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## **ECONOMICS**

### **THE PROSPECTS OF DEEP GRAIN PROCESSING OF GRAIN PROCESSING ENTERPRISES WITH MARKETING CONCEPT**

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**Annotation.** *The preconditions of the development of deep grain processing technologies in Ukraine are investigated in the article. Some problematic circumstances of the introduction of technologies of grain deep processing are presented. The necessity of use of socio-ethical marketing is determined. A systematic exposition of the methods to current problems within the concept of socio-ethical marketing is presented.*

**Keywords:** *grain deep processing, grain processing enterprises, socio-ethical marketing, biofuel, globalization.*

**Introduction.** There are about 970 wheat processing enterprises in Ukraine. In 2014, only 187 among them produced more than 1000 tons of flour, including 97 mills which converted 5000 and more tons of flour. As a result, the volume of production of this product amounted to about 2.04 million tons. In general, over the past six years, flour production in Ukraine remains quite stable, except for the 2011/12 marketing year, when the flour milling business experienced a significant drop due to high grain prices, low demand and strong competition in the world markets (Ukrainian grain Association, 2014).

Stable decrease in consumption in the country still stimulated the growth of export supplies of Ukrainian flour. By 2006, flour exports did not exceed 15 thousand tons per year, and the increase in supplies began only in 2008, which was due to dry summer in some importing countries. In the 2007/08 marketing season, Ukraine exported 222 thousands tons of flour, which was record for the country. In subsequent periods, the export of these products stabilized and was until the last period of time at the level of 100 thousand tons of flour per year. If we talk about the marketing season 2015/16, it turned out to be really record-breaking for Ukraine, because it has exported 344 thousand tons of flour during this period. Thus, the country received revenue equal to the 80 million US dollars. However, against the backdrop of the world leader, Turkey, whose exports in the current marketing year is amounted to 4960 thousand tons of flour, these economic indicators are quite modest for Ukraine (Agro Media Holding “LatifundistMedia”, 2017).

Therefore, it should be noted that for significant progress of the domestic grain processing industry it is important to touch on a broader topic concerned with the improvement of the existing mills and grain processing enterprises as a whole.

**The empirical material of the study.** Among the three possible directions for increasing the grain market, such as food and feed, exports and processing, only the latter direction has the potential for significant growth. Export has objective limitations on the rates of development, conditioned by the logistics of transportation and competition in the world grain market. Subsidizing the transportation tariff for exporting grain can be assessed as a prospect. On the one hand, such a decision is tactically correct, however, in the strategic perspective, export subsidies will not solve the main problem associated with overstocking the world grain market and, as a consequence, low world prices.

Moreover, it will be necessary to try to win the increased share of the market in connection with the dumping of grain by the significant reduction in prices, which, naturally, will not be approved either by the participants on the world market or on the related Ukrainian domestic market.

It is known that 30-40 years ago in the USA and Europe it was possible to seriously regulate the grain markets of the countries due to the massive development of deep processing of grain, with the production of gluten and syrups. Deep processing of grains has allowed to expand the domestic food market of these countries, where up to today, for example, about 40 % of sugar demand is satisfied with glucose-fructose syrups only. In the context of our study we identified that 10-15 years ago, grain processing enterprises in these countries received a second breath (See Figure 1) by launching new biofuel production programs, aimed at the production of biofuel from corn, wheat, and rapeseed, which allowed the US and Europe to create biofuel markets for effective solution of the existing agricultural problems (Potapov, S., 2010).

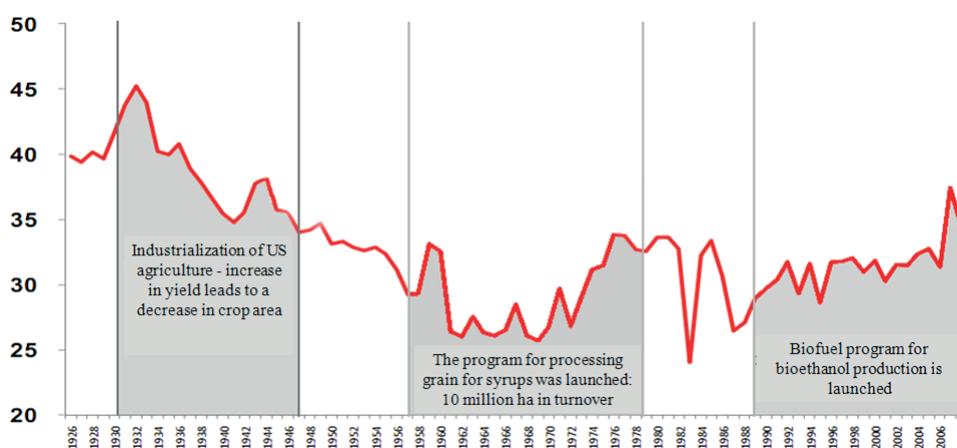


Figure 1. Corn fields in the USA in 1926-2008, mln ha  
Source Data: Official website of FAOSTAT.

Therefore, it is extremely relevant to analyze modern, advertised and agribusiness-related investment projects in which the expected positive effect, in the long-term period, can counterbalance the negative effect in the short-term period. These projects,

related to the activities of grain processing enterprises not only affect the main tasks of agromarketing, but also include innovative projects for deep grain processing (Potapov, S., 2010, Tarkhanov, O., 2012).

It is entirely obvious that the issues of improving grain processing technologies mainly arise in two cases: either the task is to increase economic efficiency and reduce the danger of the existing technology for the environment, or there is a need to process the produced grain, the amount of which exceeds domestic needs and can be sold in some markets outside the state (Tarkhanov, O., 2012). According to official statistics, in 2016 a record grain volume of 40.2 million tons (which in value terms is about 6.1 billion US dollars) was exported to foreign markets (Agro Media Holding “LatifundistMedia”). It seems important to pay attention to the fact that deep processing of grain, for example, into fodder crystalline lysine, yields 8-10 times more profit than simple grain sales (Potapov, S., 2010).

The essence of deep processing of grain is the separation of grain into components, each of which has a high consumer value and can be used in various industries. Factories of deep grain processing produce protein, carbohydrate, vitamin, microelement, amino acid ingredients for the production of balanced mixed fodders, promote efficient and intensive livestock breeding. Products of deep processing of grain are also: gluten, vegetable protein, starch, glucose, molasses, organic acids, which are actively used in the food industry. There are other products of deep grain processing, which are in demand not only in the food and feed industry, but also in the textile, pharmaceutical, chemical, microbiological industries and other industries.

According to the “Gluten market analysis in the CIS countries” prepared by BusinesStat in 2016, over the past five years, sales of wheat gluten (gluten) in the CIS countries increased by 76 %, that is from 12.3 thousand tons in 2011 to 21,7 thousand tons in 2015. The growth in sales was due to increased consumption of products, as well as low market saturation. It is assumed that in 2016-2020 the sales of wheat gluten in the CIS countries will continue to increase slowly. Exports will be the main direction of sales in this period (The DairyNews, 2016).

Wheat gluten is gaining popularity in the food industry, especially given the relatively low proportion of high-quality food grains. The flour milling industry makes extensive use of flour improvers, and gluten is the most common of these. In addition to bakers and millers, gluten producers are actively used by producers of mixed fodders, meat products and semi-finished products.

The development of deep grain processing in Ukraine will make it possible to produce high-tech products, the demand for which on the world market is growing every year. Consequently, the emergence of this industry in the nearest future can be both an instrument for attracting investment and a source of income. Further deepening of processing towards the production of biotechnological products with high added value will solve the problem with the sales markets: in Ukraine there is a special demand for amino acids and fodder, in Europe there are growing demands for ecological bioplastics, and Asian markets are interested in biochemistry products such as biobutanol.

Nevertheless, special attention in the period of a significant rise in price of energy resources (gasoline, gas, etc.) in the world received a direction for deep processing of grain for bioethanol fuel. For Ukraine, which, on the one hand, is 55 % dependent on imported fuel, and on the other hand does not fully use the potential of its agriculture, biomass-based energy production could become a viable alternative that would not only overcome excessive dependence on imported energy resources, but also to bring Ukraine closer to European standards and contribute to climate change prevention (Maxrise Consulting, 2016).

Most countries of the world recognized the strategic importance of the development of the biofuel industry and declared it legally. In 1975, Brazil adopted the Ethanol National Program to stimulate the use of bioethanol, as a substitute for traditional gasoline. On May 2003, the EU Biofuels Directive was approved, according to which the member countries of the Commonwealth undertake to produce and use biodiesel, and by 2020 the EU countries plan to fuel at least 20 % of the transport with biofuel. The U.S. government actively supports the production of biofuel, in particular, in August 2005, the U.S. Energy Bill and the U.S. Renewable Fuels Standard were adopted.

According to the Decree of the Cabinet of Ministers of Ukraine of February 22, 2008, one of the priority directions of the activity of the Ministry of Agrarian Policy and Food of Ukraine is concerned with coordination of development of alternative types of fuel to replace traditional types of energy carriers. In Ukraine, the most promising in the production of biofuel is the cultivation of the following types of energy crops: for the production of bioethanol – cereals, in particular corn and sugar beets; in production of biodiesel fuel – seeds of oilseeds, in particular rapeseed, sunflower, soybeans (The Verkhovna Rada Of Ukraine, 2008).

However, further development of bioethanol production with the use of cereals is being hampered for a number of reasons. Grain is used in the production of the so-called first-generation biofuel. Biofuel of the first generation is usually called ethanol, produced from crops rich in sugar (sugar beet, sugar cane, sorghum) and starch (corn, wheat, cassava), as well as biodiesel from oilseeds (soybean, sunflower, rape, palm) or animal fats, and also with pure vegetable oil. In most cases, these types of raw materials can also be used as food and feed. According to the worldwide estimate, 2.8 tons of wheat are needed for the production of 952 liters of ethanol, and 5 tons of corn for the production of 2000 liters of ethanol.

The situation with biofuel derived from agricultural crops (conventional biofuels) is rather tragic: if in 1997 investments in this sector were above 25 billion US dollars per year, then by 2015 investments in this direction ceased to grow. Among the main reasons for this phenomenon, in the first place, there is a wide range of restrictions at the political level that provide for the reduction of greenhouse gas emissions during production and mandatory international certification of biofuels for entering the world market. For agriculture, these are the standards of SAN/RA i GlobalGAP RTRS, RSPO and Bonsucro. Despite the fact that certification schemes are constantly expanding, this creates potential risks for the investor, limiting the export potential of products.

**Constructive research material, which forms the scientific novelty of the study.**

The complexity of the ethical problem of deep grain processing for non-food products against the backdrop of trends in social processes requires more attention when organizing an effective agro-marketing system for grain processing enterprises. In this context, it should be noted that in the early 60s of the XX century in the world there was a real surge of social activity. At this time, various social movements for the rights of youth, women, national minorities and the protection of the environment arise and develop. M. Meskon, M. Albert, F. Hedouri in their scientific research note that “the disputes about the role of business in society pushed the course of events in the 60s and 70s of the XX century”. In various spheres of society, active interest was shown in such issues as civil rights, the Vietnam War, the equality of women, environmental pollution by industrial waste, the state of the environment as a whole and consumerism as an organized movement of consumers that strives for more buyer power in relation to sellers. In the 70s and 80s of the XX century, such important issues as disarmament, nuclear energy, getting rid of third world countries, protecting flora and fauna, as well as trade and economic relations with South Africa, came to the forefront” (Bogyuk, S., 2012).

Therefore, since the 70s of the XX century, an organization that, apart from its obligations to clients, partners, employees, is also responsible to society as a whole, is rightly considered to be ethical. In this regard, the problem of developing theoretical and methodological foundations, as well as the creation of methodological and organizational support based on the social and ethical principles of marketing as a basis for improving the economic activity of grain processing enterprises in the new conditions of globalization of the economy, becomes extremely urgent.

F. Kotler laid out the most complete concept of socio-ethical marketing in the book entitled as “Fundamentals of Marketing”: the company must determine the needs, demands and interests of the target markets, and then provide a higher consumer value, effective in comparison with competitors, in ways that maintain or improve well-being, both the client and the society as a whole (Kotler, F., 1992).

The introduction of the socio-ethical concept of marketing, as an economic tool to improve the efficiency of the economy of grain processing enterprises, requires a socio-economic justification for its appropriateness. The regularity that the economic indicators of business directly correlate with the socio-ethical indicators of its functioning was revealed during the research. Moreover, there is an inverse relationship: achievements in the social, moral and ethical spheres of the society contribute to an increase in the corresponding level of financial results.

The key directions of the action of socio-ethical marketing are shown in Figure 2. Due to the complexity and variety of social ties, the rules and order of their establishment in the business environment, as well as the multidimensionality of the social and ethical problems that arise in the process of implementing this concept during restructuring, it is possible to single out several independent trends in socio-ethical marketing: marketing of interactions, socially responsible marketing, ethics of marketing and business culture (Korotkova, T., 2007).



Figure 2. The key directions of the action of socio-ethical marketing

Marketing of interactions is aimed at implementing processes related to the creation, support and expansion of strong relationships with consumers and other partners of an enterprise. Entrepreneurial activity should be based on compliance with business interrelations, faith in the trade business, respect for the professionalism and competence of business partners.

The opportunity to avoid competition with food and feed is one of the main problems in the development of programs for deep processing of grain into ethanol. The way to ensure ethical biofuel business through the protection of the food market with the use of the development of the direction of marketing of interactions we tried to suggest in Figure 3.

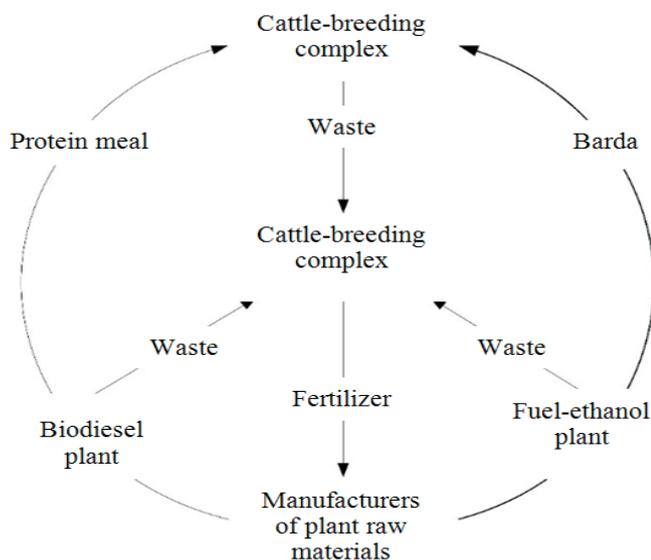


Figure 3. Integration of the biofuel industry into the agro-industrial complex

In the production of biofuels, a huge amount of waste is generated, which are suitable as feed for livestock. Thus, G. Cooper and J.A. Weber believe that such a use can compensate to a certain extent the increase in feed costs caused by the increase in demand due to the development of biofuel production. Some of the by-products are especially rich in protein components, they can be a cheaper substitute for other protein-rich feeds, especially in some regions, for example in Europe.

Such direction of the action of socio-ethical marketing as marketing of interactions has a decisive influence on the organization of relations with the external environment of an enterprise. Therefore, in our opinion, the most optimal way to create a food-safe biofuel industry is directly related to the benefits of integrating the disparate production capacities of the agro-industrial complex into powerful agro-technological biofuel clusters within the marketing policy of grain processing enterprises that carry out deep grain processing.

In addition to bringing land into circulation, such structures raise the prestige and attractiveness of rural labor, and targeted purchase of fuel for the needs of the state solves the issue of supporting agrarians in the conditions of the WTO. The biofuel industry must be properly integrated into the economy of the agro-industrial complex, in this case the pressure on the food market will be minimized, since in fact the main wastes of this technological cycle are meat products. The key functional load will be concentrated on grain processing enterprises, which turn agricultural raw materials (grain) into main products, such as bioethanol, and by-products or protein-protein feed for animals.

Socio-ethical and economic obligations of grain processing enterprises should be considered in the paradigm of four levels of responsibility (See Figure 4).

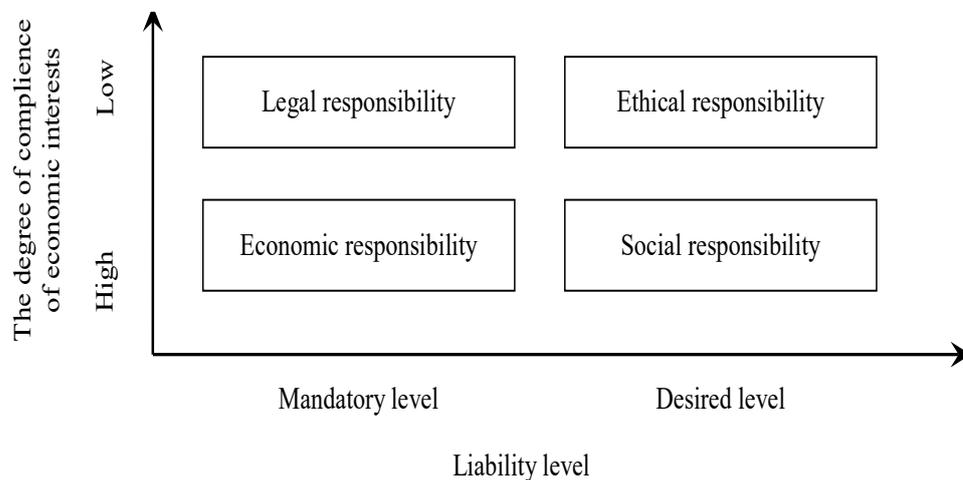


Figure. 4. The main levels of responsibility in business development

In general there are several approaches to the interpretation of business responsibility: the traditional approach (the most famous representative is M. Friedman), ethical approach (P. Drucker) and socio-ethical approach (K. Lewin, E. Schein, H. Mintzberg). Obviously, it should be emphasized that realization of the social responsibility of business is possible on the basis of a deeper study of the social and ethical problems of Ukrainian society.

