно-правове забезпечення; корпоративні відносини; корпоративне управління.

Problem statement The importance of the problems of corporate governance for the country's economy makes it necessary to determine its state and evaluate its effectiveness based on the study of the system of forming factors at enterprises. The purpose of such an assessment is to obtain information about the state of corporate governance, which can be used both when making investment decisions (by external users) and when determining directions for improving management (by internal users). The essence of the problem is that, on the one hand, such evaluation cannot be carried out by companies based on a single indicator and requires a certain system of multifaceted indicators, and, on the other hand, the use of some integral evaluation indicator may not reveal the corporate nature of the problem.

Analysis of recent research on the problem Previous studies of companies testify that there is no single universally recognized approach to evaluating corporate governance. A number of different so-called "codes of best practice", for example (Goncharenko and Išoraitė, 2019; Zhygalkevych and Zalutskyi, 2023; Nebava, 2011; Shkoda, 2022), of corporate governance, which take into account differences in legislation, the structure of management bodies and conduct of business in one or another country and taking into account the specifics of the firm. It can be argued that there is no single recognized indicator of the excellence/efficiency of corporate governance, as well as the coverage in the scientific literature of various methodological approaches to assessing the effectiveness of corporate governance. In this regard, the issue of creating a national methodology that would take into account the specifics of the functioning of domestic corporate enterprises and, accordingly, the system of factors that determine the state of corporate governance, remains relevant.

The purpose of the study there is research and formation of regulatory aspects of corporate governance effectiveness assessment.

Presentation of the main material The methods of international companies deserve special attention, the analysis of which allows you to evaluate the approaches to solving the problem in the countries of the world under other models of corporate governance, as well as to evaluate the possibility of using such methods in the post-Soviet space. Here are some of the most common methods.

Thus, the rating agency Standard & Poor's uses the definition of the level of corporate governance (CGS) (Goncharenko and Išoraitė, 2019; Zhygalkevych and Zalutskyi, 2023). This indicator is quite well-known and is considered to be the one that most accurately reflects corporate governance and its level compliance with certain standards. The CGS calculation methodology involves determining the compliance of real corporate governance with regard to the so-called universal principles (honesty, transparency, accountability, responsibility). For the purposes of CGS analysis, the concept of corporate

governance includes the relationships between the company's managers, members of its board of directors (supervisory board), shareholders and other financially interested persons. Based on the analysis of the received data regarding the company's compliance with the corporate governance codes and rules developed according to the best practice, the Standard & Poor's agency assigns the CGS corporate governance level on a scale from CGS-10 (higher level) to CGS-1 (lower level). The determination of such a level aims at the analysis of two components: the company's rating and the national background. The company's rating is evaluated based on the effectiveness of the interaction between management bodies, the board of directors, the company's shareholders and other interested parties. Within this component, the internal structure and management processes of an individual company are primarily evaluated. Such subcomponents include:

- ownership structure (transparency of the ownership structure, concentration of ownership and influence on decision-making);
- relations with financially interested persons (regularity of shareholders' meetings, ease of access to such meetings and availability of information about them, voting procedure and procedures of shareholders' meetings, violation of shareholders' rights);
- financial transparency and information disclosure (quality and content of published information, timeliness and availability of published information, independence and reputation of the company's auditor);
- the composition and practice of the board of directors (the structure and composition of the board of directors, its role and efficiency, the role and independence of third-party directors, policy regarding the impact of remuneration to directors and members of senior management, evaluation of the quality of their work) (Nebava, 2011; Shkoda, 2022).

The analysis of the national background involves an assessment of the effectiveness of the legal, regulatory and information infrastructure in the country. This component assesses how external factors at the macroeconomic level affect the quality of the company's corporate governance. Such an analysis includes four areas: the legal environment; regulation; information infrastructure; market infrastructure.

To assign the rating, both the survey and the following objective information are used: the company's annual and quarterly reports for the last three years; the company's charter and internal regulatory documents of the company; reporting provided to state bodies; minutes of ordinary and extraordinary meetings of shareholders for the past three years; minutes of meetings of the board of directors (supervisory boards) for the last three years; published information on new share issues; data on shareholders owning more than 10% of shares and creditors; information on fines, fines and other sanctions

in connection with publicly recorded violations of shareholders' rights, including pending lawsuits; information on the structure and composition of the board of directors; information about the auditor of the company; information on major deals over the past 3 years, the amount of which is more than 10% of the net value of the company's assets; information about the registrar, etc. (Fedulova et al., 2007).

The corporate governance rating of the consulting firm Deminor (DR), which specializes in services for the protection of the rights of institutional, legal and corporate minority investors, is based on the application of international standards of corporate governance and is calculated on a scale from DR-10 (higher rating) to DR-1 (lower) rating) (Fedulova et al., 2007). The DR rating is assigned to companies at their behest or at the request of investors who wish to purchase the company's shares. Four factors are evaluated for assigning the DR rating: compliance with the rights of shareholders and their fulfillment of their duties; payment of dividends to the company; transparency of corporate governance procedures; structure and functions of management bodies of companies.

The corporate governance quotient (CGQ), proposed by Institutional Shareholder Services (ISS), differs from others in that it takes into account not only the corporate governance structure of the company, but also its position on the market (Fedulova et al., 2007). The CGQ is based on an assessment of 51 factors, divided into seven groups: composition and structure of governing bodies; company charter and internal regulatory documents; compliance with legislation; compensation for members of executive management bodies; qualitative factors, including the implementation of financial plans; property of managers and employees of the company; education of managers.

Indicators of corporate management companies Davis Global Advisors, Inc. (DGA) is used to assess the state of corporate governance in individual countries. At the same time, the following factors are evaluated (on a 10-point scale) (Baula, 2016).