The level of economic responsibility refers to the basic mandatory responsibility and is to make profit, that is, to fulfill the basic purpose of the business. The indicators of profitability of deep processing of grain for bioethanol largely depend on the current oil prices in the country: the higher they are, the higher will be the profitability from the production of biofuel. For example, in Europe, with fairly high prices for traditional energy resources, this indicator reaches 30-35%. The leading ways to improve profitability include the organization of own production of raw materials and the development of production of “co-products”, for example, feed for farm animals, and their subsequent sale.

The rise in oil prices is the most important factor in improving the competitiveness of alternative fuels, including biofuels. According to Merrill Lynch, the cessation of biofuel production will lead to an increase in prices for oil and gasoline by 15 %.

The cost of biofuels is largely determined by the cost of raw materials for its production: about 37 % is bioethanol from sugarcane in Brazil, 40 % is corn in the USA, and 34 % is sugar beet in the EU. The increase in prices for these products has led to a decrease in the competitiveness of biofuels. Therefore, in this case, grain processing enterprises are important intermediaries that can influence both the energy market and the agricultural raw materials market by regulating the profitability of other sectors of the economy.

Legal responsibility is also mandatory. The animal husbandry sector is one of the possible consumers of grain processing enterprises. In the present-day context the main strategic priority of the animal husbandry sector is the development of organic animal husbandry. Organic animal husbandry in the European Union is based on the standards of organic (ecological) animal husbandry, which were adopted on 24 August 1999 by the EU regulation 1804/99/EU. This decree prescribes the rules of production processes, which must be observed if the manufactured product is considered to be a bio-product. Today there are various problems of the transition from traditional to organic animal husbandry, so strict adherence to the established rules of the EU Regulation is the key to overcome these difficulties.

In organic animal husbandry, certain methods of breeding animals, as well as some fodder and fodder additives allowed in conventional animal husbandry, have proved to be unjustified. Consequently, the production of feed, as a by-product of deep grain processing, can not be used for organic animal husbandry, but without restrictions can be used in the traditional fattening of farm animals.

Focusing on the consumer with the needs for organic feed requires adhering to the standards and rules that apply to organic animal husbandry.

The level of ethical responsibility lies in the observance of the moral foundations of society and the company itself and is considered as possible: it is not the subject to strict formal regulation. The flagships of socially responsible business, of course, are Swedish companies.

Strict legislation in the field of environmental protection, combined with a high level of awareness and understanding of environmental issues, has guided Swedish companies to the path of innovative and effective solutions to the challenges of preserving the environment in their activities. Production technologies that do not harm the environment, especially in the field of industrial production, are often now the subject of Swedish exports.

Swedish companies also occupy the leading positions in the world in the field of clean and clean-up technologies, which are known under the name of “clintek”. The term “clintek” refers to products and services that, while improving performance, productivity and efficiency, at the same time contribute to reducing costs, raw materials consumption, energy consumption, waste and polluting emissions. The introduction of such technologies also contributes to the strengthening of competitiveness and growth of the Swedish industry (Official website of Swedish Institute, 2017).

This level of responsibility requires a visual presentation of the non-economic benefits of deep grain processing. The production of fuel ethanol is very energy efficient. Wherever possible, energy is restored and used in further production processes. Current parameters of energy use (dry grinding, corn): electricity – 0.30 kWh per liter of ethanol; energy – 10.0 MJ per liter of ethanol; water – 3 liters per liter of ethanol (Official website of Cleandex, 2015).

Another goal pursued by biofuel production is the reduction of greenhouse gas emissions. Numerous studies have been published in the world concerning the calculation of the potential of various biofuels production processes to reduce greenhouse gas emissions compared to fossil fuel use based on Life Cycle Analysis Methods (LCA).

Various technological processes involve the use of various combinations of raw materials, conversion, operating technologies, and the type and nature of further processing of the by-product.

According to the study (Biofuels and food security, 2013), the reduction of greenhouse gas emissions from biofuels from cereals as compared to gasoline and diesel fuel, without taking into account changes in the nature of land use, ranges from -20 to 55% in corn ethanol and from -5 to 90% in wheat ethanol production.

The U.S. Energy Independence and Security Act of 2007 introduced the concept of biofuels, with a predominance of greenhouse gas emissions of 50 % for the overall life cycle. Moreover, the EU Fuel Quality Directive introduces a greenhouse gas saving threshold of 60 % from 2018 after taking into account all the effects of direct land use change.

Social responsibility is defined as promoting welfare and improving the quality of life of society. This is the desired level of responsibility that justifies the social existence of the organization.

Many authors believe that biofuel opens up new significant opportunities for creating sources of income and new jobs, as well as for attracting much needed capital for the sustainable development of agriculture, new technologies and knowledge. Other analysts point to the negative consequences of the development of the biofuel industry for low-income farmers and their communities, which manifest themselves both directly in the form of land expropriation, and indirectly, when available resources are concentrated for the needs of large-scale agriculture (Biofuels and food security, 2013).

On the basis of the above-mentioned considerations we have assumed that developing countries have not yet formed their biofuel policies, many investment programs and projects are still at different stages of implementation. In this regard, it is still difficult to accurately assess their implications from a temporary perspective and at the macroeconomic and regional level.

**Conclusions.** Thus, we consider it expedient to emphasize that the main shortcoming of the existing marketing concepts is the ignoring of the socio-ethical aspects of the establishment and functioning of market relations in the new conditions of the economy globalization. In this regard, an extended model of social and ethical marketing can be proposed, which takes into account, first of all, the positive impact of basic social and ethical principles on business as a whole. This model is based on the socio-ethical mission of business, as well as the principles of its implementation in the real sector of the economy.

**The scientific novelty of the obtained results** is a systematic presentation of specific solutions aimed at optimizing the problematic aspects of the introduction of innovative technologies for deep grain processing within the framework of the current concept of socio-ethical marketing. In this case, the socio-ethical marketing of a grain processing enterprise acts as a synchronizer of the processes of the market environment (identifying the demand for new products of deep grain processing), the internal system of the enterprise (increasing productivity through the use of the useful qualities of by-products) and society (assessing the utility of new ways of obtaining energy products).

**The specific theoretical significance lies** in the study of the objective prerequisites for increasing the competitiveness of grain processing enterprises in the context of the globalization of the world market. It is established that an increase in the competitiveness of grain processing enterprises is possible through a change in the typical commodity orientation of Ukraine, and the deep processing industry is a necessary market regulator for optimization of marketing processes.

**Practical value consists in** systematization of the basic problems interfering active development of new technologies of deep grain processing of the grain processing enterprises and implementation of actions of the socio-ethical marketing system for the prevention of their occurrence.

**Approbation** of the proposed concept of socio-ethical marketing of grain processing enterprises in the context of globalization with the use of the technologies of deep grain processing was carried out in the framework of scientific and practical conferences.

According to the results of the discussions, it is established that the promising

direction of socio-ethical marketing in the given concept is also the use of the possibilities of marketing technologies influence on the cultural state of the society through propaganda measures from the transformation of alcohol (alcoholic alcohol) into alcohol fuel (bioethanol).

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## THEORETICAL FUNDAMENTALS OF THE DEVELOPMENT OF THE ENTERPRISE ANTI-CRISIS PROGRAM

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**Annotation.** *The article deals with the essence and process of the crisis management of the enterprise, methods and forms of its implementation. The directions of the enterprise operation in the framework of the anti-crisis program and mechanisms of the crisis management implementation are outlined.*

**Keywords:** *anti-crisis management, anti-crisis program, crisis, financial position, screening standard.*

**Introduction.** The most important goal of the anti-crisis program is sustainability of the enterprise operations, which manifests itself not only in achieving the required indicators of solvency and profitability, but also in maintaining their level, which prevents a recurrence of the crisis.

The actual result of the implementation of the enterprise anti-crisis program is the establishment of the process of regular management. For the manager, this means the ability to predict the situation, monitor and influence the current operation at the time it is needed. The basis of regular management at the enterprise is planning, which includes constant monitoring and adjustment of plans. At the same time, the planning process itself can be both complex and multilateral (which usually occurs at large enterprises, which inherited elements of the organization from the former times), and limited to a set of several basic elements.

When developing and implementing anti-crisis programs, it is important to pay attention to improving their efficiency, that is, better use of the allocated resources.

The process of financial recovery should not be chaotic and unstructured; it should be properly organized and coordinated.

**The main research findings.** Anti-crisis program should be expanded and developed for the whole enterprise. If necessary, there can be developed anti-crisis subprograms for separate units and functional services of the enterprise (such as development, clarification of measures envisaged at the enterprise level).

The anti-crisis program is developed on the basis of the diagnosis of the financial position and the threat of bankruptcy of the enterprise, the consequences of the occurrence of a bankruptcy situation, the assessment of the enterprise capabilities regarding the localization of the crisis, its place in the overall process of the crisis management.

The development of an anti-crisis program is one of the crucial issues, since a well-founded choice of anti-crisis measures ensures the financial recovery with the least losses in the shortest possible time.

Theoretical issues and methodological aspects of determining the content of the

anti-crisis program, that is, an optimal list of anti-crisis measures and the sequence of their implementation, belong to the least developed. Typically, a certain set of anti-crisis measures are proposed in accordance with the depth of the current crisis and the stage of financial stabilization (methods of operational, tactical, strategic mechanisms). Operational, long-term financial and long-term investment methods are applied in succession. If the required result is not obtained, methods of rehabilitation are grouped depending on the quantitative indicators of the threat of bankruptcy, etc. There is no definite point of view on the sequence of application of certain anti-crisis procedures, and the optimal norm of the ratio between them, moreover the methodological tools of each stage of the anti-crisis transformation are formed empirically without proper justification of the appropriateness of these measures.

In foreign studies, E. Brigham, professor of the London Business School in particular [1, p. 39], on the basis of a detailed study of the practice of transformation of companies, emphasizes the need for individual selection of anti-crisis procedures depending on the causes of the crisis; the degree of its complexity; relations with physical and legal entities, organizations and groups of organizations that are interested in the development of this enterprise and capable of influencing this development; historical heritage; industry features; structure of the enterprise expenses, etc.

Thus, the anti-crisis program of the enterprise should be considered as documenting of the decision taken regarding the ways and means of the enterprise financial recovery, and scientifically substantiated requirements (principles) of its development should be based on scientific developments and tools of decision-making theory.

It is necessary to highlight the structural and logical scheme of the process of forming the enterprise crisis program. Development of the enterprise crisis program is a managed process in which separate stages of work are singled out.

At the stage of forming the working group, it is necessary to identify several stakeholders who will be responsible for the process of developing and implementing the anti-crisis program, or contact a consulting agency for help. The consultant is presenting the view from the outside, and is rather free in the estimates: the priorities of saving business, directions of the business activities, market, suppliers, etc.

At the second stage it is necessary to develop a calendar network plan that determines the structure of the functional complexes of works, the timing and peculiarities of their implementation. Different calendar network plans are used, such as Gantt charts, schedules, network graphs (Program Evaluation and Review Technique (PERT) and critical path method).

The schedule diagram of the project reflects the main obligations, agreed with the customer, regarding the content, terms and main stages of the project implementation. In form it is a linear graph that does not reflect technological links. The execution of this schedule is controlled, as a rule, by the head of the enterprise. The volume of work, information and indicators in this graph is not significant [2, p. 15-17].

At the third stage, the enterprise needs to conduct in-depth analysis of financial and economic activity, its assets and liabilities, receivables and payables, availability of the

equity capital, existing and possible orders, demand and prices for products and services. This helps to identify the causes of the crisis situation, outline ways to overcome it, as well as identify the causes of the current state and needs that hinder further development. It is also advisable to undertake the enterprise valuation using the cost of income, which is calculated by the formula:

$$\text{where Pent} = \frac{P_r \times (1 - \text{fpt}) - L_s}{DR + 100} \pm A_{\text{pfa}} \pm A_{\text{pnca}} \pm A_{\text{pwc}} \pm A_{\text{std}} \pm A_{\text{std}}.$$

where Pent – the price of the enterprise, thousand UAH;

Pr – profit for the period, thousand UAH;

fpt – profit tax, share of profit;

Ls – losses for the period, thousand UAH;

DR – discount rate, %;

Apfa – adjustment for procurement with fixed assets, taking into account their depreciation, thousand UAH;

Apnca – adjustment for provision of other non-current assets, thousand UAH;

Apwc – adjustment for provision of working capital, thousand UAH;

Astd – adjustment for short-term debt, thousand UAH;

Altd – adjustment for long-term debt, thousand UAH.

The analysis, supplemented by forecasting the prospect, also helps to determine the structure, volumes and sources of resources needed to eliminate the loss-making. To get more detailed data on the resource needs of the program and sources of their satisfaction, it is necessary to introduce measures that lead to the achievement of the goals [2, p. 18].

At the fourth stage, it is important to develop anti-crisis alternatives, that is, a set of possible measures of the anti-crisis program, hypotheses regarding the development of the internal and external environment, forecasting possible consequences of their implementation. The uniqueness and non-standard nature of the anti-crisis program is due to the fact that there is a rather wide range of alternatives that represent a complex object of evaluation. Decision-making takes place under conditions of information uncertainty and high riskiness, the consequences of the implementation of separate decisions, the growing dynamism of the enterprise environment, increasing interconnectedness of individual activities.

The purpose of the screening (prior) analysis is to reduce the plurality of proposed alternatives, taking into account a certain system of screening standards, which makes it possible to form a set of admissible alternatives.

The screening standard refers to a certain list of, as a rule, qualitative conditions and limitations, the discrepancy in which makes it inappropriate for further consideration and in-depth development of the expressed anti-crisis idea. In essence, the screening standard serves as a level of satisfaction. It is used to localize the set of anti-crisis

decisions, which helps to focus on the most important measures that are adequate to the specific conditions of the enterprise [3, p. 109].

Compliance with the economic interests and strategic objectives of the enterprise – the application of this screening standard requires clarification: in the interests of which social groups the anti-crisis program is being developed. Focusing on the interests of the owners of an insolvent enterprise implies that a financial plan to exit insolvency should take into account the interest of owners in preserving the existing distribution of ownership and control over the enterprise, as well as their general orientation towards the future of the enterprise (continuation or liquidation). The economic interests of the administrative apparatus of the enterprise consist in maintaining the independence of making and implementing managerial decisions, real control over the economic life of the enterprise. Taking into account the economic interests of the employees of the enterprise requires orientation on the preservation of jobs, stable payment of wages and its growth [1, p. 18].

Compliance with resource provision and possibility of practical implementation – this screening standard determines targeting at the measures that are feasible, taking into account available material, labor, informational and financial resources.

Performing screening analysis – at this stage, individual alternatives are compared with the criteria (screening standards) which they must comply with. The anti-crisis measures that do not meet at least one screening standard are excluded from further consideration [4, p. 35].

Depending on the competence of experts and involved specialists, the number of alternatives proposed, tolerance to the strain of the screening analysis may involve the use of one of two possible methods of reduction:

- a step-by-step comparison of each aspect (characteristic) of the proposed alternatives with certain criteria; the alternative that does not meet a specific criterion is immediately rejected;

- comprehensive evaluation of each alternative according to all stated screening standards, with subsequent rejection of alternatives that do not conform to the defined standards and the permissible level of strain (i.e., non-compliance with standards recognized as admissible in the absence of other proposals) [5, p. 115-116].

At the same time, when choosing anti-crisis measures, there is a problem finding the most appropriate solutions taking into account heterogeneous consequences of separate anti-crisis measures that cannot be reduced to a single indicator. Consequently, it is a multicriteria choice of alternatives.

At the fifth stage, it is necessary to discuss and agree on an anti-crisis program with the owners of the enterprise, since separate measures to restore solvency may affect their interests, not correspond to the strategic vision of the prospects of the enterprise development. The internal structure of the anti-crisis program does not require formalization (clear and unambiguous definition of individual sections), as it will be determined by the stage of the crisis and the nature of the activities included.