1. The structure of the board of directors (supervisory board) – application of the code of best practices of corporate governance, the presence in the board of directors of persons who are not part of the executive bodies and are not employees of the company, the independence of the board of directors, the distribution of powers of the chairman of the board of directors (supervisory board) and the chairman board (executive director), committee of the board of directors.

2. The right to vote.

3. Transparency (accounting standards, disclosure of information about managers' salaries).

4. Protection of property rights.

The corporate governance risk index (CGR according to the Crichton-Miller and Workman method is used to assess the risk of losses of investor companies from unsatisfactory corporate governance in individual countries. If DGA is used mainly for developed countries, then CGR is for countries with transition economies. This method is based on questions are divided into four groups, among which subgroups with relevant questions are distinguished.

1. Assessment of current legislation (registration of shares and other company securities, rights of parties – shareholders, creditors, employees, managers, etc., implementation of shareholder rights, compliance with openness and control, quality of contracts, bankruptcy, interests of members of management bodies).

2. Evaluation of legal processes (availability, efficiency and speed of legal protection, arbitration, influence on decisions of judicial bodies, implementation of laws and court decisions).

3. Assessment of the regulatory regime (capital market regulator, central bank, financial control, insider trading, fair competition, accounting in companies, audit).

4. Evaluation of "ethical coverage" – the fight against organized crime, the role of criminal groups, the level of corruption, violence against business, overpayments by companies, tender processes, bribes (Baula and Hanushchak-Iefimenko, 2016).

Questions within groups and subgroups require an unambiguous answer: "yes" or "no", which allows the company to calculate the specific weight of positive and negative answers, build a rating scale and determine the CGR index. The index can have the following values: 0–5 (very high); 6–10 (tall); 11–20 (average); 21–28 (low). Each group of questions is scored from 0 to 7.

Among the most meaningful methods are the works of L. Fedulova (Fedulova et al., 2007), which suggests evaluating the level of corporate governance in three directions: corporate regulations, corporate culture, and economic efficiency of companies. A set of factors belonging to a certain direction can be combined into blocks characterizing different aspects of corporate governance. In general, the state of corporate governance in the company is assessed according to the following scheme:

1. Factors determining compliance with corporate regulations.

Block 1.1. Ownership structure (availability of declared but unissued shares, presence of a shareholder with a controlling/blocking block of shares, preference in the ownership structure of the share of company managers, presence of a state share in the capital of companies, presence of a foreign strategic investor, presence of a share of joint-stock company employees in the capital of companies, presence in the charter of norms, which prevent "dilution" of capital.

2. Factors determining the level of corporate culture.

Block 2.1. Ownership (transparency of the company's ownership structure, the influence of minority shareholders on decision-making, the presence of informal mechanisms for limiting the rights of shareholders-employees of the enterprise, the priority of the rights of the state as a shareholder of companies).

Block 2.2. Relations with interested groups (ease of access to shareholders' meetings, the possibility for shareholders to adjust the agenda of general meetings, availability of transparent contracts with company managers, openness of procedures for choosing business partners of companies, availability of a strong partner bank, participation of company employees in decision-making).

Block 2.3. The company's financial culture (timeliness and completeness of settlements with business partners, timeliness of dividend payments, timeliness and completeness of payments, availability of regulations that prevent trading based on insider information, independence and reputation of the company's auditor).

Block 2.4. Activities of the Supervisory Board (the influence of the Supervisory Board on the formation of the strategy and ensuring the protection of shareholders' rights, compliance with the requirements regarding the independence of the members of the Supervisory Board, the role of the board in the settlement of intra-corporate conflicts, the transparency of the procedures for calculating remuneration and assessing the quality of work of its members).

Block 2.5. An initiative in the field of corporate governance (observance of principles of corporate governance, adoption of normative documents regulating corporate relations, formation of Supervisory Board committees, involvement of a new team of managers, regulation of conflict of interests in the company, establishment of principles of motivation of management personnel, formation of corporate traditions).

3. Factors characterizing management efficiency.

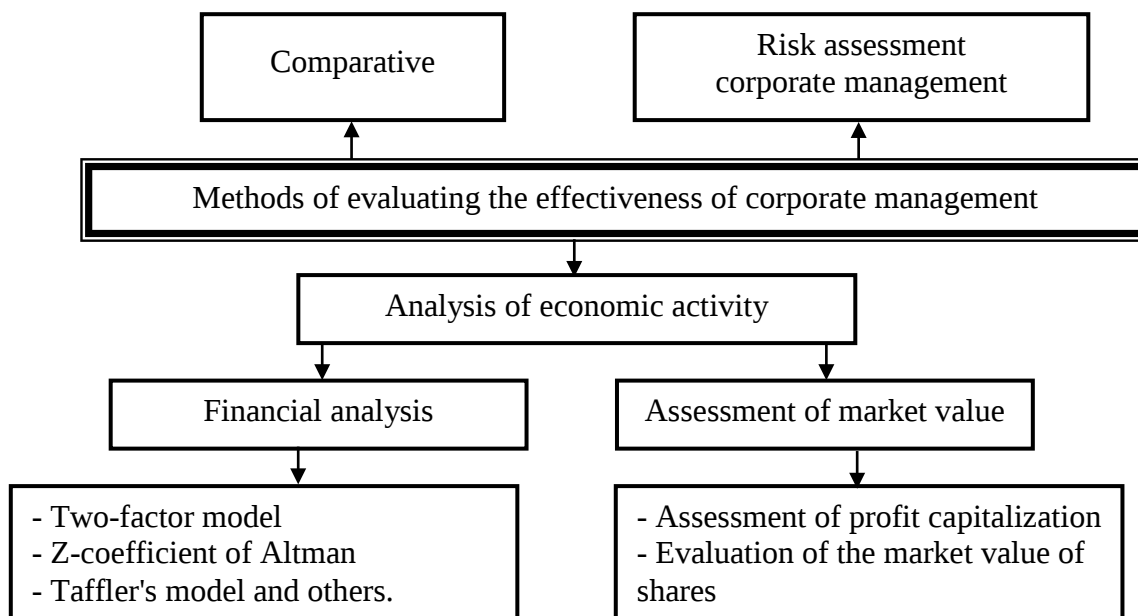
Block 3.1. Modernization of the management structure (decentralization, creation of separate departments, merger of divisions, creation of innovative firms within the company, formation of divisional structures, creation of divisions for organizational development of the company, cancellation of unprofitable production).

Block 3.2. Increasing economic efficiency (ensuring the financial stability of companies, achieving positive financial results, increasing the return on equity, increasing the absolute value of dividends and the share of profit directed to the payment of dividends, achieving growth in sales volumes) (Goncharenko and Išoraitė, 2019).

Thus, as a whole, the above criteria and indicators are aimed, first of all, at assessing the extent to which the company's corporate governance system

complies with international principles for the protection of shareholders' rights, how safe the investment will be for potential investors, the extent to which the actions of managers are controlled by the Supervisory Board and, based on this, how effective corporate governance is. In such an evaluation scheme, as in other analogues, the evaluation mechanism is traced based on both traditionally quantitative (for example, economic) indicators and indicators that can only be evaluated subjectively. Different approaches are united by the fact that the number of proposed indicators is quite numerous, and hence, we believe that evaluating the effectiveness of corporate governance is an analytical process that requires a large amount of information and time consumption, as well as the expertise of analysts.

The theoretical analysis of research in the field of evaluating the effectiveness of corporate management gives grounds to conclude about the possibility of dividing various methods (Fig. 1) into certain groups. Yes, the comparative method and the method of assessing the risk of corporate governance are qualitative methods. Methods of evaluating the effectiveness of corporate management, based on the analysis of the economic activity of the corporation, which also generalize the methods of assessing the financial condition and the methods of assessing the market value, can be considered quantitative methods.



Source: adapted from (Hanushchak-Iefimenko, 2014; Goncharenko and Işoraité, 2019).

Fig. 1. Methods of assessing the effectiveness of corporate management

Existing approaches to evaluating the effectiveness of corporate governance from the point of view of the corporation's market value involve the availability of various methods. Among the main ones is the determination of

the market value based on the assessment of the capitalization of the income of the corporation, another – on the basis of the exchange rate of the corporation's shares.

In the first approach, the price of the enterprise is determined by the capitalization of profit according to the formula:

$$V = \frac{P}{K}, \quad (1)$$

P – expected profit to be paid, as well as interest on loans and dividends;

K – weighted average value of liabilities (obligations) of the firm (average percentage showing interest and dividends that must be paid in accordance with market conditions for loan and equity capital) (Fedulova et al., 2007).

A decrease in the price of an enterprise means a decrease in its profitability or an increase in the average value of liabilities (demands of banks, shareholders and other investors) (Fedulova et al., 2007). Forecasting the expected decline requires an analysis of profitability prospects and interest rates, while it is advisable to calculate the price of the enterprise for the near and long term.

L. Shveykina and others. propose to evaluate the effectiveness of corporate governance using the corporate conflict intensity index (IIKK) (Moroz et al., 2001), which reflects with a certain probability the state of relations between shareholders for each of the studied enterprises. Quantification of the index is carried out according to the following formula:

$$CCI = d_0 \cdot \sum_{i=1}^N d_i, \quad (2)$$

N – the number of events involved in building the index;

i – event number;

d_i – a dummy variable that takes on a certain value depending on whether the event actually happened;

d_0 – a dummy variable that takes the value of zero in the event that the company has a shareholder who owns more than 50% of the shares, and the value of one in all other cases.

Lower values of IIKK indicate a lower level of conflict between the company's shareholders. Accordingly, the higher the value of the index, the higher the intensity of corporate conflict and the lower the efficiency of management.

The following group of events is taken into account:

1) the existence of a shareholder who owns more than 50% of the shares (d_0 takes the value 0 when there is no such shareholder and 1 when there is).

2) payment of dividends on preferred shares (d_1 takes on the value 1 when the payment was made, and 0 when it was not).

3) acquisition of its shares by the enterprise; sale (transfer) of shares to employees (d_2 takes on the value of 1 when such a sale took place, and 0 when it did not take place).

4) a new issue that is not related to the revaluation of fixed assets (d_3 takes on the value of 1 when there was an issue, and 0 when there was no issue).

5) how many general meetings of shareholders were held in the last three years (d_4 – number of meetings).

The method proposed by the authors provides for the creation of an effective control mechanism that could prevent insiders from manipulating assets, however, according to the authors, this should be a reasonable compromise between the need to provide small shareholders with means of protection in case of violation of their rights and the possibility of preventing blackmail of corporations on the basis of unfounded requirements (lawsuits). The last point is important, because evaluating the effectiveness of corporate governance cannot bypass moral and ethical aspects. Such aspects can, under certain conditions (if they are carried out from the point of view of the priorities of some group of participants in corporate relations) become an obstacle to a correct assessment. Moreover, this factor can be considered one of the main principle points in the formation of the evaluation methodology: hence, the corresponding methodology should be as free from subjectivism as possible.