At the sixth stage it is necessary to prepare an expert opinion with a full description of

each proposed anti-crisis measure for the decision-maker. The developed methodological techniques should be clear; the less they are formalized, the more likely they will actually be practiced. Approaches to justify a decision should not be labor-intensive, that is, they should not require much intellectual effort. They should provide a more reasoned result than decision-making techniques based solely on logic and intuition.

An in-depth study and expert evaluation of each anti-crisis measure of an acceptable set of alternatives is carried out and a final list of rational anti-crisis measures is suggested, which are recommended for inclusion into the program:

- strategic goals of the enterprise owners for the implementation of financial rehabilitation (focus on prolongation of activity or liquidation of the business entity);
- personal interests and ambitions in terms of saving control over the operation of the enterprise;
- target quantitative parameters of the anti-crisis process to be achieved;
- time limits of the anti-crisis process;
- resource capabilities (the possibility of attracting additional material, labor and financial resources, budget funds for the implementation of the anti-crisis program).

At the seventh stage, the procedure for choosing rational alternatives and preparation of a draft anti-crisis program is made.

At the eighth stage, it is important to harmonize the anti-crisis program with stakeholders - creditors, owners, public administration and control bodies, etc. (in accordance with the regulatory requirements and the status of the enterprise.) From the point of view of the enterprise owners, the criterion of the advantage in choosing rational alternatives from the set of permissible alternatives are losses, which arise as a result of implementation of certain anti-crisis measures.

Under the losses of the owners from the implementation of certain anti-crisis decisions, it is proposed to understand the total assessment of the following types of costs:

- direct economic losses in the form of additional expenditures of financial resources, which must be carried out during the preparation and implementation of the anti-crisis measure;
- indirect economic losses, the so-called costs of the lost benefits (opportunities) arising from the implementation of an anti-crisis measure (for example, loss of revenue opportunities due to asset sales, branch closures, dismissal of employees, etc.);
- socio-psychological losses related to the implementation and consequences of the implementation of an anti-crisis measure (for example, total or partial loss of image and business reputation, the need for certain personal commitments, non-compliance with personal and social moral and ethical standards of the entrepreneur, loss of control and sense of a sole shareholder, etc.).

As can be seen from the list above, the owner's losses are multi-dimensional and cannot be quantified (reduced to a quantitative indicator of their assessment). This determines the expediency of using expert methods to assess their level and the subsequent ranking of the set of acceptable alternatives by this criterion [3, p. 111].

The final stage is the adoption of the anti-crisis program and bringing of its provisions into functional units and their performers.

**Conclusions.** Anti-crisis measures not included in the anti-crisis program (a set of rational alternatives), but recognized as feasible for practical implementation, remain in the reserve of the crisis management controller and can be considered as a backup program. They are used when reviewing or supplementing the anti-crisis program, due to the ineffectiveness or impossibility of implementing pre-selected measures, and changes in the external and internal environment of the enterprise.

When developing and implementing anti-crisis programs, it is important to pay attention to improving their efficiency, that is, better use of allocated resources. The criterion of efficiency is the ratio of growth of the enterprise net income, obtained by investing the program, to the volume of investment. The payback period of investments can also serve as an indicator of efficiency.

The crisis extends its influence on the financial, economic and strategic levels. Under these conditions, the main problems of the enterprise management should include identification of the zone and type of the crisis; the available potential for overcoming it; development of the anti-crisis program of the enterprise operation.

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## MECHANISMS OF PSYCHOLOGICAL DEFENSE AND THEIR INTERRELATION WITH PERSONALITY PECULIARITIES OF EMPLOYEES

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**Annotation.** *The current paper dwells on the interpretation of the concept of «psychological defense» from the perspective of ontopsychology. The author has specified the defense mechanisms with respect to the peculiarities of a personality.*

**Keywords:** *ontopsychology, psychological defense, personality peculiarities, interrelation.*

The problem of effective functioning of a company determines the study of factors that affect the behavior of employees, the characteristics of their relationships, the quality of their professional and social functions performance. In this context, we turn to the mechanisms of human behavior in various life situations, in particular to the notion of ‘psychological defense’ and its interrelation with the personality characteristics. The significance of this article is determined by the need for optimization of the intensity of employees’ psychological defense, which involves the analysis of the mechanisms of its functioning in interrelationship with employees’ personality peculiarities and the identification of these peculiarities that promote the activation of psychological defense. Hence, the purpose of this article is to both specify the psychological defense mechanisms, and to determine their compliance with a person’s type of temperament as one of its features.

It should be pointed out that the psychological defense system is one of the most relevant and interesting topics in modern psychology. In recent years an increasing number of researchers have turned to the study of the phenomenon of psychological defense as an important unconscious mechanism for the regulation of human behavior and activity. The problem of psychological defense is being developed by a number of psychologists (R. Granovskaya, F. Basin, D. Titarenko, R. Plutchik, H. Kellerman, H. Conte, etc.). Despite the fact that the concept of psychological defense originates from psychoanalysis (the term was firstly introduced in 1894 by Sigmund Freud in the work « The Neuro-Psychoses of Defence «), there still is unambiguity in the interpretation of this concept in the scientific literature. The analysis of sources indicates that there are dozens of options for defining the concept of «psychological defense». Over the past decade, this concept has been very actively introduced into the context of various scientific and popular scientific works on medical, social, developmental, pedagogical and legal psychology, neuropsychology etc. There have been attempts to systematize typologies of defensive mechanisms in medical psychology (V. Proshkin); in studies of stress (V. Tashlykov); in legal psychology (A. Ratinov and G. Efremova). A number of studies are being conducted on psychological defense mechanisms that maintain the

integrity of consciousness (V. Roitenberg); on the information processing in the brain, and blocking of the threatening information (I. Tonkonogiy); the mechanisms for mental deficiency compensation (V. Volovik, V. Vid); the mechanisms of mental activity aimed at spontaneous elimination of the consequences of mental trauma (V. Bassin, V. Rozhnov), etc. Evidently, the narrow specialization of the authors still leaves the question of the systemic and universal concept of psychological defense open. However, we should define the interpretation of the term ‘psychological defense’, which would correspond to our idea about this phenomenon and the objectives of the paper.

In psychological literature the notion ‘psychological defense’ is determined as the subjective comfort of a person in all situations of tension both in professional and domestic activities [4]. Thus, psychological defense is determined by the subjective significance of an event for a person.

Interpersonal localization is commonly considered as the main feature of psychological defense. S. Rubinshtein noted that external causes act through internal conditions, and external impact results in a mental effect, just refracting through the mental state of the subject, through the prevailing system of thoughts and feelings. A person needs guarantees for immutability of his «Self».

Next we endeavor to substantiate and develop the interpretation of the concept from the perspective of ontopsychology or the «psychology of being», considering a human being as an active subject of life, distinguishing two ways of a person’s relation to life: 1) as an uncontrolled spontaneous process in which it is necessary to be thoughtlessly subject to dominant tendencies or the will of the majority; 2) as a conscious search and creation of oneself, one’s life and the life of society (A. Meneghetti). The development of this second reflexive, creative, moral attitude to one’s own life is the main goal of ontopsychology. Therefore, we associate the concept of «psychological defense» with the concept of a personality integrity. Any integrity can be subjected to psychological defense (an organization, a group of people, a family, an individual, a whole psyche), as well as behavioral manifestations (habits, life styles, skills), cognitive structures (opinions, knowledge, worldviews), motivational formations, tastes, preferences). It happens because according to the concept of A. Meneghetti, the single «Self» entirely protects itself, its manifestations and qualities. From the point of view of ontopsychology, there is a certain design-project that lies at the heart of a human being’s nature, which clarifies a person’s individuality, creates the direction that delineates one’s self-realization.

The essence of this idea is represented by the concept of the ontic In Self, which may be considered as a person’s first reality, a priori order, intrinsic core that is formed by one’s own will and manifests itself in all the physical and mental processes of the human body. The ontic In Self is the inner side of any action, knowledge and representation of a person. It radiates its impulses every minute through images, in will, dreams, health, instincts, desires. However, in A. Meneghetti’s opinion, it is difficult for a person to establish contact with own In Self in each specific case due to deforming influence of upbringing and culture. The formed filters of perception distort the reality. The deforming influence, according to A. Meneghetti, is also possessed by the monitor existing in a

human's brain that distort the true information about a person. The deviation monitor reveals itself in a whole set of negative feelings perceived by a person, in particular as fear, limitation of space, feelings of guilt, shame, prohibition, etc.

In a person's consciousness the deviation monitor acts as the «Super Ego», the voice of conscience, the guilt complex, morality and is supported by memories: an aggressive or vindictive emotion, empty pride, vanity, doubt, fear. In reality, this mechanism hinders the realization of an integral dynamic unity, therefore a person perceives himself not the way the nature created him, and lives guided by the program introduced into him [2]. Thus, both internal and external reality are subjected to distortion. In the view of ontology, a person cannot make full use of his rationality due to the loss of contact with own starting point, a point of connection with the being. This point is the onto In-Self, the point where life mediates the uniqueness of each individual, controlling the process of «I am» and giving rise to a personality, but it is necessary to gain power over this point to fulfill these functions. Psychological defense appears in response to a violation or threat of violation of psychological boundaries, which may damage the integrity of a person and a person's individuality, i.e a person makes use of some psychological means in order to eliminate or alleviate the damage that one may face from another person (E.Dotsenko, 1994).

It should be emphasized that when information is received from the external surrounding world into the consciousness and subconsciousness of a person, it is not perceived completely, but includes a mechanism for verification of incoming information, its selection, analysis, and distribution over the brain regions responsible for information storage.

In this regard it is expedient to mention the mechanisms of psychological defense that play a part in the distribution of information between consciousness and the subconsciousness. The first detailed description of the mechanisms was presented by S. Freud (1948) who considered defensive mechanisms as activities of the «Self», which began when the «Self» was subjected to excessive activity of impulses or their corresponding effects that might be dangerous to it. They function automatically, not in harmony with consciousness. In this definition psychological defense is referred to a kind of unconscious phenomena, which we call as automatism.

So all mentioned above brings us to the definition of a defense mechanism as the concepts of the depth psychology, which denotes an unconscious mental process aimed at minimizing some negative experience. The defense mechanisms lie at the core of the resistance processes.

The function and purpose of psychological defense is to weaken the intrapersonal conflict (stress, anxiety), due to contradictions between the instinctive impulses of the unconscious and internalized requirements of the external environment arising as a result of social interaction. The defense regulates human behavior, increasing its adaptability and balancing the psyche. As a rule, various defense mechanisms are to be applied.

Unfortunately, as the analysis of special literature shows, there is no clarity regarding the total number of the defense mechanisms to date - it ranges from 8 to 23.

Also there is also no clear classification for them. However, there are a number of psychological defense mechanisms, the existence of which is recognized by all authors. Naturally, within the scope of the article it is impossible to fully disclose them. Therefore, we restrict ourselves to the brief characteristics of only those mechanisms that correlate with the purposes of this article. These include, in particular:

- *suppression* or repression – is commonly interpreted as «forgetting» of unpleasant information. Suppression is the process of excluding thoughts, feelings, desires and actions causing pain, shame or guilt from the sphere of consciousness;

- *projection* – is an erroneous perception of own internal processes as if they were occurring from the outside. When projected, a person attributes own undesirable traits to others, and in this way protects him/herself from perception of these traits in him/herself. A mechanism of psychological defense allows justifying a person's own actions. For example, unfair criticism and cruelty towards others. In this case, such a person unconsciously attributes cruelty and dishonesty to those who surrounds him that results in his similar attitude to them;

- *reactive education* – is a defense from forbidden impulses by means of in behavioral expression of opposing instigation. A person unknowingly transforms from one psychic state to another (for example, hatred - into love, and vice versa). In our opinion, this fact is very important in assessing the personality of a particular person, because it shows that the real actions of a person are not important, because they can only be a consequence of the veiled distortion of his true desires. For example, excessive anger in other cases is just an unconscious attempt to veil interest and good nature, because ostentatious hatred is a consequence of love that frightened a person who unknowingly decided to hide the feeling behind anger;

- *substitution*- manifests itself in the transfer of a person's emotional reaction from an inaccessible object to a more accessible one, that leads to discharge (to infuriate over a peer employee or a subordinate);

- *compensation* - manifests itself in the fact that a person tries to find a substitute for a real or imaginary disadvantage by means of fantasies or appropriation of some qualities, characteristics, values that increase the sense of self-sufficiency. Another manifestation of compensation is an attempt to overcome frustration in one sphere owing to over-satisfaction in another sphere;

- *intellectualization* is a psychological process of unconscious attempt to abstract one's mind from own emotional experiences and feelings at the expense of exaggerated use of intellectual resources. In other words, a negative, unacceptable fact is handled in such a way that in the end it loses its emotional component, which is simply suppressed. Emotions are not explained by their true cause but through other wrong, but acceptable reasons, facts.

For example, having committed an improper act, an employee immediately experiences unpleasant feelings of guilt in this regard, but in the process of intellectualization, he fully justifies himself («I'm not the only one who did it, and even my bosses did it; there is nothing wrong with this; it is also useful for me, my family,

etc»);

- *denial* - is a complete refusal to recognize unpleasant information. The fact of denial of any events allows us to find out about the true intentions and reasons for a person's anxiety of, because a person often unconsciously denies not something unreal, but something that is important but unacceptable for him/her i.e a person denies what he/she endeavors to conceal first;

- *regression* - manifests itself in the fact that a person, in order to avoid a neurotic conflict, unconsciously returns to that period of the past when he was all well.

It stands to reason, the above list of defense mechanisms is far from being complete, however, to some extent, they are peculiar to employees in certain situations. According to A.Meneghetti, a company represents the natural body of ambitions or territorial psychology of a personality responsible for the body. On top of that, a company (as the context of economic, political, production relations, as a body, occupying a certain social, ideological position) is an organic continuation of the intentionality of a leader's personality, becoming the reference point of his (leader's) existence [1, p.47]. Personality is a unique form of existence that is distinct from any other form; this difference brings it closer to the essence of being [3]. As soon as a person chooses his/her social space and sets goals, he/she must immediately pick up ones who will fit this goal, since it is impossible to cooperate with everyone in a row, because those who stand at a lower level in any case will pull down; it is necessary to analyze the employees without settling on their schemes of work, in order to understand the direction of their interest as well as how they will develop their activities. [3, p. 30].

In our opinion it is necessary to examine mainly the employees' individual psychological peculiarities. It should be emphasized that in psychological science this concept was broken up into two terms. Initially it was believed that the definition originated from different presuppositions of human life: from birth and under the influence of the social environment. Individual features are formed «under the influence of the interaction of heredity and the social environment on the basis of natural prerequisites, which are the specific differences in the structure and functioning of the central nervous system and the brain (E. Klimova). Nowadays these two terms are not separated and reflect the totality of all components of a human's individual and psychological features. Individual and psychological features are a generalized concept, which includes the orientation of the personality, the peculiarities of the motivational, volitional, emotional spheres, character, temperament, cognitive activity, stereotypes of behavior and emotional response (M. Rezepina). This concept is widespread in modern psychology and medicine, aimed at studying the personality of a human being. However, within the frameworks of the article, we will focus only on the interrelation between the psychological mechanisms of employees and their temperament, because we believe that temperament of employees plays a key part in the effective functioning of a company.

So, a number of studies show that the dynamic manifestations of personality properties correlate with the properties of temperament (V.Agarkov and S.Bronfman, G. Aysenko, A. Libin, V.Nebylytsyn, V.Rusalov, P.Meadow, R.Plutchek, etc.). According

to S.Freud, temperament is the most general formally dynamic characteristic of the individual behavior and emotionality of a personality. The mechanisms of the formation of a subject-oriented, communicatively oriented, and Self-oriented personality structures (A.V.Libin) trace their roots back to temperament. As far as the psychological components of temperament are concerned, we should admit that in scientific literature there is a lack for a generally accepted list of psychological properties that belong to the category of temperament. Researchers refer such features of temperament as their relative stability and resistance to external influences to its basic properties. It is also underscored that the properties of temperament can undergo some changes under the influence of the change in a person's activities (V.Agarkov, S. Bronfman). The most well-known and empirically grounded approach to the temperament study is presented by Hans Jürgen Eysenck in his work «The Structure of the Personality.» The advantage of Eysenck's theory is that it relies on «a vast, over thirty-year experimental material, which confirmed the existence of such fundamental personality traits as extraversion, introversion, and neuroticism» (V.Rusalov).

Experimental studies conducted in the Eysenck's lab also showed that the formal characteristics such as the rate of the conditioned reflex formation, sensory thresholds, speed and accuracy of execution were the main criteria that distinguish extraverts from introverts (J. Strelau Jan Strelau). H. Eysenck also gives characteristics of the types of temperament.

He considers temperament as a regulator of behavior and associated with behavior internal processes. Being the foundation of the person's structure temperament performs an important adaptive function.

Next we consider the relationship between the above mentioned mechanisms of psychological defense with employees' personality peculiarities. In our case, we rely on studies that correlate with the purpose of the current article (R.Plutchek, V. Akarkov, S. Bronfman).

According to K. Plutchek, mechanisms of psychological defense are the products of ontogenetic development and learning. Defenses begin to operate in the case when the experience and / or the expression of some emotion may have negative consequences for a person. The Plutchek's concept of the mechanisms of psychological defense is based on his psychoevolutionary theory of emotions, which states that there are eight basic emotions: fear, anger, joy, sadness, acceptance, rejection, expectation, surprise. The basic emotions correspond to the above-mentioned eight defense mechanisms: suppression, projection, regression, substitution, displacement, intellectualization, reactive education, compensation [5].

Every type of temperament is linked to a specific mechanism of psychological defense. Now we will endeavor to elaborate on the latter resting upon the Eysenck's types of temperament and the studies of the authors mentioned above.

For sanguine persons - emotionally stable extroverts known for their intense activity and reactivity, alacrity and sociability – the *suppression* mechanism of psychological defense will prevail. Regression, compensation, and substitution defense mechanisms

are also peculiar to them.

For phlegmatic persons - emotionally stable introverts known for their low activity and reactivity, even temper, reliability and thoughtfulness – the denial mechanism of psychological defense will prevail. Regression, compensation, and projection defense mechanisms are also peculiar to them.

For melancholic persons - emotionally unstable introverts known for their labile mood, for being rigid, pessimistic, reticent and unsociable thoughtfulness – *regression, compensation, projection, substitution* and *denial* are considered to be the basic mechanisms of psychological defense. Reactive education is sometimes the case.

For choleric persons - emotionally unstable extroverts with predominant reactivity over activity, poor sensibility, irritability, anxiety, mutability and optimism *suppression* mechanism of psychological defense will prevail. Regression, compensation *reactive education, projection, regression* and *substitution* are also the predominant defense mechanisms.

It is concluded that for the stable types of temperament the following defenses will dominate: regression, compensation, projection and substitution, whereas substitution and intellectualization prevail for unstable types.

Of course, the results of the researches are, in our opinion, relative, since, as it was mentioned above, the problem of classification of defensive mechanisms still remains unresolved. However, on the other hand, they prove the existence of significant links between the features of temperament and the choice of defensive mechanisms.

Possessing information on the types of employees' temperament, their interrelation with certain mechanisms of psychological defense gives the opportunity to develop new methods of psychological defense and adequate use of existing ones, such as «fan», «aquarium», «fox and grapes», «ocean of tranquility» etc. All this contributes to increasing the efficiency of a company and improves the psychological climate within an organization.

**Conclusions.** Psychological defense is a multicomponent phenomenon able to prevent disorganization of a personality behavior. Psychological defense is a feature of a mature personality. It depends also on the level of intelligence, and on worldview settings, the ability to analyze, critical thinking, emotional stability, types of temperament, etc. In order to successfully interact within a company, it is expedient to be aware of such features of the employees or peers, since it will enable the development of defense mechanisms and influence the behavior of the staff. As a rule, the objects of psychological defense are the integrity of the individual, the Self-concept, self-esteem, identity and basic needs.

A person becomes conscious after it has been formed by other personalities: the family, the school, etc. So, being the late formation, the consciously logical «Self» cannot independently understand everything that is happening to him/her. Especially because the presented structure of a personality demonstrates that basically people are a product of their own subconscious. Thus, a person often cannot cope with psychological problems and gain true self-awareness without the help of a psychotherapist, in particular a technician-ontopsychologist. His purpose is to correct the ability of consciousness to

reflect the original intention of nature and to conform to this intention.

*The scientific novelty* of the study is in an attempt to substantiate and develop the interpretation of the concept of «psychological defense» presented in psychological science from the positions of ontopsychology.

*The theoretical significance* of the work lies both in the analysis and specification of the psychological defense mechanisms and in the identification of specific defense mechanisms that correlate with certain types of temperament.

*The practical significance* of the paper is that the material of the article can be used in advisory and research practice, for the students attending trainings on psychological defense.

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## PECULIARITIES OF PERSONAL TRAITS AND MEANING OF LIFE ORIENTATIONS OF HR-SPECIALISTS WITH DIFFERENT WORK EXPERIENCE

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*Annotation.* The article specifies the personal traits of HR specialists and presents a psychological portrait of HR specialists of different age categories with different work experience.

*Keywords:* HR-specialist, psychological portrait, personal traits.

The problem of the efficiency increase of labor resources is especially relevant for heads of institutions and enterprises of different forms of ownership. The financial stability, competitiveness and opportunities for further development of a company depend on the professionalism and qualification of the employees, on their creative potential. The relevance of this article is determined by the importance of HR-specialists for qualified search, attraction and selection of worthy personnel for each particular institution and enterprise.

Nowadays the importance of HR-specialists in our time is difficult to overestimate. The pace of life is continuously increasing. The time for personal and close communication allowing revealing and understanding the essence of the partner is limited. More often managers are in a situation of scarcity or almost complete absence of information about employees. In such cases HR specialists, whose range of responsibilities is very wide, come to the rescue. They are engaged in recruiting, adapting, evaluating, training. They (develop an incentives system in the company, evaluate the efficiency of the personnel. The growing role of HR specialists testifies to the replacement of technocratic models of humanistic models management, where a person is understood as the main subject of the organization and a special object of management (human being management). Therefore, psychological training of HR specialists as well as their personal traits become very important nowadays.

Now we dwell on a psychological portrait of HR-specialists with different experience of work, focusing on the characteristics of their personal traits, which is the purpose of our article.

Analysis of the special literature shows that there are numerous studies aimed at examining the psychological characteristics of the above-mentioned professional group and specifying the duties of HR specialists (V.S Ageev, T.Y Bazarov, M.N Berulava, V.R Vesnin, O. S. Vikhansky, V.V Goncharov, A.A Derkach, G. Dessler, P. Drucker, C. Ivanova, V. Markin, A.Naumov, A. Sitnikov, etc.). At the least, an HR specialist must be able to identify the qualities of a person that are important for the successful performance of a particular activity, assess correctly an employee's capabilities to effectively perform a certain type of work, promptly identify sources of emerging problems, and define the

prospective of an employee's career growth .

The analysis of the studies devoted to the problems of personnel services operation (D. Burke, Kh.P. Vinogradov, R.V. Grishkovsky, A. Zhuravlev, B.G. Zazykin, A.N. Isaenko, S.A. Kartashev, C. Sitnik, L. Sobchik, V.Tarasov, and others), as well as issues on the personnel competition (E. Aksenova, O. Zhuravleva, A. Kilba, T.V. Mikhailov, V.Yu. Rybnikov) and evaluation and certification of personnel in various situations (T.Y Bazarov, Kh.A. Bekov, E.A Borisova, and others) showed that the ability to skillfully identify and assess the personal traits of an applicant depends to a large degree on the psychological competence in a specific type of activity.

It should be noted that in psychology the methods of sensual or intuitive perception of the surrounding world by the personality of the, understanding of the inner content of another person etc formed the foundation for a number of approaches: psychoanalytic (S. Freud, K.Young, E. Fromm), humanistic (A.Adler , G. Kelly, A. Maslow) and ontopsychological (A. Menegetti). The ability to understand the *individuality* of the applicant for a certain position, which, according to A.Meneghetti, forms a person's courage in upholding his/her exclusivity, uniqueness and peculiarity should distinguish an HR specialists. «When I explore a person, I recognize his inner and outer world, his point of view, traditions, stereotypes, analyze the dynamic structures of his personality: emotions, complexes - the whole broad world of his psyche. Then I compare all these aspects with the radical intention of being, that is, with the project of the mind. Analyzing a person, I see that there is some onto In-Self, therefore, in order to help the subject achieve prosperity, I must understand his optical point of support» [3, p.90].

Thus, we see that in the era of strengthening the humanization of psychological knowledge, there is growing interest in the phenomenon of the Self-concept that influences all manifestations of the human being's personality [2]. In this context, works aimed at establishing the cause-effect dependence of the external and internal manifestation of the Self-concept on the basis of the integrity of consciousness, the motivationally demanding and emotional spheres of the individual are of the great significance (S.L. Rubinshtein). In this paradigm, the determinants of human development and behavior are internal conditions (traits), which indicates the self-determination of the individual. «The person as a conscious subject is aware not only of the surroundings, but of himself in his relations with others» [4, p.635]. The study of personality is carried out in the course of its traits research: attitudes, abilities, character. Proceeding from all mentioned above, we will focus on the specification of HR specialists personal traits, since the skills and personal traits of HR specialists are one of the conditions for their successful work. The analysis of numerous sources demonstrates (A.P. Egorshin, E.S. Maslova, SV Shekshnya, Kwiatkowski, S. Sadlak), that a portrait of a successful HR specialist consists of a set of his personal traits and professional competence. Limited by the scope of the article, we will focus only on some important personal traits.

*Communicative* success is a person's ability to communicate, establish social contacts and connections. All the activities of HR specialists are related to interaction with people. Therefore, the ability to establish positive primary contacts, to win a person's

favor in such a way that the subsequent relations with him/her will be built on positive perception and trust.

*Attractiveness* is also of great importance in this case. It is the ability to attract people, to cause instant sympathy. For people involved in interpersonal communications, it is expedient to express a positive attitude, even if they do not feel sympathy. Outwardly expressed goodwill can change the attitude to a more positive one. Thus, a human resource specialist forms an additional mechanism of social perception, which allows him/her to obtain more information about a person. However, the excessive and artificial expression of joy does not form an attraction but, on the contrary, it destroys people's trust. A benevolent attitude can not always be expressed with a smile, especially if it is obviously false. A *sense of humor* is also important in providing a positive impact on the psychological climate, production relations. Some difficult situations can be defused in time with a joke, and remarks in the form of an innocuous joke remarks are sometimes more effective and appropriate than a direct indication of a flaw. A very important moment of effective communication is the *ability to listen*, which helps to locate another person, to create a favorable attitude, to receive the information in which he/she is interested, and to exert some influence on an interlocutor. Communication and establishing contact between people occurs through non-verbal (gestures, facial expressions, body position), verbal (verbal) and extraverbal (intonation, voice, timbre, speed of speech) means of communication.

*Ability to control* non-verbal manifestations, as well as feelings and emotions (anger, discontent, indignation, etc.) is also important in the communication process. Hence self-control is also important. A person who does not know how to control himself, who is unbalanced and quick-tempered is inclined to take rash decisions.

*Aiming at success.* Orientation to the final result implies a strategic vision of the desired result, confidence in the expediency of its decision, a clear statement of objectives. The role of the HR specialist as a business partner ideally corresponds to the line of management that is aimed at achieving the company's long-term business goals. The main characteristics of the specialist are: ability to predict, crisis management, risk analysis, strengths and weaknesses of the company, ability to interact and put forward proposals in the conditions of economic and structural changes [5].

*Self-confidence.* A person who radiates confidence, a healthy sense of self-significance, creates an image of a successful, competent specialist and calls to himself an appropriate attitude. Even if an expert on staff perfectly fulfills his/her duties, but has an image of a diffident person, there is a high probability that the level of his/her professional abilities will be questioned.

*Assertiveness* is the ability to act confidently without causing harm to others. A human resource specialist should understand other people, do not infringe on their interests but at the same time intelligently and skillfully assert corporate interests.

*An active life stance*, involving activity in all spheres of life, primarily professional, recognizing one's responsibility for everything that happens, openness to new experiences, aspiration and the desire to develop, to master new knowledge and skills,

the ability to cope with difficult situations and not to give in to unexpected problems, benefit from them and perceive them as a lesson.

*Adaptiveness* manifested in flexibility, rapid response to external changes, rapid recovery after maximum energy expenditure, as well as the ability to benefit from problem situations that require the adjustment of standard patterns of behavior and reactions. The ability to implement and replace social and psychological roles is also a manifestation of adaptiveness. In M. Armstrong's opinion, an HR specialist can assume various roles that need to be realized in their specific ratio depending on the degree to which an employee takes part in the managerial decisions development [1].

*Analytical and strategic thinking*, which presupposes the ability to quickly process incoming information, to see and highlight the essential in what other people do not notice, the ability to predict the development of the situation, the consequences of its decision and choose the most optimal option for achieving the result, be able to find non-standard solutions. An HR-specialist needs some gift of foresight, intuitive thinking for the analysis of problem situations [6].

*Creative skills*. A human resource specialist often encounters situations where it is necessary to alter the habitual behavior to an uncommon, atypical and non-standard one. Creativity allows a person to seek and find original solutions in difficult situations.

*Stress-resistance*, which allows an HR-specialist to carry regular emotional stress, quickly rebuild in a new environment.

*Accuracy and reliability* involve exceptional care, the use of reliable, objective methods of diagnosis.

*Ethicality* which is manifested in the moral reliability of an HR specialist, in his honesty and decency, because of the access to confidential information, in the commitment to the values of the company.

It stands to reason that these personality traits should ideally be intrinsic for all HR specialists, regardless of their age and length of service. The key word in this case is «age». In psychology, there is the concept of the psychological age, according to which the subjective attitude of the individual to his age-related sensations is determined. It is asserted that the essence of a human being does not consist of what a person represents at the present time, but of his/her eternal inequality to him/herself, in the constant need to relate him/herself to objective circumstances and the conditions of interaction with other people. The essence of a human being is also in the need to present him/herself not only the way he/she behaved in the past or sees himself in the present, but also as he/she can and should become in the future, having achieved his/her goals, completed his/her business, changed the conditions and circumstances, i.e. to be able to change him/herself. (F. Mikhailov). In other words, a person seems to represent him/herself, his/her own Self in three temporal dimensions – the past, the present and the future. Projecting own consciousness in three dimensions at once, a person gets a complete picture of the sensations of his/her own psychological age. The violation of a person's «identity» is determined by the very type of a human activity. A person's self-consciousness is connected with the contradictions of external objective and subjective assessments of

people surrounding him/her. In psychological science, some attempts were made to determine the main characteristics of the psychological age as a phenomenon of self-awareness (E.I. Golovakha, A.A. Kronik). First of all, this is a characteristic of a person as an individual, measured in his/her own «internal frame of reference». The concept of age is derived from the concept of time and can not be determined without understanding what time it is and what the unit of measurement of this time is. The psychological age of an individual is defined as a measure of a person's psychological past, his/her personal psychological experience. A characteristic feature of the psychological age is its reversibility (T.N. Berezina). Putting it differently, a person not only grows older within psychological time, but can also “grow younger” by increasing the psychological future or reducing the past. Thus, from the point of view of psychology, the psychological age is a subjective internal sensation of the age by a person or a subjective evaluation of a person's age by another person judging by behavior patterns of a person. It is often called the internal age and it is the basis for stating our goals, tasks, the choice of a certain lifestyle, interests. Most researchers claim that our unconscious influences the psychological age. It absolutely does not depend on the current time. It is the unconscious that allows us to feel the deep experiences of the distant past as recently occurred. This kind of age is worth assessing, based on how important events of the future or the past are for us. If a person is waiting for the most large-scale and valuable events in the future, without attaching special importance to the past, he/she feels much younger than his chronological age. On the other hand if the brightest and most significant events were in the past, then a person can feel him/herself older than his real age. Simultaneously, the psychological age is also a kind of age indicator of the person's realization. If a person continues to develop personal opportunities, then this is a chance to always feel oneself younger.

All mentioned above may be applied to a work community where people of different age categories work, and, correspondingly, possess different work experience. The problem is the harmonization of relations between these categories of employees for the successful implementation of financial, economic and other activities of a company. Therefore, understanding the characteristics of psychological age is extremely important in this situation. Researchers subdivide the work communities into traditional and innovative ones. We emphasize that such a division is rather conditional. Traditional and innovative work communities are significantly different, have different corporate cultures and require different approaches to form the behavior of employees in a company. The main feature of traditional work community is the presence of a rigid social and power distance; slow career growth; an authoritarian style of leadership; high level of control; a great influence of the informal leader. Most often, the traditional work communities are represented in industrial enterprises, educational institutions, trade companies, etc.

The peculiarity of innovative work communities is the principle of their construction - the transformation of knowledge and information into commercial profit. Innovative collectives are typical for IT companies, investment companies, advertising, PR-firms, etc. They are characterized by a non-strict social hierarchy, the presence of a cohesive,

efficient team, a democratic leadership style, trust in subordinates, and so on. Accordingly, the specifics such a work community imposes an imprint on the socio-psychological portrait of HR specialists.

It is expedient to divide the personnel specialists into three major social and psychological groups: 1) traditional personnel specialists; 2) young specialists who received special training in the field of personnel management; 3) middle-aged people who have change the job, who came to the HR-services from the sphere of education, social sphere, psychological counseling, etc. (I. Yurasov, 2009). After analyzing the main socio-psychological traits of these groups, following I. Yurasov, we will outline the following features of the Ukrainian HR specialists:

1) A traditional human resource specialist is between 45 + years old. As a rule, 70% are women. The main emphasis in their activities is on the maintenance of personnel records, documentation and strict discipline. When selecting and evaluating staff, they are guided by their intuition, common sense, economic needs of the organization. When assessing people they rely on their experience. The main thing in their work is to satisfy the interests of the employee as fully as possible, provided that the organization has a good psychological climate. The interests of the owner and top management are of the last interest to them. Personnel of this type like to conduct educational work, are good specialists in the field of negotiation and communication. As a rule they poorly know modern HR-technologies. They do not like to learn. Experts of this kind completely lack an economic approach to personnel management.