Research Findings and Prospects. Each of the methods, in our opinion, reveals only certain aspects of features, advantages or disadvantages of corporate management at a specific enterprise or industry as a whole. The disadvantages of these methods are that when using them, it is not possible to describe the effectiveness of corporatization in dynamics, to model, and therefore, to predictably optimize this process. It should be noted a number of fundamental points that should be taken into account when developing alternative methodical products. Firstly, foreign methods, given the realities of the corporatization process in Ukraine as a whole, are problematic to use in Ukraine for a number of reasons, among which the main ones, in our opinion, are the impossibility of obtaining complete or at least approximate information on most criteria, as well as that the most important thing is the fundamentally different nature of corporate relations, and, hence, the problematic field in which the corporate management systems of domestic enterprises, at least most of them, function. In scientific works, the point of view that individual companies and countries as a whole should realize that their investment image depends primarily on the level of compliance of corporate governance with international standards is quite common (Yermoshenko and Hanushchak-Iefimenko, 2010). In turn, such a statement of the question appears to us to be very simplified in view

of the lack of a single model of corporate governance, great differences between different models, and also – and this is the main thing – in view of the fact that the domestic experience of corporatization is, as will be shown in the work below, unique and little-studied, as well as in need of proper methodological and methodical substantiation.

Secondly, it is extremely important to create a system of criteria and indicators that could be used to assess the effectiveness of corporate governance. As you can see, the number of such indicators is very large, and the indicators differ sharply in different methods. At the same time, these methods cover one fundamental problem field of implementation in each specific example of corporate relations, and this field of analysis has both an economic and a broad social meaning. We believe that among the criteria and indicators in the methods mentioned above, it is possible to differentiate them in the following directions: 1) purely economic indicators of efficiency, which at the same time are based on traditional quantitative and qualitative evaluation indicators; 2) indicators related to the evaluation of the perfection of corporate culture, which are quite difficult to measure quantitatively; 3) indicators that try to reflect the dependence of the effectiveness of corporate governance on the distribution of power at a specific enterprise; 4) indicators of organizational content, which cover issues of the process of organizing corporate relations and management as a whole. The criteria and indicators of all the analyzed methods can be presented in such a differentiation scheme.

The essence of corporate governance should reproduce, first of all, such general elements as the validity of the goals of real corporate governance systems, relations between different groups of participants in corporate relations, regulation of these relations primarily at the level of a specific economic entity.

REFERENCES:

Baula, A. (2016). Corporate social responsibility as a basis for development strategy. *Management*, 24: 213–216. URL: http://nbuv.gov.ua/UJRN/Menedzhment_2016_24_23.

Baula, O. V., Hanushchak-Iefimenko, L. M. (2016). Suchasni aspekty formuvannia korporativno-sotsialnoi vidpovidalnosti v Ukraini [Modern aspects of the formation of corporate social responsibility in Ukraine]. *Formuvannia rynkovykh vidnosyn v Ukraini = Formation of market relations in Ukraine*, 11: 26–28. URL: http://nbuv.gov.ua/UJRN/frvu_2016_11_7 [in Ukrainian].

Yermoshenko, M. M., Hanushchak-Iefimenko, L. M. (2010). Mekhanizm rozvytku innovatsiinoho potentsialu klasteroobiednanykh pidpriemstv: monohrafiia [Mechanism of development of innovative potential of cluster-united enterprises: monograph]. Kyiv: National Academy of Management. 236 p. URL: <https://legal.nam.edu.ua/monographs/5/files/publication.pdf> [in Ukrainian].

Hanushchak-Iefimenko, L. M. (2014). Innovatsiinyi rozvytok pidpriemnytstva v Ukraini: stratehichni oriientyry: monohrafiia [Innovative development of entrepreneurship in Ukraine: strategic orientations: monograph]. Kyiv: National Academy of Management. 400 p. [in Ukrainian].

Goncharenko, I., Işoraitė, M. (2019) Creation of an integrated open coworking center for innovation entrepreneurship in higher education institutions. *Management*, 1 (29): 35–46. DOI: 10.30857/2415-3206.2019.1.3.

Zhygalkevych, Zh. M., Zalutskyi, R. O. (2023). Improving the quality of business processes of enterprises based on digitization. *Journal of Strategic Economic Research*, (2): 84–93. DOI: <https://doi.org/10.30857/2786-5398.2023.2.9>.

Nebava, M. I. (2011). Korporatyvne upravlinnia: navchalno-metodychnyi posibnyk [Corporate management: training manual]. Vinnytsia: VNTU. 77 p. [in Ukrainian].

Shkoda, M. S. (2022). Zarubizhna praktyka rozvytku mizhrehionalnykh ta mizhhaluzevykh system klasternoho partnerstva [Foreign practice of the development of interregional and interbranch cluster partnership systems]. *Journal of Strategic Economic Research*, 4 (9): 67–8. DOI: <https://doi.org/10.30857/2786-5398.2022.4.7> [in Ukrainian].

Fedulova, L. I., Osetskyi, L. V., Honcharov, Yu. V., Rudchenko, O. Yu., Bazhal, Yu. M. (2007). Korporativni struktury v natsionalnii innovatsiinii systemi Ukrainy: monohrafiia [Corporate structures in the national innovation system of Ukraine: monograph]. Kyiv. 812 p. [in Ukrainian].

Moroz, O. V., Skurtol, S. D., Tkachuk, L. M., Shveikina, L. Ya. (2001). Faktor yakosti v zahalnoi modeli konkurentospromozhnosti vitchyznianskykh pidpriemstv [Quality factor in the general model of competitiveness of domestic enterprises. Economics: problems of theory and practice: a collection of scientific papers]. *Ekonomika: problemy teorii ta praktyky: zbirnyk nauk. prats.*, Dnipropetrovsk: DNU, Vol. 81, P. 44–48 [in Ukrainian].

AUTHOR (S) BIOSKETCHES



Krakhmalova Tetiana, Doctor of Philosophy, Departanent of Economic Security and Financial Investigations, National Academy of Internal Affairs, Kyiv, Ukraine.

<https://orcid.org/0000-0003-1578-8286>

E-mail: tetiana12tatiana@gmail.com

COPYRIGHTS

©2023 The author(s). This is an open access article distributed under the terms of the Creative Commons Attribution (CC BY 4.0), which permits unrestricted use, distribution, and reproduction in any medium, as long as the original authors and source are cited. No permission is required from the authors or the publishers.