2) Young specialists, as a rule, graduates of the specialty «Personnel Management». Age - 22-27 years. 80% are women. Education - higher economic. Excellent knowledge of the psychology of management. They have sufficient experience in recruitment, in recruitment agencies, in the headhunting field and «specialized search». Clever, creative, energetic, trained and willing to learn. They love and know how to earn money. Not always loyal to leadership. Specialists of this kind cultivate an exclusively economic approach. For them the main thing is the interest of the employer. They can work both in traditional and innovative work communities.

People of middle age who have changed their profession, come to the HR-services from the sphere of education, social sphere, psychological counseling, etc. Age 25-45 years. 94% are women. Education - higher technical, pedagogical, psychological, education in the field of social work. They are motivated, mobile, and loyal. They have a high potential for managerial development. This type of highly skilled specialists in the field combines traditional and innovative approaches in their activities. The specialists of this group perfectly cope with their duties, they possess modern psychological methods and technologies of management and manipulation. They have a highly developed intuition, they can feel the mood of the work community. As a rule, their work experience is 10-15 years. They are in most cases experienced professionals who clearly know their value. Such employees are more expensive, but they do not need to be taught elementary things and oversupervised. However, each organization needs an influx of new people. New people are not trapped in the existing in a company stereotypes, they

are able to look at the existing business processes in a new way, bring their experience, knowledge and creativity, which, in the end, can be a boost to a productivity growth. University graduates are the cheapest labor force, but almost always such employees have to finish their studies in the course of work, as the qualification of such specialists is low. Many organizations go through the upbringing and professional development of their own employees. They close the initial positions by the graduates of higher educational institutions, providing them with the necessary professional training and career opportunities. Such organizations closely cooperate with universities, attracting young talented people.

Young employees are mobile in the labor market, so it is very difficult to predict how long they will stay in the organization and whether they justify the funds invested in them. However, this risk can be minimized by carefully studying the motives and values of candidates at the interview stage, creating an organizational environment that provides an effective system of motivation, opportunities for professional development. This is all part of the responsibility of an HR-specialist - a modern manager in the field of human resources whose socio-psychological portrait is as follows: a man/woman between the ages of 30 and 40 who graduated from a higher education institution, who has a command of at least one foreign language. They possess modern methods of staff selection, its motivation and evaluation. They approach economically to the issue of personnel management, take into account and harmoniously combine the interests of employees and employers. They approach to the assessment of the quality of their work from socio-psychological and economic positions and assess the effectiveness of financial investments in staff.

**Conclusions.** The professional recruiting of employees depends on the level of the psychological competence of the HR specialist. The main personal traits that determine the level of psychological and professional competence include qualities related to his/her self-knowledge, the ability to exercise self-regulation of the mental state and to build effective communication with applicants. In this context the psychological age of the HR specialist, which allows (or does not allow) him/her to harmoniously develop in a modern team, to accept (or not to accept) his/her lifestyle and values.

Interaction between employees of different age categories and with different experience in the process of teamwork is regulated by the ethical standards and goals of the organization. A cohesive, friendly team determines the desire to work in it, which positively affects the company's HR-brand.

*The scientific novelty* of the study is in an attempt to outline the specifics of HR specialists of different age categories and work experience and to determine their significance for the qualified search, attraction and selection of worthy personnel for each specific organization and enterprise.

The theoretical significance of the research is that it develops scientific ideas about the specifics of HR specialists with different work experience in the implementation of their HR and management activities, complements research in the field of personal traits of this group of specialists.

*The practical significance of the research* is that the psychological portraits of modern HR specialists presented in it expand the experience in improving the professional work of the HR specialist. The article can be used in the practice of professional training of students, retraining of personnel specialists.

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## THE FORTH INDUSTRIAL REVOLUTION AND THE DISTINCTIVE FEATURES OF THE MODERN LABOR ORGANIZATION

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**Annotation.** *The main trends of the current stage of the technological revolution and the main features of the Fourth Industrial Revolution are highlighted. The main specifics of the modern avant-garde technologies have been emphasized. The basic skills of the modern employees have been analyzed. The Labor Organization compositions have been indicated.*

**Keywords:** *the Fourth Industrial Revolution, the modern avant-garde technologies, the basic skills of the modern employees, the labor organization.*

The modern stage of scientific and technological progress is the decisive factor in the socio-economic development of society, which accelerates its movement and fundamentally changes the world space, world outlook of humanity, traditional productive forces and productive relations, deeply affects the human factor, labor organization, etc/

The World Economic Forum in Davos in 2016 was devoted to global changes in the world economy, which Swiss Professor Klaus Schwab described as the Fourth Industrial Revolution. Professor Klaus Schwab, Founder and Executive Chairman of the World Economic Forum, has been at the center of global affairs for over four decades. He is convinced that we are at the beginning of a revolution that is fundamentally changing the way we live, work and relate to one another, which he explores in his book “The Fourth Industrial Revolution” [1].

An important component of the contemporary economy is computer and information technologies, which is the result of the Third, the digital revolution that has been occurring since the middle of the last century and has been continuing exploiting nowadays. Efficient use of information influence to maximize the production productivity, where the main factors are automation and communication. Today’s innovative-investment development is based on electronics, programming, computer simulation, robotics, artificial intelligence and machine-learning, neuroinformatics, laser technology, nuclear and other energy, electronic-ion-plasma technologies, new materials, nanotechnology, genetics and biotechnology, living systems, modern transport, building technologies, ecology, etc. [2].

According to specialists, the stage of technological, information, information-technology and information-electronic revolution passed in the historically concrete terms, and the stage of the fundamentally new revolution has begun. It is characterized by a fusion of technologies, where the lines between the physical, digital, and biological spheres are erased.

This revolution is connected with modern industrial technologies, which are

fundamentally changing with the help of computer-information technologies, biotechnology, artificial intelligence, 3D printing, living systems, and so on. All these different directions are united, and on their basis, completely new avant-garde technologies are appearing. Modern society is not always ready to them and the society's attitude to them is not always adequate. The current state of affairs testifies that it is a complicated, contradictory, insufficiently defined way of today's society development. We must understand that the process of transition of human society to the new stage of civilization development has begun.

Modern avant-garde technologies show fundamental changes in the development of productive forces, because they are based on radically different principles of the production functioning. These principles are related to the fact that new technologies imitate the actions of the human brain in a certain way (computer technology, robotics, neuroinformatics) and the actions of nature (biotechnology, living systems), which fundamentally change the understanding of the role of man in the modern world.

Avant-garde technologies can affect the quality of labor. They allow to completely changing the attitude towards such indicators as workforce productivity, labor content of product, number of employees. Since the number of employed at enterprises with such technologies are almost insignificant, productivity is increasing in dozens of times. Accordingly, the labor content of product decreases also in dozens of times. At the same time such indicator as the knowledge content of product increases, which requires a certain amount of modern professional knowledge and constant self-improvement from employees, but also professional skills and respectful attitude to modern expensive equipment. In addition, these technologies significantly reduce the length of the production cycle, because they work in a 24/7 mode with the maximum speed, which helps to reduce the cost of production and significantly increase its quality.

Avant-garde technologies based on processes (biotechnological, electro-ion-plasma and other processes) are now called non-machine. Such technologies give an opportunity to quickly adapt to the requirements of the present. Adapting of such technologies to continuous changes is an important characteristic, because it allows you to quickly take into account the needs of both production and people. Since such reconfiguration is included in the algorithm of functioning of modern production, it can be carried out promptly, depending on requirements, and almost instantaneously. This feature is very important and gives significant time savings and allows the company to be in the leaders at all times, releasing small lots of competitive products, constantly being placed under the demand of time and permanent changes of consumer.

Important characteristics of avant-garde technologies are that they: are implemented using a resource-saving way (based on the use of synthetic and composite materials); are environmentally friendly (closed production cycles with the recycling of industrial waste, sewage treatment); are reliably controlled based on the application of electronic achievements in order to achieve the desired quality of products; in the case of the use of machines, require a minimum amount of the labor force. The latter is an example of complex automation functioning with the help of robot complexes, rotor lines, flexible

production systems, modern transport, power engineering, where the functions of the employees are only the control over the operation of automatic systems and their adjustment. The main workplace is a controller with programming skills and with a detailed understanding of the complete algorithm of the entire process.

High technologies fundamentally change the production process, and the most importantly, the place of a person in it, because they influence and change productive relations fundamentally. Certain features characterize these technologies. If they are based on processes, then such technologies are almost non-machine.

From the standpoint of the latest technologies, there is a real human release from the process of direct production and essentially «non-people» technologies are formed. An enterprise with such technologies should be considered as a self-organizing system. Such enterprise quickly responds to external changes, makes the necessary calculations, requests required or the system itself adjusts itself, does not require human labor, retraining of specialists, so the re-adjustment takes place in the shortest terms, which gives great savings resources and time. Of course, the main impetus is made by a person who is then released from the production process and has only a function of external control.

Such new technologies change the worldview, the whole philosophy of interconnections of the traditional production components. This new paradigm changes the world as a whole, changes the interconnection of the components of the production process: objects of labor, tools of labor and living labor itself. Conscious or not, a person carries out a fundamental influence on the very essence of social and productive relations as takes out such element as living labor leading to vanishing of a large number of traditional professions, repulsing of professional knowledge, releasing of workers, growing of the labor market, increasing of social instability, etc.

It is important to emphasize the impact on business. The formalization of modern production is connected with 1) advancing development of technical and technological components of modern production, 2) a desire to produce in the shortest possible time essentially new products of the highest quality with minimum costs, and, most importantly, to have time to realize these products while it is competitive, 3) to receive super profits. Such a production process leads to the alienation of knowledge and information from their creators and carriers. There is an outburst of living labor from the manufacturing sector, which is characterized by the loss of jobs, the loss of professional experience of specialists, the growth of negativism to modern «non-people» technologies, the exacerbation of social tension, etc. All these components are a challenge for the government of each country.

The external environment fundamentally changes the technological basis of the production process and affects the internal structures of the social and production system. Robotics of production considers an employee as an unpredictable and conflicting element of production, which requires wage growth, increased social welfare costs, health insurance, training, retraining, advanced training, etc. Complete formalization of the production process eliminates living labor and requires the complete intellectualization

of this process. The main content of labor today is its mental component, which is characterized by such a necessary sign as cognition and based on the corresponding volume of modern professional theoretical and practical knowledge. A modern, creative, young specialist sincerely wishes to realize himself and his knowledge, to get his new professional experience, does not always understand the further influence of modern trends on society, on living labor, on the employees, on the labor market, on changes in industrial relations.

The latest concepts of the labor organization are related to the advanced development of technical and technological components based on microprocessors and microcomputer systems, which leads to a real human release from the direct production process. The technical and technological components are a basis of artificial intelligence. Already, artificial intelligence is not only in manufacturing, but also in all around us, from drones and self-driving cars to virtual assistants and software that translate for us, read to us, play and buy with us.

Under such conditions of using of artificial intelligence, in the first stage the main production task of a person or collective is necessarily a complete representation of the final result, its formalization, the creation of an algorithm to achieve the goal on the basis of a technological cycle or technological chains as a whole. It is clear that a specialist of this level must have professional knowledge of related fields, modern thinking, creativity, teamwork, responsibility and creative approach to the task. Above all such workers have to be provided by a work place and they provide the operation of super complicated technological processes of modern automated production.

The Fourth Industrial Revolution affects the labor market. Thus, in the next some years there will be a radical change in occupations, that is, the skills, which were required by the market for decades, become morally obsolete. According to analyst firm Forrester, by the year 2025, 16 percent of today's jobs will have given way to automated positions. According to Oxford University, as many as 47 percent of jobs in the United States will become fully automated within the next 20 years. This will lead to a transformation of labor, and will generate new job opportunities [3].

At the World Economic Forum in Davos in 2016, the main requirements for future professionals were identified that would affect employment, professional skills, and recruitment of staff in various sectors and regions. These and other new skills are necessary to thrive in the new landscape. In 2020 they are: complex problem solving, critical thinking, creativity, people management, coordinating with others, emotional intelligence, judgment and decision making, service orientation, negotiation, cognitive flexibility [4].

The following main factors influence the forms of labor organization at the enterprise: scientific and technological progress, its features, tendencies; the specificity of the organization of production system, which is related to the demands of the Fourth Industrial Revolution; conditions of the external and internal environment, taking into account political, social, economic, national and other factors; psycho-physiological factors based on recent studies of many sciences, including ergonomics, medicine,

psychology, etc.

Taking into account current trends, the basic requirements for the concept of «new forms of the labor organization» can be defined. First of all, these new forms should not be the sum, but the synthesis of requirements, that is, the synergetic effect must provide material, creative, economic, cultural, social components. A certain form of labor organization is not single-versatile, but flexibility, which is defined as the requirements of specific technologies, ergonomics, and social requirements.

The modern economy is characterized by uncertainty in the areas of technological development. Firstly, that modern technology is not strictly set; secondly, there are alternative directions and they are based on new research in the field of fundamental and applied sciences, where it is impossible to determine what will give the future an innovative effect; thirdly, the development of a particular technological direction and its effectiveness depend on further funding for research and its widespread implementation.

The new technological era causes new changes in the development of society, provokes social challenges, destroys labor markets. Technological innovation leads to a revolutionary breakthrough in efficiency and productivity. Tendencies of the Fourth Industrial Revolution plans that the machines will communicate with each other without human intervention, and then the main task of employees at the workplace will be to monitor machines and computers. The real economy and the digital economy have become one. The information and communication technology (ICT) sector, industry and government have a responsibility to uncover potential of the Fourth Industrial Revolution for a better life for everybody with opportunity for employment and decent salary.

Consequently, the main components of the concept of the modern labor organization can be attributed to the following. The employee is on the first place as a creative person who can combine his personality, professional knowledge, communicative and time requirements. Next is the workplace, which today must combine the formal and informal components of the labor organization. The neoteric working place is not determined by the strict attachment to the place, city, region, etc., because the emphasis is placed on professionalism and responsibility. An important component is the understanding of the complexity of the problem, which is associated with the solution of its various components, belonging to different industries as a whole. For the successful solution of the *проблемы*, it is necessary to have an employee with additional powers that allow combining different tasks in one unit with one performer.

The employee's motivation is a prerequisite for maximizing using of the employee's abilities and opportunities. The employee's interest encourages him to continue his education and creativity. The labor organization of the modern employee includes self-planning and self-control, based on the understanding of the content and the ultimate goal of the individual work and the whole task. It is important to organize collective work of personalities, where functionally equal professional educated people with a sense of responsibility are united by a joint labor.

**Conclusions.** The distinctive features of the labor organization are connected with the new needs of the social-technological revolution, are taken into account the

information component of the digital economy, are based on the humanization of labor, are characterized by an increase in democratization, namely: joint discussions, analysis of proposals of employees, establishment of individual orders, permission for alternative way to perform tasks, reducing of regulatory restrictions, attracting of certain performers to the production process, etc. Additionally, we must take into account the growth of collective responsibility for the end result, for all-round quality, based on strict adherence to the technology of the production process.

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## DIGITAL MANAGEMENT AS A TOOL OF THE WORLD'S MOST ADVANCED TECHNOLOGIES MANAGEMENT

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**Annotation.** *The article considers the prerequisites for the formation of the foundations of the digital management as a tool for managing advanced technologies. The technological and media approaches to the development of the digital environment are defined. The authors' vision of such a new instrument of the modern paradigm of management, like digital management, is proposed in the article. The analysis of economic industries on the level of digital maturity is carried out. The nine main directions that define the general architecture of digital management and characterize the scale of the future digital transformation are revealed.*

**Keywords:** *digital management, advanced technologies, digital environment, digital transformation, management, technological and media approaches.*

**Setting of a problem.** Management of the XX century was characterized by the choice of straightforward and unhurried solutions. However, today's dynamic business environment is not only becoming increasingly dependent on many factors, but also more integrated, more complex and at the same time more nonlinear. In this regard, managers of different levels of management are faced with an extremely difficult task to learn how to manage nonlinearly and to prevent the occurrence of possible negative events.

The economic and social foundation left over from the past, and the rectilinear planning of various kinds of "achievements", in the previous periods of time did not lead to immediate negative consequences, but now, in the digital age of the development of global socio-economic systems, can become simply fatal. For this reason, an effective manager must master the ability not only to manage modern production processes, but also to manage changes in the pace of changes in the surrounding world. Today, in the era of intellectual revival, due to the existence of modern digital technologies it is possible to find the best solutions, first changing the surrounding world virtually and only then, making sure that the consequences of those or other decisions can not harm the environment, or social and economic development of the territories, implement these solutions in real life.

**Analysis of recent researches and publications.** Scientists have long paid attention to the fact that information as the basis of human intellectual activity is primary in relation to various material carriers of information. Consequently, it does not disappear when consumed, and is not transmitted completely in the information exchange process, but exists inside the information system and remains at the disposal of the user, and finally remains indivisible [9, 13, 14, 16].

Probably, most importantly, in the conditions of using digital technologies, there is a fundamental possibility of generalizing information, in the process of obtaining from the information of so-called meta-information. And this new resource, unlike other ones, is practically inexhaustible. The growing role of information and information systems is the first principle of the concept of building and forming a new “digital” society, at the core of which is nothing but pervasive intellectual computer technologies. Such a transformation of human society leads to a radical transformation of all types of social relations, including management. Of particular relevance is the complete revision of the classical theory of management in the form in which it was proposed by Frederick W. Taylor, Henry Ford, Anri Fayol and other classics of management, since it was limited to ideas of exchange in the material world. The new virtual world created by human mind, the world of new digital opportunities, is the newest tool of the world’s most advanced technologies, allows to correspond appropriately with the surrounding material environment, preliminarily practicing possible solutions on virtual and digital models to provide not only local but, civilization consequences [9].

The observance of the concept of the advanced technologies increases the share of uncertainty and accordingly the risk, since decisions taken today will largely be realized only in the future, when both the conditions and the decisions themselves can undergo an incredible change. In this regard, the main task of management science in making such an important decisions is to get the maximum amount of information from any set of data necessary for the formation of an adaptive control mechanism with the indispensable use of modern digital technologies that are not only a means but also an effective method of managing the socio-economic systems.

**Goal setting.** Therefore, the purpose of this study is to examine the formation of the foundations of digital management as a tool for managing the world’s most advanced technologies.

**Presentation of basic material of the research.** The period of the birth of the digital environment dates back to the 80th years of the 20th century, when the world experienced a transition from analogue electronic media to digital media. At this time, personal computers and global networks are becoming widespread.

In 1992, in the article “Pools of Memory, Waves of Dispute” of John Markoff and in the article “On Language” of William Safire, published in the “New York Times”, such neologisms as digital (literally means “digital environment”) and digerati (literally means “an individual capable of manipulating and processing digital information”) were used officially for the first time [2].

The article, published by John Markoff, was devoted to the study of the main contradictions, which were previously mentioned in the scientific works of George Gilder and William Safire, where the essence of the above-mentioned concepts was described [2].

Complex analysis of the digital environment allows us to distinguish two basic theoretical approaches to the definition of this concept. Thus, the first approach, widely known as the technological one, considers the digital environment as a separate

technology and the space of certain objects. The most typical definitions that are typical for this approach are as follows:

- digital environment is a logical object environment that is used to describe (simulate) other environments (in particular, electronic and social ones) based on mathematical laws and principles [1];

- digital environment is an electronic technology that uses discrete values, like 1 and 0, to generate, store, and process data. In digital technology, data is transmitted and stored as strings of zeros and ones, each of which is referred to as bits. These bits are grouped into bytes to represent data, for example, numbers, letters, images or sounds [15];

- digital environment includes the entire continuum of computer and network technologies. In this regard, the basic components of the macrostructure of the global digital environment in this case are the following ones:

- the segment of telecommunication systems and networks, which covers Internet – web 1;
- the segment of social networks and platforms – web 2;
- the segment of mobile applications (smartphones, tablets etc.), which is considered to be the one of the fast growing segments in the modern economy – web 3;
- the segment of payment networks like PayPal, SWIFT and the Bitcoin;
- the segment of dedicated embedded processors for the existing industrial, social and urban infrastructure (the so-called “Internet of things”), as well as embedded microchips for medical implants, toys and clothing (the so-called “BodyNet”), which are connected to certain control centers via Internet [14].

In contrast to the previous one, media approach considers the digital environment as a digital display of the media platform and communication technologies. At the same time, media are considered quite widely, since modern media includes not only mass media, but also the main aspects of social and cultural human life, including urban navigation, interpersonal relations, which are carried out exclusively due to the modern digital technologies. This approach assumes that digital technologies open the boundaries between the creator and consumer of content, lead to the merging of production and management processes.

The digital environment is a new environment that de facto changes geographic boundaries, as well as increases the amount of information, makes it possible to increase the speed of information transfer, makes interactive communication accessible and allows various forms of communication to unite into a single whole (Neauman R. cited by Croteau D., Hoynes W.) [3].

Within the framework of this approach, two theoretical directions of the study of the digital environment have emerged: technocentrism and anthropocentrism. Representatives of both directions agree on the merger of spatial processes with digital technologies. But the only difference between these two directions is to understand the possibility of digital technologies to act as independent agents of action and create special types of reality.

Thus, one of the representatives of technocentrism direction, Lev Manovich defines the digital environment as a new environment where all political, social, cultural processes should be viewed through the prism of the logic of computer programs: “Software is the interface between our imagination and the world: the universal language spoken by the whole world, and the universal engine that drives the world into motion” (L. Manovich, cited by O.N. Zaporozhets, Ye. G. Lapina-Kratasiuk) [12]. This idea is developed by L. Manovich with the help of the concept of cultural transcoding in his book entitled as “The Language of New Media” [5] and in his another scientific work, famous as “Software Takes Command” [6, 7].

On the contrary, representatives of anthropocentrism direction, well-known Canadian sociologists B. Wellman and L. Rainie [8] and American technology researchers Souza De Silva and A. Gordon [4] also consider the digital environment as a place for communicative processes, but consider that the scenarios of using digital technologies are not embedded in the digital environment, but are formed with the help of a person’s ability to adapt technologies for their own needs, as well as through the influence of cultural and social aspects.

Taking into account the above-mentioned scientific positions of the representatives of both directions on the merging of spatial and human processes with digital technologies, we would like to concentrate our attention not on the issues of the possibility of digital technologies to act as independent agents of action and create special types of reality, but on the existence of a digital environment as a medium habitat, and the necessity to manage it.

So, it is necessary and expedient to use the new tool of the modern management paradigm – digital management, which, in the framework of this research, is proposed to be considered not only as a tool for managing digital technologies, but also as integration of spatial business processes, human factors, communicative media and digital technologies for the purpose of formation of a digital or virtual model for managing a socio-economic entity.

The important role of digital management in digital transformation still remains relevant, as evidenced by the results of research conducted by Gaggemini Consulting and MIT Sloan School of Management (See Figure 1).

Nowadays among the leaders of digital production are: high-tech-industry organizations, banks and retail business structures, which now get the most benefit from digital transformation. Telecommunications and hotel business sectors need to change the current business model and to use new management methods. On the contrary, true conservatives turned out to be insurance companies, which, above all, are worried about risk reduction, which hinders the introduction of any innovations. In the energy and housing sector of the economy, inherited infrastructure creates certain problems. Beginners in the ranking of digital maturity are the companies from pharmaceuticals, industrial production and consumer goods production, which still have to build a model of digital transformation.

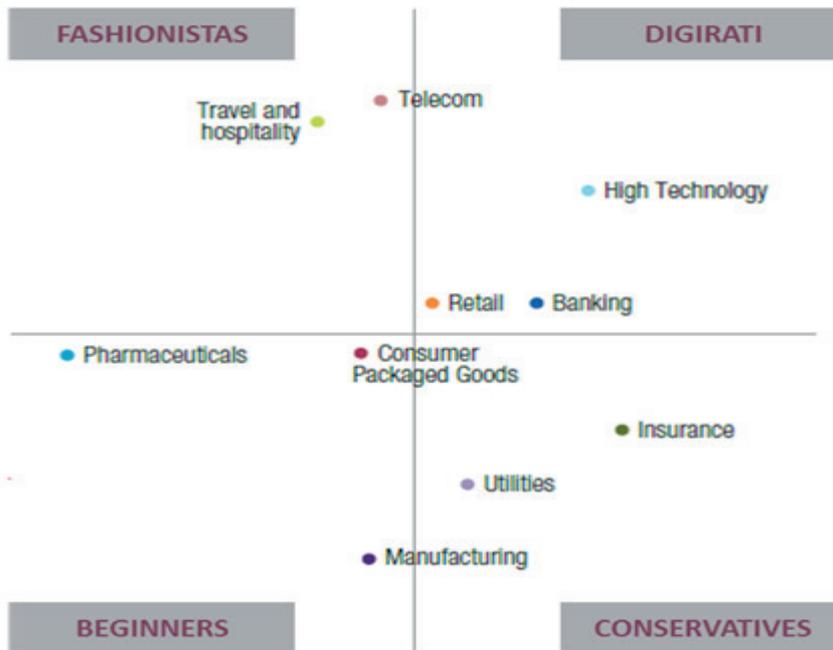


Figure. 1. Digital maturity in the context of individual economy sectors [10, 11]

Thus, it is necessary to develop and implement in practice, purposefully and interactively, special management solutions based on the technologies being studied, the main objective of which is to form an integral and effective digital ecosystem. In this connection, authors proposed the main directions that define the architecture of digital management and characterize the scale of further digital transformation [compiled by the authors on the basis of 16]:

1. Digitized objects and models.

First of all, digital data, especially of economic and managerial nature, require translation into semantically correct and complete information structures. Secondly, the reflection of real-world objects in virtual space makes it possible to widely use digital technologies, therefore digital objects act not only as structured data subject to automated processing and analytics, but also as integral controlled entities that significantly expand the possibilities for their creation and application. Digital objects “revitalize” domain data through extensible functionality and interfaces. Target models are constructed on the basis of related and interacting digital objects that provide economic entities with options for their active application to solve a wide range of practical problems.

Within the framework of the concept of digital governance development, the task of a global transition to a network of interacting digital objects in the environment of integrating digital platforms arises. Such a solution can reorganize and improve the

quality of digital data used, increase the level of information interaction, minimize technical and semantic errors and improve controllability, including security.

#### 2. Digital trust.

In a global information network where all stakeholders interact remotely, confidence is of particular importance. Therefore, there is a need to effectively solve the trust problem in the digital environment by providing basic functions such as reliable identification, reliable authentication, and correct user authorization. In order the digital trust to be really effective and full, it is necessary to implement special advanced functions, the most important of which are the following ones: accumulation, storage and presentation of information about the reputation of an economic entity (digital object); creation, execution and control of algorithmic contracts; formation and actualization of motivational factors of influence in decision-making. Moreover, expanding digital trust, it is necessary to ensure the legitimacy and legitimacy of transactions. Without a fundamental solution to the issues of trust, the further development of the digital economy is associated with a constant increase in the number and diversity of risks, the likelihood of their occurrence, and the increasing complexity of managing agreements.

#### 3. Transfer of public data.

In modern economic conditions, business and the state are increasingly faced with the problem of collecting and accumulating unnecessary data. The policy of open digital data on the part of state organizations and the mechanism of sharing data by various organizations and individuals are of particular importance. Transfer of public data is a system and platform solution that should allow for the mutual exchange of public, distributed commercial and delegated personal data. In this context, mutual exchange should be understood not only as static loading of data sets, but also as the dynamic access to storages by unified requests based on the API, and also providing access to pre-processed data sets.

#### 4. Competence network.

The network of competences is a managerial solution to the problem of interaction of tasks, knowledge and experience, that is, a kind of marketplace where projects meet the goals and objectives of the customer, individual workers or teams that provide their own competencies for the implementation of projects. Obviously, the solution is not to organize meetings of interested persons, but in the functional, which is in demand on such a platform in the regime of high digital trust. First of all, it is the accounting and control of the competencies of a certain specialist or an integrated team of specialists, the evaluation of competencies and projects, certification and peer review, competency and project analytics, professional communication etc.

#### 5. Shared consumption.

Digital management involves the so-called shared consumption. However, fair, qualitative and competitive joint consumption requires an appropriate legal and management solution, protection of suppliers and customers, support for basic legally significant transactions, provision of guarantees, mitigation of possible risks, control of consumer safety and ensuring a high level of digital trust.

6. Custom markets.

The number of consumer characteristics is increasing, and increasingly they can be adjusted depending on the needs of a particular client. At the same time, the suppliers of personalized products and services try to own valuable information about their actual and potential consumers in order to most accurately identify and manage the target segments of the market. The development of additive technologies makes business structures actively develop various technologies and personalization approaches.

7. Programmable law and algorithmic regulation.

It is obvious that digital management expects a new quality of regulation of relations between traditional economic entities: consumers, business structures, state and social organizations. However, with the advent of such new subjects as “smart” things, special algorithms and digital objects, as well as with the emergence of a new category of digital assets, there is a need to allocate additional section of law. It would be effective to introduce this digital code, which would be implemented as a programmed legal model of digital objects, which allows for the automatic implementation of the right by economic entities or issuing instructions to these economic agents to fulfill their obligations.

8. Digital risk management.

Digital management should include appropriate digital risk management, which will not only apply and create specialized knowledge (up-to-date information and professional experience), but also have different tools (techniques and technologies for preventing, eliminating, compensating for risks and recovering from adverse events), offering training programs, develop and protect various tools and platforms.

9. Distributed projects.

With the development of the digital economy, consumption patterns become quite complex, and business projects integrate so many participants that the management of a particular target project is already turning into a time-consuming and complex task. It is necessary to link and combine investment strategy and scarce material and distributed information resources, to select a competent project team, to coordinate and structure parallel and intersecting tasks, to ensure a steady pace of their implementation, but taking into account the high speed that digitization generates. Distributed projects as a new qualified level of information management – presuppose additional time consuming transactions with data sets and with digital models, so their further implementation is impossible without full automation based on digital technologies.

**Conclusions.** These nine directions for the systemic and competitive development of digital management may not be a complete and exhaustive list, and they are not final, but they include the necessary basis for the development of a new, high-quality tool for advanced technologies – digital management.

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## INFLUENCE OF PSYCHOLOGICAL ADAPTATION OF EMPLOYEES ON THEIR INCLUSION IN A NEW LIFESTYLE

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**Annotation.** *The article presents an analysis of the problem of psychological adaptation in modern psychological science, defines the concept of «psychological adaptation», specifies its goals.*

**Keywords:** *psychological adaptation, social and psychological adaptation, social environment, interaction.*

In modern economic conditions the effectiveness of an organization is determined by the quality and competitiveness of its employees, whose main feature is the ability not only to coexist with the environment, but also to realize in this environment their own internal potential. Therefore, the problems of staff adaptation and the management of staff adaptation increasingly attract the attention of companies' leadership and are considered by them as a factor to improve both the efficiency of the company and professional activity of the staff.

Thus, the significance of the chosen topic has been stipulated by the strengthening role of the human factor in companies' management. «Now we exist in a new world and therefore we need a different way of relating to the objective reality and to ourselves.» The new world in which we exist is, first of all, a dynamic, ever-changing reality that requires from a person not just a conventional adaptation, but the ability to build strategies for one's behavior in the face of ever-increasing rates of social change. [3, p. 9].

The *purpose* of the paper is to study the influence of psychological adaptation on the staff's ability to quickly acquire a new life style. The purpose is achieved by implementing the following *objectives*: 1) to present an analysis of the problem of adaptation in modern psychological science; 2) to determine the essence of psychological adaptation; 3) to specify the purpose of adaptation and its impact on the staff.

Our analysis of studies on psychological adaptation makes it possible to single out the following fundamental directions: 1) the studies that deny the adaptation of a person in society and 2) the studies that recognize it.

The first direction is based on the concept of existentialism, with representatives who recognize a person as completely free, separate from society and its laws. Representatives of the other direction consider the adaptation of the individual in the context of the assumption about the estrangement of the social environment from a person, considering adaptation as a form of the protective adaptation of a person to social requirements, as an exit from a stressful situation, as mastering new social roles, as overcoming tension. An opinion has been expressed that adaptation is a set of adaptive reactions based on

active development of the environment, its change and creation of necessary conditions for successful activity (T. Shibutani, 1998).

The initial Latin origin of the word «adaptation» means «approaching to what is suitable.» This meaning of the concept is used in biology, often being a synonym for the word «adaptation» and denoting the adaptation of the structure and functions of the organism to the changing conditions of its existence (P. Chernykh, 2002). However, in terms of psychology this understanding of adaptation is too narrow, because a person is not only a natural being, but rather a social one, hence passive adaptation can not reflect the whole diversity of the emerging relationships between the individual and the social environment.

The process of human adaptation has two sides - behavioral (social adaptation) and personal (psychological adaptation). Socio-psychological adaptation as a phenomenon results from the interaction of two systems - the personality and the social environment in situations when the habitual for a person social environment is changing, or there is a need to change the way of interaction with it. This position corresponds to the methodological provisions on the individual and society unity and the active nature of their interaction. In this regard, it should be noted that from the middle of the 20th century, a direction is beginning to take shape in the understanding of adaptation, whose representatives proceed from the methodological provisions on the unity of the individual and society, the active nature of their interaction (M. Dyachenko and L. Kandybovich, V. Kovalev, N. Syrnikova), developing theoretical and applied problems of professional and socio-psychological adaptation in the productive and non-productive spheres of human activity.