HOW TO CITE THIS ARTICLE

Krakhmalova, T. (2023). Methodological and legal aspects of evaluating the effectiveness of corporate management of companies. *Management*, 2(38): 168–179. <https://doi.org/10.30857/2415-3206.2023.2.14>.

JEL Classification:
L26

UDC 336.341

DOI: 10.30857/2415-
3206.2023.2.15

METHODICAL APPROACHES TO THE ASSESSMENT OF STRUCTURAL PROPERTIES OF INTEGRATED BUSINESS STRUCTURES

Rafał REBILAS¹

¹ WSB University (Akademia WSB), Dabrowa
Gornicza, Poland

Introduction. Integrated entrepreneurship creates special advantages for the development of small and medium-sized businesses in knowledge-intensive industries, which are manifested in the formation of a suitable business environment and provision of infrastructure (innovative, production, financial, transport, telecommunications, etc.), which was previously available only to large corporate organizations closed type. This opens access to participation in the real sector of the economy for a large number of the most active subjects of innovative and economic activity – developers of new products, private entrepreneurs and owners of free financial capital.

The hypothesis of the scientific research consists in the research of scientific-methodical approaches to the assessment of structural properties regarding the development of potential and strengthening of cluster interaction within corporations with the aim of obtaining competitive advantages and a synergistic effect.

The purpose of the study is to analyze methodological approaches to the assessment of structural properties of integrated business structures.

The methodology of scientific research is scientific-methodical approaches to the

assessment of structural properties of integrated business structures. Modeling of the organization of intellectual management of the integration of business entities of partners; clustering for the development of existing potential within corporations in order to obtain competitive advantages.

Conclusions. The development of integrated entrepreneurship through the creation of virtual enterprises, corporations, clusters and networks of suppliers is today the focus of theoretical developments that have great practical significance, as they reflect the changing conditions of the functioning of organizations in the business environment.

Integration processes in entrepreneurship are focused on more effective use of all types of resources (scientific and technical, production, raw materials, financial) with the use of the latest technologies and methods of highly productive business activities, which lead to the emergence of various forms of vertical and horizontal association of business entities .

Keywords: business environment; integrated business structures; integrated processes; integrated entrepreneurship; corporatization; clustering; association; entrepreneurship; synergy.

NUMBER OF REFERENCES	NUMBER OF FIGURES	NUMBER OF TABLES
11	0	3

JEL Classification:
L26

УДК 336.341

DOI: 10.30857/2415-
3206.2023.2.15

МЕТОДИЧНІ ПІДХОДИ ДО ОЦІНЮВАННЯ СТРУКТУРНИХ ВЛАСТИВОСТЕЙ ІНТЕГРОВАНИХ БІЗНЕС СТРУКТУР

Рафал РЕБІЛАС¹

¹ Університет WSB (Академія WSB), Домброва
Гурнича, Польща

Вступ Інтегроване підприємництво створює особливі переваги для розвитку малого і середнього бізнесу в наукомістких галузях промисловості, які проявляються у формуванні відповідного бізнес-середовища і забезпеченні інфраструктурою (інноваційною, виробничою, фінансовою, транспортною, телекомунікаційною, тощо), яка раніше була доступна тільки великим корпоративним організаціям закритого типу. Це відкриває доступ для участі в реальному секторі економіки великої кількості найбільш активних суб'єктів інноваційної та господарської діяльності – розробників нових продуктів, приватних підприємців і власників вільного фінансового капіталу.

Гіпотеза наукового дослідження полягає в дослідженні науково-методичних підходів до оцінювання структурних властивостей щодо розвитку потенціалу та посилення кластерної взаємодії в складі корпорацій з метою отримання конкурентних переваг та синергетичного ефекту.

Метою дослідження є аналізування методичних підходів до оцінювання структурних властивостей інтегрованих бізнес структур.

Методологією наукового дослідження є науково-методичні підходи до оцінювання структурних властивостей інтегрованих бізнес

структур. Моделювання організації інтелектуального управління інтеграції підприємницьких суб'єктів партнерів; кластеризації для розвитку наявного потенціалу в складі корпорацій з метою отримання конкурентних переваг.

Висновки Розвиток інтегрованого підприємництва через створення віртуальних підприємств, корпорацій, кластерів і мереж постачальників, – сьогодні знаходиться в центрі уваги теоретичних розробок, що мають велику практичну значимість, оскільки вони відображають мінливі умови функціонування організацій в бізнес-середовищі.

Інтеграційні процеси в підприємстві орієнтовані на більш ефективне використання всіх видів ресурсів (науково-технічних, виробничих, сировинних, фінансових) із застосуванням новітніх технологій і способів високопродуктивного ведення підприємницької діяльності, що призводять до появи різноманітних форм вертикального і горизонтального об'єднання суб'єктів підприємництва.

Ключові слова: бізнес-середовище; інтегровані структури бізнесу; інтегровані процеси; інтегроване підприємництво; корпоратизація; кластеризація; об'єднання; підприємництво; синергія.

Problem statement. Companies join together to make the most of market opportunities that cannot be realized individually. As a result of their unification around the main business processes, multidimensional hierarchical organizational structures are formed – horizontal creative corporations, strategic alliances, modern modifications of diversified conglomerates, consortia, holdings, clusters – the new corporate business model of which involves the assessment of their structural properties, which are manifested through extensive production cooperation with suppliers of components, consumers and competing companies in order to use their production capabilities, professional knowledge and competences on the basis of outsourcing or contract manufacturing.