The provisions developed in the concepts of L. Vygotsky, A. Leontiev, S. Rubinshtein, K. Abulkhanova-Slavsky, A. Petrovsky, E. Shorohovoy disclose the essence of the adaptation process as an expression of the integrity between the interacting parties - the individual and the social environment. The integrity is based on the activity of the social environment and the activity of a person, which is focused on the knowledge of the surrounding world, and on the development of clear principles and certain modes of interaction that permit both to adapt to the changed social conditions and to transform them as necessary. Such an understanding of the basic characteristics of the personality in the process of its social and psychological adaptation focuses attention on the subject of adaptation, while the social environment, acting as an object of adaptation, is considered statically, without demonstrating the interrelationship. Based on the provisions of A. Leontiev, K. Abulkhanov-Slavskoy, V. Myasisheva, A. Petrovsky and on the activity of a personality, P.A. Prosetsky and V.A. Slastenin consider activity as an internal and peculiar to the process of adaptation inception. The interrelation between a person and the environment can be regulated by socio-psychological means that include language, various forms of social consciousness, social institutions, roles, social norms, stereotypes and attitudes, as well as social and individual strategies and methods of adaptation (V. Vygotsky, 1984).

Among the works on psychoanalytic theory it is expedient to single out the conceptual approach of E. Erikson (1996) who put forward the idea of mutual continuous adaptation of the individual and society. In the Erickson's concept of psycho-social development the main carrier of adaptive functions is the ego. Its main task is the process of formation and development of identity, which protects the integrity and individuality of human experience, enables a person to foresee both internal and external dangers and to commensurate his/her abilities with social opportunities, provided by society [7, p.8]. The degree of psychosocial adaptation effectiveness depends on the success of the individual's resolution of development crises, which is affected both by the social environment and the internal personality of the individual. The adaptation process in his conception is described by the formula: contradiction - anxiety - defense reactions of the individual and the environment - harmonic balance or conflict.

Within the framework of the article it is not feasible to give a full analysis of the directions and provisions on the topic of adaptation that dominate in psychological science. However, having examined the studies that dwell on the personality, we have come up with the conclusion that adaptation is considered as a process of changing the interacting sides. Personality, entering into a new social environment, changes the system of its relations in a certain way. In its turn, the group reacts to the appearance of a newcomer by adjusting their norms, traditions, rules, forming a new social environment, the sphere of the nearest environment, to which the person adapts.

The foregoing analysis correlates with the provisions of ontopsychology. When we say «personality and environment», we can understand by this the interaction carried out by the subject in the surrounding economic, political, social environment; the relation or reaction that arises between the cell and the space adjacent to it; a specific reaction of the genome, correlated with the environment that creates an organic substance [3, c.8].

A. Meneghetti distinguishes three possible modi of life: 1) life as an adaptive existence in accordance with the laws of the surrounding world, based on adherence to the rules of its time and social circumstances, while the proposed life models are unconditionally accepted; 2) the skill of life as the ability to achieve more, its indicator is success in the socio-historical context, combined with subjective satisfaction of a person; 3) the art of living as «the ability to influence life in order to bring novelty into being». Instead of participating in the recurrence of the objective world existence cycle, a person acts in a way that his/her life becomes the natural background for the creative game of his/her own personality «(A. Meneghetti, 2001). It is not difficult to see that the last modus of existence described by A.Meneghetti is accordant to the strategy of «life creation».

According to A. Meneghetti, human nature is manifested through the semantic field. The semantic field is the basic communication that life uses between its individuations. In this process, the following components of the personality are involved: the conscious «Self» and the domain of complexes, lying in the subconscious. Only 30% of relationships between subjects are consciously conducted, the remaining 70% are at the level of the unconscious [2]. There are all the resources necessary for self-fulfillment

inside each part. The more a person's path deviates from the direction of realizing his possibilities, the greater the feeling of dissatisfaction. When a person realizes his/her individual characteristics but his/her current way of life interferes with self-realization, he/she needs to carry out a metanoia (change of mind), which will result in the beginning of his/her project implementation.

Thus, within the general process of adaptation the psychic sphere serves an integrative and regulative function in the activity of all systems of the organism. The organization of the process of psychological adaptation, the implementation of the interrelationships of its main aspects, the regulation of psychophysiological relationships are usually realized by a complex, multilevel functional system where regulation is carried out at different levels primarily by psychological (socio-psychological and actually mental) or physiological mechanisms.

Next we will endeavor to elaborate on the concept of «psychological adaptation». It has been mentioned above that we are interested in studies that consider adaptation in the context of personality behavior, since personality acts as the most generalized and stable integrity of psychic properties and processes that became apparent in various manifestations of activity and in various social conditions [1, p. 10].

The analysis of studies on adaptation problems shows that there are various approaches to the concept of «psychological adaptation». A. Aleksandrovsky (1976) considers the notion as an expression of the systemic activity of many biological and psychological subsystems that ensures a human being's activity at the level of «operational rest», allowing a person not only to best oppose different natural and social factors, but also actively and purposefully influence them. This definition rightly emphasizes the systemic organization of psychological adaptation and the important role of purposeful activity. V. Volovik describes it as an active personal function that ensures the coordination of the individual's actual needs with the requirements of the environment and the dynamic changes in living conditions. F. Berezin defines psychological adaptation as the process of establishing the optimal correspondence between a person and the environment in the course a person's activity that allows the individual to satisfy actual needs and realize the significant goals associated with the needs, ensuring compliance of a person's mental activity with the requirements of the environment. The researcher states that psychological adaptation plays an important part in maintaining adequate relations in the «personality - environment» system. F. Berezin (1988) identifies the following levels of psychological adaptation:

1. The individual psychological level, which includes personal and typological characteristics of a person, his current state (motivation, ability, level of self-awareness development, self-control, self-esteem, self-control, temperament, emotional and intellectual characteristics, etc.). At this level both mental balance and mental health is maintained are maintained.

2. The socio-psychological level, which includes the features of microsocial interaction. At this level, the formation of adequate interpersonal interaction, the recording of the environment, the achievement of socially significant goals are maintained.

There are two main types of adaptation process: the first type is characterized by an active impact on the social environment, and the second type is characterized by passive adaptation (conformist acceptance of goals and group orientation). These types of adaptation process are formed depending on the structure of a person's needs and motivations and are identified in the process of group and interpersonal interaction (F.Berezin, 2002).

So, in the process of adaptation, a personality adapts to the environment, and in the course of active interaction with the environment a person changes his/her properties, characteristics, «... changing self-identification, value orientations, role behavior» [4, p.27].

Such an interpretation allows us to understand the differences between psychological and socio-psychological adaptation. Being a part of human activity, which in psychology means a dynamic system of interactions between a person and the world, in the course of which both the emergence and embodiment of a mental image within the object and the realization of a person's relations mediated by him/her in the objective activity occurs [5, p.101], socio-psychological adaptation is the non-identity to adaptation notion.

In this article, by the notion of «socio-psychological adaptation,» we mean a psychological adaptation and social adaptation in their integrity, which allows a person to achieve self-realization in harmony with the social environment. At the same time, these aspects of adaptation are not identical, and sometimes even come into contradiction. The social environment can both facilitate the process of adaptation, and make it difficult. Whichever internal adaptation resource is possessed by a person, if a society or a group does not recognize a person's values, norms or does not provide an opportunity to satisfy significant needs, successful socio-psychological adaptation will be extremely hampered or even unfeasible.

Thus, socio-psychological adaptation as a phenomenon results from the interaction of two systems – a person and the social environment. It usually appears in situations when the habitual for a person social environment is changing, or there is a need to change the way of interaction with it. This position corresponds to the above methodological provisions on the integrity of the person and society, the active nature of their interaction.

Having defined the notions of «adaptation» and «psychological adaptation», in accordance with the purposes of this article, we will endeavor to examine the influence of the above-mentioned concepts on the process of a person's adaptation. We will begin by defining the goals of employees' adaptation for both the organization and the employees themselves. The study of the psychological sources made it possible to specify the goals as follows: the identification of the employee's potential; the identification of gaps in the staff selection system; the formation of an idea of the socio-psychological portrait of the employee and effective methods which would spur an employee to do more; employees' anxiety and uncertainty reduction; reduction of starting costs - an employee who is poorly familiarized with his/her immediate duties, works less efficiently and requires additional costs; staff turnover reduction, because a new employee who feels uncomfortable or unclaimed is subject to dismissal; saving time for the manager and other employees,

because the consistent implementation of the adaptation program helps to save time for each of them; development of a positive attitude towards work, satisfaction with the results of their work. On top of that, acquiring and consolidating interest in the work become interesting not only in personal achievements, but also in the achievements of the organization; to establish personal and business contacts with colleagues, to join the public life of the company; to develop loyalty to the corporate culture of the company; to take the existing rhythm, pace, volume of intellectual and physical load, mobilize its potential; to relieve the emotional tension associated with entering a new collective; to develop the ability to adapt to the new environment.

However, in order to succeed in adaptation, it is impossible to ignore the importance of internal factors, since the same external influences are differently refracted through the inner world of a person. For example, a person's behavior under the new conditions can be determined by the «passive position of external coherence of his/her interactions with others; by an active position, when the individual seeks to understand people and gain the trust of others to influence them; cautious attitude toward «reading» people and a situation; simple adaptation, fawning on the strong in order to obtain their protection «(V.Selivanov, 1998).

It should be underscored that groups of internal factors are analyzed from the point of view of 1) the highlighted features inherent in a particular subject; 2) attempts to categorize individual differences: personal (demographic characteristics, length of service, duration of residence in the city, life experience, psychological characteristics, socio-professional orientation, production (working conditions, work organization, housing conditions, wages, growth opportunities, maturity industrial microclimate, etc.), factors that lie outside production (the system of vocational guidance and vocational selection, the system of training and distribution of personnel, the state with labor resources, level of development of social infrastructure (I.Vershina, I. Georgiev). It is emphasized that the success of the process of an employee's adaptation and organization depends on how quickly he/she accepts and determines own social role in the team, and how quickly norms and values of the team will become the norms and values of each employee.

Researchers distinguish two areas of psychological adaptation: primary, i.e the adaptation of young employees who do not have experience in professional work; secondary - the adaptation of employees in the transition to a new job or position.

There are also several stages of psychological adaptation distinguished in the degree of an employee's adaptation to the group: the initial stage is external reorientation, when an employee does not recognize the value of the group. The second stage – an employee and the group mutually recognize the system of standards of each other's behavior, but do not change their positions. The third stage - an employee adopts a system of values of the group, which at the same time under its influence changes its. The fourth stage is the final form of adaptation. When an employee internally fully takes value orientations, the norms of the group and completely rebuilds his/her psychology and behavior [6]. In our opinion, this is not entirely desirable, since an employee dissolves in the group and loses

some of its integrity. We emphasize that the adaptive abilities of an employee largely depend on the integrity of the psychological characteristics, qualities and properties of the personality that make up a person's potential. The higher the personal maturity, the higher the probability of successful adaptation. Psychological adaptation of an employee is often difficult and takes some time especially if the group, for some reason, is reserved and unfriendly. It contributes to the formation of an employee's active position in the framework of professional duties, the correct evaluation of the employee's social status and behavior based on it as one of numerous forms of development and realization of employee's opportunities in a new working environment.

Thus, we can draw the following **conclusions**:

1. Psychological adaptation is characterized by two components: procedural (interaction of a person and social environment) and resultant (adaptation), on the basis of which new personal qualities are formed (transition from the state of adaptation to the adapted person).

2. Personality in the process of psychological adaptation is characterized by activity: it can influence the environment in order to change it.

3. The adaptive activity of the personality is controlled and directed by the conscious goals, contributing to the formation of conscious regulation of behavior.

4. Adaptiveness of a personality is determined by psychological features of a person, and depends on a person's ability to overcome stressful influences on the basis of personal resources and social experience, as well as the ability to internalize the experience of others and social support.

5. Social and intrapersonal interaction is reflected in: adaptation to the environment - self-adaptation; transformation of the environment - self-transformation (N. Sarjeladze). An emotional condition plays an important part in intrapersonal interaction.

6. A key to the employees' psychological adaptation is the prevention of stress, affect, frustration.

7. The harmony of mental processes aimed at searching own project is the key to a person's successful implementation and adaptation. A psychologist, in particular an ontopsychologist, can significantly help an employee to get adapted by analyzing, according to A. Menegetti, «the integrity of a person's functionality (orderliness, health, ability to win) and the structure of a typical mental activity».

**The scientific novelty** of the study is in an attempt to specify the mechanisms of employees' psychological adaptation, based on different points of view, in particular, from the perspective of ontopsychology.

**The theoretical significance** of the research is in the analyzing the current trends in psychological science related to the problem of employees' adaptation in the working environment.

**The practical significance** of the paper is that the material of the article can be used in advisory and research practice, for further development of the topic.

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## INFORMATION CONCEPT OF FINANCE

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**Annotation.** *This work attempts to formulate an information concept of finance. Information is shown as an attribute of finance. Two levels of financial information are shown – they are the primary and secondary information, and relationships between the two levels of information are studied. The genesis of informational asymmetry of finance, the continuity of dualism “information exchange and movement of money capital”, peculiarities of value-information interaction are revealed. The existence of such a regularity in finances as information approximation is described.*

**Keywords:** *finances, information, functions of finance, value-information interaction, financial accounting, informational asymmetry.*

**Target Setting and Its Relevance.** In search of answers to challenges of financial crises since the late twentieth century, often reeling the national and world economy, questions to the finance science and practice reasonably raise about the genesis of information asymmetry of finance, the continuity of information exchange phenomena and movement of money capital, peculiarities of manifestation of value-information interaction – that is essentially finances – in the modern economy.

Despite the fact that modern society faces the imperfection of existing financial relationships, their lack of transparency and information asymmetry, it is important to realize that finances, being by their nature an objective institution of the society, have to function organically in it, not to generate destructive phenomena, but to provide sustainable development. Accordingly, we can conclude that the depth and frequency of financial crises, as well as their devastating effects, testify to the fact that (a) the essence of finance, their place and role in the economy and the society are not yet fully studied, and (b) the practice of financial relationships is not adequate to their objective social and economic purpose.

Development of the information society leads to rethinking of the already well-studied institution of finance (institution of financial infrastructure of the economy) from the standpoint of the phenomenon of information. Noteworthy that proponents of the theory of information asymmetry of finance, which laid foundations for a radically new analysis of markets and of corporate finance management in conditions of asymmetric information – American economists George Akerlof, Michael Spence and Joseph Eugene Stiglitz – became Nobel Prize winners in economics right in the beginning of the information XXI century – 2001.

The scientific approach from the point of view of understanding the decisive role of the phenomenon of information (information exchange) in the economic life of the society can reveal new aspects of objectively existing links and regularities in financial relationships, better understanding of the social and economic purpose of the institution

of finance. The result of this is, in particular, formation of the information concept of finance.

The information conception of finance is different from the current view of the system of value and money relationships. Investigating manifestation of the phenomenon of information in finances, it allows a new understanding of the essence of finance, their place and role in the economy of the information society.

Information (information exchange) is constantly present in finances (financial relationships). At the same time, the role of information in the economy of the information society is qualitatively different: it becomes an important economic resource, a factor in creation of added value. It contributes to development of information technology and its global distribution.

The attributive concept of information is fundamental in consideration of the essence of the information concept of finance. At one time, it was formulated in the study of the fundamental philosophical question: what is the original – idea or matter? Today, it is a key information concept, and modern physics and philosophy follow it fully. According to it, information is an attribute of matter, of everything that surrounds us. That is, information is immanent (inherent, internally inherent) for everything, including finances. While, “together with energy, it determines parameters of movement of the material world, manifesting in its orientation and creation of ordered forms of the existence of matter as a result of information interaction. All the interactions in the nature and the society are build on its basis” [1].

**Overview of Existing Research Topics.** Modern Ukrainian financial science has already certain achievements, where financial relationships are studied from the standpoint of the information concept. In particular, in the fundamental scientific work “Theory of Finance” (2010), prepared under the supervision of Professors of KNEU Viktor Fedosov and Serhii Yurii, the financial concepts of information asymmetry, existing in the economic science, are analysed [2]. There is also a series of works, devoted to the information aspect of corporate finance (Babichenko, 2014, 2015; Krysovaty, Fedosov and Ryazanova, 2013) [3; 4; 5; 6], which formulate key provisions of the concept of function of information of corporate finance. There are also studies, proving the immanence (attributiveness) of information to financial relationships at the macroeconomic level (Riazanova and Fedosov, 2017) [7].

**Research Results.** Finances are a special sphere of interaction in the society: it is a system of relationships, in which, and through which movement of money capital (value), its formation, distribution, accumulation and use take place in the economy. Financial relationships of participants of the economy are filled with information, or rather, the content of their financial relationships is precisely the information, which directly and (or) indirectly refers to movement of value, movement of money capital.

Consequently, the phenomenon of information (information exchange) is inseparable from finance (financial relationships). It is information that forms our perception of financial relationships: their nature, purpose, participants, peculiarities of movement of money capital, its structure, risks and other aspects. All this becomes known precisely

due to information, which, so to speak, “bears” financial relationships within itself of participants of the economy.