Analysis of recent research on the problem. If we summarize the definitions of integrated business structures that exist today, which have been analyzed in the scientific literature, we can come to the conclusion that the basis of ensuring the structural properties of IBS for the development of entrepreneurship is a temporary network of production cooperation of several business entities, individual collectives or people who own key competencies to execute a specific market order based on a single enterprise system/environment. The partnership is temporary and when a certain / set result is achieved, it can also be temporarily terminated until the next market order, and the dynamic network after the execution of the current order can be transformed with the arrival of the next regular order by attracting new or exiting / excluding old partners. The business network can also be transformed when the market situation changes, or at certain stages of the product's life cycle in the case of its moral aging (Bentler, 1990; Bert, 1981).

The purpose of the study there is research of scientific and methodical approaches to the assessment of structural properties of integrated business structures.

Presentation of the main material. The main property of business integration is that, unlike the traditional one, which focuses on centralized and decentralized structural properties, it is aimed at using common assets (resources and competencies) of several firms operating in different areas of the value chain. A comparative analysis of the structural properties of traditional and entrepreneurial integration is presented in Table 1.

Distinctive characteristics of business integration include its distributed structure open for cooperation; the modularity of construction, which consists in the autonomy and narrow specialization of the basic elements (participating enterprises) of the business network; the priority of interpersonal relationships; high status of information and telecommunication means of integration; dependence on the level of professional qualification, legal and self-awareness of the participants of the business network. As a result, it creates conditions for the formation of competitive advantages: high speed of execution of various

individualized orders; reducing the asymmetry of market information and, accordingly, transaction and aggregate costs; more complete satisfaction of individual requests of the customer; lowering barriers to entering new markets (Hanushchak-Iefimenko, 2014).

Table 1

Comparative analysis of structural properties of traditional and entrepreneurial integration

Structural properties	Traditional integration	Business integration
Advantages	Ensuring the release of affordable and high-quality goods of mass demand in large volumes; concentration of resources in order to preserve and develop the scientific, industrial and technological base of economic growth.	Adequate response to changes in individual consumer preferences and market conditions, creativity and receptiveness to innovations, which are able to ensure the realization of innovative entrepreneurial potential and the development of the economy.
Factors of competitive advantage	Material and financial assets (financial capital).	Intellectual and entrepreneurial assets (new knowledge, competences, goodwill).
Conditions of formation and development	Formal formation through the establishment of large industrial corporations with a limited right to independence; diversification of activities based on several technical areas that provide a wide range of products.	Institutional conditions for the development of knowledge-intensive industries and the material base of small innovative businesses; state support for small innovative enterprises ensures the development of promising areas of innovative activity in conditions of limited financial resources and a high risk of their non-return; legal support of innovative activity; development of production-technological, transport-logistics and information infrastructure of integrated production.
Limitations and risks	A high level of specialization and centralized regulation of activities aimed at obtaining maximum income by minimizing costs and low wages; weak receptivity to technological progress and low competitiveness, which cause low growth rates and disparities in social production, contribute to the deepening of crisis phenomena in the economy.	The complexity of the multidimensional distributed production and technological network and the associated high probability of loss of controllability, violation of economic proportions between the main types of economic activity and slowing down of economic growth; imperfect corporate adaptation and management of integrated business structures; insufficient level of corporate culture and organizational readiness for changes, lack of qualitatively new concepts, methods and tools of organizational management.

The difficulty of distinguishing and systematizing the structural properties of integrated business structures of the entrepreneurial type is due to the fact that many different, similar associated and other organizational forms of production cooperation are used in the practice of entrepreneurial activity. For example, quite often the structural properties of integrated business structures of the entrepreneurial type mean one or another form of organization of the interaction of business entities working in the field of material and technical supply and sales, production and transport logistics, and some researchers (www.clairfield.com) distinguish them into local (internal company) technological networks of production cooperation and territorially distributed (corporate and inter-corporate) networks of globally integrated production. Other researchers, as a classification feature, use the type of management, the duration of the integration formation, the field of activity, mutual dependence and interest of partners, information and telecommunication technologies used to organize the interaction of integration participants, and many others (Gordon and McCann, 2000). From the standpoint of the organizational and management tasks of the research, in our opinion, the most appropriate classification of the structural properties of integrated business structures according to the first three of the above-mentioned features, namely, the type of IBS architecture (intra- and inter-corporate networks of production cooperation); the type of IBS management (concentrated, centralized and decentralized, distributed / coordination and intelligent) and the duration of the network (temporary and long-term). According to these characteristics, two main types of structural properties of integrated business structures of the entrepreneurial type, which use different approaches to the organization of management, can be quite clearly distinguished: temporary, which arise in virtual markets of goods and services, as well as in the system of production cooperation of large industrial enterprises, which are permanently formed upon receipt of a market order and are dissolved / modified after its execution; and permanent networks of scientific and technical and / or production cooperation, focused on the continuous search and receipt of market orders in a certain field of activity (integrated contract production). A version of this classification is presented in Table 2.

It should be noted that the characteristic features of long-term integrated business structures, as a rule, include: the presence of a general corporate spirit and an atmosphere of trust, which are able to unite and keep together different creative teams, differing in interests and areas of activity; unified information environment and interaction regulations; existence of a system of long-term contractual relations between cluster network participants; selection of groups that develop and implement long-term (innovative and investment) projects. At the same time, it should be noted that intra-firm localized cooperation, which allows to distinguish a class of intelligent integrated production systems of high-

tech enterprises, identical to globally integrated (territorially distributed among corporate) production systems according to the principles of construction, operation and development.

Table 2

Classification of structural properties of integrated business structures of the entrepreneurial type

Type of IBS	Internal company cooperation	Corporate	
		Temporary	Long-term
Vertically integrated IBS (centralized control type)	Traditional mass production	Production cooperation networks, logistics systems	Infrastructure cooperation
Horizontally integrated IBS (decentralized control type)	Flexible production	Electronic markets, companies selling goods and services	Wholesale and retail networks trade
Horizontally integrated IBS (coordination type of control)	Computer integrated adaptive production	Network clusters	High-tech industrial clusters
Horizontally integrated IBS (intelligent control type with elements of self-organization)	Intelligent production	Temporary creative teams	Virtual corporations and clusters

Within the framework of the study, the justification of the structural properties of integrated business structures of the entrepreneurial type is of greatest interest. In our opinion, the process of their formation requires the presence of a developed business environment, which is formed by uniting in strategic alliances a certain general population of individual small and large enterprises/contract factories that work in a certain sector of the economy and pursue common or similar goals, local production systems which in their consolidated mass form a distributed multidimensional production and technological matrix – a cluster. The structural properties of integrated business structures of the entrepreneurial type should be considered as optimal options for the formation of a multidimensional matrix with dynamic links of industrial cooperation between enterprises and nodal connections (Biggadike, 1976). In practical terms, this is done as follows.

Entrepreneurial nodal networks (IBS cells) identify market opportunities or receive orders, look for potential partners within and beyond the established business environment, and conclude appropriate operational agreements, primarily with those business entities with which they have established long-term partnerships relations within the framework of a strategic alliance. The key point in this case is the time of searching, evaluating, selecting, attracting and consolidating business partners into a permanent business network using a specially developed organizational and economic mechanism, visualization tools

and intelligent management support technologies, as well as telecommunications information networks. In order to reduce search time, a number of foreign scientists (www.clairfield.com; Gordon and McCann, 2000), propose to organize as part of long-term integrated entities special, continuously functioning holdings and metaholdings (they may include representatives of large enterprises, subjects of entrepreneurial activity, scientific teams, and invited experts), which should perform the role of a kind of intellectual coordination centers, competence management and goal-setting of joint activities of all participants, respectively (Biggadike, 1976). The operative production top management of the holding consists in: determining the organizational, technical and technological requirements for the business process related to the execution of the order, the involvement of possible executors of the order who possess key competencies (in the form of knowledge, experience, resources and production capabilities); distribution of work and additional resources required for their implementation; in coordinating the actions of the executors and joint control over the progress of the order, with the possible redistribution of tasks between the executors if it is necessary to speed up their execution. At the same time, there is a need to coordinate a large number of territorially distributed partners of participants as part of the IBS in order to balance the available resources. It is obvious that a natural and effective solution to this problem is the use of modern information and communication systems and technologies for the transmission and processing/analysis of operational information to support the process of making group management decisions as part of a single information system of the business environment. The results of the analysis of scientific and methodological approaches to the assessment of structural properties of integrated business structures are shown in table 3.

Comparative analysis of existing and promising scientific and methodological approaches to the assessment of structural properties of integrated business structures is widely presented in the scientific literature, including the works of the authors (Bert, 1981; Biggadike, 1976; Buzzell and Gale, 1987), made it possible to identify four possible approaches to evaluating the structural properties of integrated business structures, the description of which is presented below in the order that reflects the evolution of organizational structures of business management, characteristic of the development of corporate organizations in the 20th century.

We will consider in more detail the structural properties of integrated business structures with centralized, decentralized, coordination and intellectual types of management, which have a certain theoretical and practical significance, as they allow to identify and implement the main trends of

organizational development, including new forms and methods of management in entrepreneurship.

Table 3

**Scientific and methodical approaches to the assessment
of structural properties of integrated business structures
for the development of entrepreneurship**

Structural properties	Approaches to assessing the structural properties of entrepreneurial IBS			Self-organization
	Centralized management	Decentralized management	Coordination	Intelligent management of entrepreneurial IBS
The principle of business process organization	Functional specialization	Subject specialization	Integration	Creative cooperation is based on entrepreneurial initiative
Management structure	High hierarchy	Flat hierarchy	Network adaptation	Self-organization of participating partners (manufacturer, distributor and retailer)
Form of integration	Vertical	Horizontal	Conglomerate	Entrepreneurial IBS
Business model	to the warehouse	to order	to order / project	project
Reaction to changes in the external environment	Inert	Reactive	Adaptive	Proactive
Competitive advantages	Price	Price Quality Time	Time Customer-oriented approach	Customer-oriented approach Uniqueness
Staff motivation	Fulfilling of needs	Career growth	Professional growth	Intellectual development
Development factor	Capital	Qualified staff	Competences	Knowledge, entrepreneurial innovation

The analysis of the practice of using centralized management in IBS shows that they slowly adapt to market changes and respond poorly to customer needs, and the staff of such corporate entities is limited in creative initiative and decision-making, which is necessary for the effective implementation of economic activities in competitive market conditions. Under certain conditions, vertical integration and the corresponding "pyramidal" model of centralized management appear to be more effective and sustainable, as it ensures the programmed behavior of the corporate network based on end-to-end planning.

With decentralized management, instead of vertical administration based on a set of functions and departments, small conditionally autonomous units are created, specializing in the performance of several objectively completed

fragmentary tasks as part of the overall business process. With such a management organization, the decision-making process moves to the lower level to the heads of business structures of the entrepreneurial type, closely related to the direct executors of work and specific production issues, and all coordination processes are carried out due to the local interaction of the participants of the horizontally integrated business structure. The governing body reserves the functions of organization, goal definition and general control over the implementation of business activities. This model is successfully applied in the conditions of a relatively stable competitive market of final products, which requires prompt and purposeful appropriate response of the corporate network to consumer requests. However, the decentralization of management requires the adoption of certain organizational and economic measures, including those of a costly nature, related to the retraining of managers, overcoming resistance and stereotypes of work in centralized corporate structures; by changing the accounting and reporting system. It should also be taken into account that the effectiveness of the application of a flat organizational structure of management decreases with the increase in scale and complexity of technological processes and, accordingly, chains of cooperation in integrated production. Distributed corporate networks of production cooperation have structural properties of inertia, because with the growth of the number of consolidated links of the technological network, uncontrolled dynamics of their spatio-temporal interaction arise.

The structural properties of coordination management are manifested in the associated form of management organization of various associations of heterogeneous business entities (autonomous unions/alliances, diversified conglomerates, long-term networks of industrial cooperation and entrepreneurial horizontally integrated corporate structures), consolidated into a single business process using mutual ownership of shares and the use of unified information and communication systems to coordinate the management of joint activities. The main advantage of multidimensional associative forms of business organization is related to the possibility of quickly attracting and using the resources, knowledge and professional competences of the participants of the value chain that are most suitable for the fulfillment of a specific order. This approach makes it possible to successfully use this form of organization and management in various sectors of the economy. This management model involves the voluntary active behavior of participants in the value creation chain and the development of a general coordination center as part of the governing body of a horizontally integrated corporation, which directly regulates the multidimensional production and technological network by non-directive formal methods using information technologies and telecommunications.

Many scientists in the field of organizational management and development suggest a transition to the informal construction and self-organization management of multidimensional integrated business structures with proactive behavior that corresponds to modern trends in the development of integrated organizations, namely, the reduction of management levels and the total number of middle and lower managers on the basis of broad involvement direct executors of work in solving scientific and industrial tasks using intellectual methods and management tools (Buzzell and Gale, 1987).

The intellectual management of entrepreneurial IBS, first of all, manifests itself through the improvement of the efficiency of the activities of small and medium-sized business entities of the participants' partners who possess the necessary competencies and the available innovative potential, through their integration at the national and international level into the target corporate business structures – clusters – with the aim of producing a competitive.

Research Findings and Prospects. It should be noted that a fundamentally new object appears within the framework of intelligent management – a complex set of multidimensional cluster interactions in a spatial and temporal relation, which requires fine regulation and, accordingly, new approaches to the organization of management. This is due, first of all, to the fact that the role of participants in integration relations is distributed according to the business processes of supply, production and sale. It is quite obvious that the principles of formal unification and coordination of activities used by modern corporations/holdings of the adaptive type are not suitable for the organization of their successful work, since these integrated structures are the result of self-organization of innovative activity participants into entrepreneurial network structures.

Unlike IBS, managed with the help of formal orders of the administration and the establishment of work rules, these intelligent integrated business structures are independently formed under the influence of such factors as the motivation of cluster participants to obtain an additional synergistic effect from business cooperation and management of their self-organization and interaction processes. The main components of the effect are: high rates of commercialization of innovative developments, large-scale output of competitive products on the national market, favorable conditions for attracting investments, high rates of development of competencies of innovative leaders.

As a result of business integration (production cooperation, merger and/or takeover), open integrated business units (creative companies, virtual holdings, clusters, etc.) are created, which in most cases do not take the form of diversified conglomerates typical of the current market situation, and represent permanently forming virtual production and technological chains that unite territorially or administratively separated scientific, production, financial and other business processes into certain clusters.

REFERENCES:

- Hanushchak-Iefimenko, L. M. (2014). Innovatsiyni rozvytok pidpriemnytstva v Ukraini: stratehichni oriientyry: monohrafiia [Innovative development of entrepreneurship in Ukraine: strategic orientations: monograph]. Kyiv: National Academy of Management. 400 p. [in Ukrainian].
- Hanushchak-Iefimenko, L. M. (2012). Intehrovani struktury biznesu ta yikh rol v ekonomikakh krain svituU [Integrated business structures and their role in world economies]. RL: <https://dspace.nuft.edu.ua/jspui/bitstream/123456789/2883/3/5873.pdf>. [in Ukrainian].
- Bentler, P. M. (1990). Comparative fit indexes in structural models. *Psychological Bulletin*, 107: 238–246.
- Bert, E. (1981). The Web of Corporate Capital. Overview. *Political Affairs*, Vol. 60.
- Biggadike, F. R. (1976). Corporate Diversification Entry Strategy and Performance. Cambridge MA: Harvard University Press.
- Buzzell, R. D., Gale, B. T. (1987). The PIMS Principles: Linking Strategy to Performance. The Free Press, a division of Macmillan Inc. URL: <http://web.ebscohost.com/bsi/>
- Bylok, F., Pabian, A., Kuceba, R. (2016). Management of a cluster as a network for cooperation between SMEs in Poland. *Small Enterprise Research*, 23(2): 172–181. DOI: 10.1080/13215906.2016.1221357.
- Gibson, M. S. (2002). Is Corporate Governance Ineffective in Emerging Markets? *Finance and Economics Discussion Series*, June 2002, № 1999–63.
- Global Mid-Market M&A Review. URL: <http://www.clairfield.com/wp-content/uploads/Refinitiv-Global-Midmarket-MA-Review-2020-CLAIRFIELD.pdf>.
- Gordon, I. R., McCann, P. (2000). Industrial clusters: Complexes, agglomeration and/or social networks? *Urban Stud*, 37: 513–532.
- Grechyshkin, Yu. (2021). Conceptual bases of formation of potential management system of integrated structures. *European science*, 1: 76–79. URL: <https://european-science.sk/storage/journals/essays/1-2021/405.pdf>.

AUTHOR (S) BIOSKETCHES



Rębilas Rafał, PhD, Vice-Rector for International Relations, WSB University (Akademia WSB), Dabrowa Gornicza, Poland.

<http://orcid.org/0000-0001-7926-1155>

E-mail: rrebilas@wsb.edu.pl

COPYRIGHTS

©2023 The author(s). This is an open access article distributed under the terms of the Creative Commons Attribution (CC BY 4.0), which permits unrestricted use, distribution, and reproduction in any medium, as long as the original authors and source are cited. No permission is required from the authors or the publishers.

HOW TO CITE THIS ARTICLE

Rębilas, R. (2023). Methodical approaches to the assessment of structural properties of integrated business structures. *Management*, 2(38): 180–190. <https://doi.org/10.30857/2415-3206.2023.2.15>.