Based on the attributive concept of information, we can state that *information is an attribute (peculiarity) of financial relationships (i.e., finance, financial infrastructure of the economy)*.

According to the attributive concept of information, notions of the primary and secondary information differ. The primary is information, which, regardless of the will and consciousness of a person, objectively exists in the surrounding world. Perceived by a person, by technical means, and by any living creature, capable of seeing and decoding this information, it is represented as the secondary information.

The primary information cannot be measured, all measurements and calculations are carried out over the secondary information, actions in relation to which do not mean at all that the primary information is measured. In this case, the primary and secondary information exist in certain multidimensional dependencies: (i) the secondary information, characterizing peculiarities of the primary one, its structure and form, depends on it; (ii) having property, without loss of content, to recode repeatedly, transfer to other media and multiply, the secondary information does not depend on the primary one; (iii) the emergence of the new primary information occurs under the influence of the secondary and other primary information, and in this regard, the secondary and primary information are interdependent [1, P. 62-64].

Based on provisions, formulated by the attribute concept of the information, regarding the primary and secondary information, we can state that *financial information is also divided into the primary and secondary one. While, the primary information is an attribute of financial relationships. The human intelligence and technical means, perceiving and recording this primary information, form the secondary information*.

For a person, information about objects and processes is their reflection in the form of numbers, formulas, descriptions, drawings, symbols, images [8, P. 53-55]. The human intelligence processes the secondary information that is understood by a person according to its level of development, knowledge and ability to perceive information. The secondary information is presented to us by the data of statistics, accounting documents, financial reports, analytical materials, etc.

In finances, dependence between the primary information, carriers of which are financial relationships, and the secondary information, which is a result of fixing the primary information on a variety of media (human intelligence, human memory, paper, computer memory, etc.), is similar to that, which is formulated by the attributive concept of information. Thus, links between the primary and secondary financial information are characterized as follows:

(i) *the secondary financial information characterizes the primary one, its peculiarities, structure, and form, it depends on it;*

(ii) *the secondary financial information may, without loss of content, be repeatedly transferred to other media, multiplied, and therefore it does not depend to a certain extent on the primary one;*

*(iii) the new primary financial information appears under the influence of both the secondary one, and other primary financial information, in which the secondary and primary financial information is interdependent.*

In any link in financial relationships of the modern economy, we can find confirmation of manifestation of interdependence of the primary and secondary financial information. For example, new financial relationships of a participant in the economy (thus, the new primary information, which is carried by these relationships) may arise, when they attract the necessary money capital. This may be relationships under issuing securities or borrowing funds in the market of bank loans. But such relationships arise under the influence of the already existing secondary information, in particular, data of consultants, analysis of the financial market, potential lenders, investors and other topical issues. At the same time, relationships of this participant in the economy in terms of attraction of money capital are also influenced by other primary information, such as that contained in its new financial relationships with customers and suppliers (the very relationships with these customers and suppliers are likely to cause the participant to find money capital).

It is important to realize that *all the measurements and calculations under finances are made over the secondary information, which, describing peculiarities of the primary one, depends on it, but it is not a part of the primary information.* That is, in spite of the fact that in practice all the participants in the economy, of course, proceed from the fact that they use the complete information, in essence, various accounting documents, forms of reporting and analytical materials contain only that financial information, which human intelligence and various technical means have been capable, wanted and had the opportunity to record (that is, the secondary information), and not that, which has actually existed in the surrounding economic environment, in its financial relationships (that is, not the primary information).

There is plenty of evidence that, first, the society uses in its activities the secondary information on finance, which is not identical to the primary one, building its financial relationships in a proper way. Second, the level of adequacy of the secondary information to the primary one directly depends on human knowledge and the ability to perceive the primary information both by human intelligence, and by human-made media. Let us look at some of them.

In corporate finance, a vivid example of this is financial statements, which will definitely be further improved not only in form, but also from time to time in terms of content. Despite the fact that financial relationships of corporations are essentially the same at all the stages of development, covering economic relationships of corporations with other participants in the economy in the process of formation, distribution and use of their financial resources, accounting of financial information on corporate finances and reporting of corporations – have been changing. For example, Cash Flow Statement was adopted in countries with developed market economies only in 1950, and it was used in Ukraine only in the late 1990s. That is, in spite of the fact that information about cash flows has always been a component of economic relationships of corporations, only

in the middle of the XX century, the society realized the importance of assessing the financial condition of the company precisely on the basis of movement of its financial resources, and has begun to record and report appropriately such information.

Another example is the story of the balance of payments development, as a document that reflects the value break of the international relationships of the country. Such relationships, and therefore related flows of money capital, have existed since ancient times, and their essence does not change, only volumes grow and new forms of cash flows arise. At the same time, information on the international monetary capital movement became available to the public only at the end of the XI century, when the first attempts at accounting of international settlements were made in England. The very concept of “balance of payments” was introduced into the lexicon only in 1767 by Scottish economist James Denham-Steuart, a follower of mercantilism. That is, despite the fact that the international economic relationships were always an inherent value part, information about it was not accepted by the society for a long time, and therefore – was not used. And only with development of knowledge and technical capabilities, the society began to “extract” it from economic relationships and use information through the establishment of a proper accounting system.

Gradually, the system of the balance of payments was improved, which was accompanied by development of the practice of accounting for the international transactions and formation of the system of state bodies, which collect and analyse information on international money flow, among which: treasury, customs, budgetary and credit institutions. Over time, understanding of the society of the essence of the balance of payments changed, there was a need for comparing the international indicators and unifying methods of their compilation by different countries. It was only by the middle of the twentieth century that the balance of payments scheme was created, which the UN proposed to Member States to use in 1947. This scheme became the basis for further development by the International Monetary Fund (IMF) of the forms and principles of compiling the balance of payments. The process of developing the balance of payments and more accurate reflection by them of information on the international cash flow continues in the XXI century, and the IMF offers member countries new, improved schemes that contain deeper information – data on the international investment position [9]. Thus, by improving methods of drawing up the balances of payments, the society brings information, which it operates, closer to that, which is inherent in the international financial relationships. This is the basis of the effectiveness of the international finance, the international trade, and other types of foreign economic activities of countries.

In the sphere of the state finance, particularly in the budgetary practice, there is evidence of a “gap” between the secondary and primary information. For example, in Ukraine, unfortunately, the practice of numerous revisions and clarifications of the state and local budgets after their official approval by the law has become traditional. It is based not only on the unpredictable nature of the dynamics of the national and international economy and politics, but also to a large extent that the initial financial data for development of these budgets from the very beginning does not correspond to the real

state of affairs. For example, information that is fixed by the tax accounting of taxpayers and the relevant accounting systems of the state tax authorities, and used in formation of the revenue part of the budget, does not fully reflect information, which is actually borne by financial relationships of taxpayers and the state. Verifications, clarifications and other actions regarding collected tax information are all the steps, which reflect the desire to bring operational tax information (the secondary one) closer to information that really exists in financial relationships of taxpayers (the primary information).

Participants in the economy form their own judgement on finances, based on information they have at their disposal. At the same time, development of participants in the economy and the society as a whole is directly determined by the extent, how financial information they operate (the secondary information) is adequate to that, which is actually carried by financial relationships (the primary information). We believe that this is confirmed by the fact that in more developed economies, the gap between information, contained in financial relationships, and that perceived by man and technical means, is lower than in the rest of the countries. For example, the financial information database (financial statistics) in the United States, the United Kingdom and other economically developed countries is much more complete than in many other less developed countries. It is a prerequisite for the social and economic progress of developed economies and the result of a high level of their development. *The adequacy of the secondary financial information to the primary one, as well as the level of human perception and understanding of the existence of both levels of financial information, are key issues in ensuring the quality and efficiency of information exchange in finances.*

The phenomena of the primary and secondary information are directly related to information asymmetry of finance. The basis of information asymmetry is, first of all, that the secondary information is not identical to the primary one. In addition, the existing secondary information can be perceived by users in different ways. Finally, differences in interests and human factors can cause distortion of information by individual members of financial relationships. The discrepancy of the secondary information, compared to the primary one, leads to the fact that the new financial information, generated by such inadequate secondary information, carries new false data.

Despite the fact that today in the society, there are factors of asymmetry of financial information, according to the author, one can also distinguish another provision in the information concept of finance: *regularity of the modern information society is information approximation of participants in the economy.* This is a manifestation of the law of unity and struggle of opposites. That is, information asymmetry and information approximation in finances exist at the same time, but the first is usually ahead of the second one. We believe that with the further development of the information society and its advanced information technology and human knowledge – the gap between the primary and secondary information in finance will decrease and the level of understanding and perception by human-made technical means – will grow. Already today in the society at all the levels – in the state, in the business environment, among the population – recognition of the need for openness of financial information, its

accessibility and comprehensibility to the general public, is growing. The civil society is emerging, demands for transparency and quality of disclosure are increasing.

Development of the information economy and its financial infrastructure are objectively accompanied by the process of raising the level of adequacy of the secondary information of finance to the primary one. In financial relationships, as opposed to the phenomenon of asymmetry of information, the process of information approximation is gradually increasing. *This is a logical, causal-consequential, that is, expected process that can be conventionally defined as the law of information approximation.* In our opinion, *the law of information approximation in financial relationships is of an asymptotic nature.* Such a vision is based on understanding of the postulate of the attribute concept of information, the essence of which is that the primary information cannot be measured. That is, with the development of the information society, there is a process of maximum approximation of the secondary information of finance to the primary one, but, at the same time, the complete correspondence of the secondary information to the primary one does not occur.

Summarizing the above, the essence of the information concept of finance can be formulated in a number of provisions.

*(1) Information, being an attribute (peculiarity) of finance, is divided into the primary information (full) and the secondary one, which is the result of perception of the primary information by human intelligence and a variety of technical means.*

*(2) There are regular connections between the primary and secondary information.*

*(3) Participants in the economy operate only with the secondary information, which, coming closer to the original, is not identical to it.*

*(4) The gap between the secondary and primary financial information is an informational uncertainty. It is the basis of probability and risks in finance and the economy as a whole. As the secondary information is brought closer to the primary one, uncertainty decreases, and hence the risks.*

Finance, being an infrastructure component of the economy, provides economic activities of the society and affect other areas of its life. Therefore, an important aspect of the information concept of finance is the position regarding their objective social and economic purpose (i.e., objective functions). An adequate understanding of the objective purpose of finance is an indispensable condition for the success of financial practice in the information economy: it refers to both authority structures, and business circles, and the general population.

To date, in the Ukrainian financial science, the view that the state and local finances are objectively inherent in two functions – distributive and control, prevails (4, P. 8-10; 10; 11; 12; 13, S. 15-29; 14]. Distribution function is recognized as the main one and is defined as being manifested in the distribution and redistribution of the value of the social product. Control function is considered to be due to the objective ability of finance to quantitatively reflect the distribution and redistribution of the social product in value terms. It manifests itself in the course of monitoring the distribution and redistribution

of the social product according to the intended purpose. A number of Ukrainian scholars believe that the following functions are inherent in finances: regulatory, stimulating, reproductive, stabilizing.

In a particular modification, distribution and control functions are considered as inherent in other spheres of financial relationships, in particular, corporate finance. For example, the following three functions of corporate finance are distinguished: capital formation of corporations, that is, attraction of capital from the financial market; distribution and use of capital, i.e. investment in accordance with business plans of the corporation; control over formation, distribution and use of capital [15, P.12-19, 20-26].

Despite the fact that the modern financial science has thoroughly studied the essential aspects of finance, we believe that the information concept of finance allows to discover new facets in them. After all, recognition of information as an integral attribute of financial relationships logically brings us to the issue of the existence of objective interactions between movement of capital (value) and the phenomenon of information. Therefore, it is necessary to find out peculiarities of manifestation of these interactions.

First of all, we recall the existence of interaction of information in the dualism of “energy-information”, the objectivity of which is recognized by modern physics and philosophy. Energy<sup>1</sup> is understood as the only measure of different forms of motion and interaction of matter, measure of transition of motion of matter from one form to another. This is a scalar (from the Latin scalar is – stepped) physical quantity, that is, one whose each value can be represented by one real figure. Along with such quantities as length, area, time and temperature, value can be classified as scalar. The concept of energy is related to the ability of a physical body or a system to perform work, while such a body or a system partially lose energy, spending it on changes in surrounding bodies [16]. Energy does not arise from anything and does not disappear anywhere, it can only move from one state to another, and, due to the existence of this conservation law, the concept of “energy” combines all the phenomena of the nature. Energy information exchange is everywhere, in everything, providing and linking the existence of everything.

We believe that in the economy analogy to the concept of energy is the concept of value (money capital). The identity of these concepts is already recognized to some extent, in particular, by some representatives of the Ukrainian economic sciences who appeal to the concept of “energy of capital” [17]. Like energy, value (money capital) is in constant motion, it is formed, distributed, transmitted, accumulated, invested and used. In economic relationships of the society, the very value (money capital) is a universal measure of everything during creation, distribution, exchange, accumulation, investment and use.

Exploring from the standpoint of the information concept of finance the issue of the objective social and economic purpose of the institution of finance (financial infrastructure of the economy), it is important to briefly focus on the relationship of such

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<sup>1</sup> The concept of “energy” was introduced by Ancient Greek philosopher Aristotle in his treatise “Physics”, where physics was first viewed not as a doctrine of the nature, but as a science of motion. In ancient Greece, this concept meant action, activity, strength and power.

key concepts for finance and the economy as value and money capital.

According to the philosophy, “everything in the world exists in constant motion, interaction and flow of forms in the content, and then again in form. The content of one phenomenon is simultaneously a form of another, and this form, in its turn, is the content of another phenomenon” [18, P.199-207]. *The phenomenon of value and the phenomenon of money capital are interconnected as content and form, and they are links of a single chain of flow of social and economic relationships of the phenomena of content and forms.*

That is, value is an essential (meaningful) category and is inherent in everything, which is included in the human being in the economic space (circulation). Then, value flows into money capital, which, being a form in relation to value, is, in its turn, content of financial relationships. Financial relationships (finance), being a form in relation to money capital, are, in their turn, content of economic relationships. Economic relations, being a form in relation to finance, form content of human relationships in the society. In addition, for the purpose of carrying out commodity exchange operations in the economy, there is a need to determine value (price) of money capital, and here value is a form, and money capital is its content. Every link in this chain is necessary, and value is a universal measure of everything in the field of economic relationships of the society, measure of various forms of movement of factors of production, their transition from one form to another. In this case, for the quantitative expression of value, the society uses both absolute values in certain currency units and relative ones (for example, interest).

We believe that the key concepts in the study of the objective social and economic purpose of finance are value and information. It is within the limits of financial relationships that movement of value (money capital) takes place, and content of these relationships is information that directly and (or) indirectly relates to movement of value (monetary capital).

It is logical to conclude that *the objective purpose of finance as being a security, infrastructure subsystem for the economy of the society, is, first of all, the provision of movement of value (money capital) at all the stages. While the process of value movement is a logical sequential cycle that encompasses not only movement as such, but also formation (creation) of value, its distribution, accumulation, investment and use. These processes are possible only in conjunction with information exchange between participants in the economy, that is, in the existence of value-information dualism*”. Thus, *the objective public purpose of finance is to implement two functions – value and information.*

In the Ukrainian financial science, the idea of the existence of value function was first formulated by Professor V. Fedosov [5]. After studying the essence of corporate finance through the prism of their connection with the fundamental definition of “capital”, he substantiated the value-formation function in corporate finance. Its essence lies in the fact that corporate finance enables such a movement of capital value, in which conditions of rising value are formed. The author of this article shares completely this point of view.

We believe that finances as an integral institution of the society (financial infrastructure

of the economy) is inherent, first and foremost, as value function. *The essence of value function of finance is that it is in the course of (within the limits) financial relationships in the economy that the movement of value, its formation (creation), distribution, accumulation, investment and use occurs.*

Based on the theory of institutionalization, the general architecture of finance (financial infrastructure of the economy) can be represented as a set of segments such as: household finances, corporate finances, state and local finances, as well as financial markets and international finance. Each of these spheres of financial relationships there is a movement of value as such, as well as there are absolutely all the stages of the cycle of value movement – its formation (creation), distribution, accumulation, investment and use. At the same time, each sphere of financial relationships has characteristic peculiarities that determine their place and role in provision of value movement (monetary capital) in the economy. In each sphere of finance, only one or several stages of the overall cycle of value of money dominate, and they determine the main (but not the only) objective value purpose of this subsystem of finance. Taken as a whole, all the spheres of financial relationships represent a single system that provides a complete cycle of value movement in the economy.

In corporate finance, the stage of formation (creation) of value prevails, so value function here is represented predominantly by value-formation function, which has already been described by the Ukrainian financial science and is that financial relationships of the corporation enable movement and growth of exchange value of capital. Regarding the state and local finances, prevalence is taken by *value-distribution function*<sup>2</sup>. Its essence is a similar to distributive function of finance, which has been thoroughly investigated by the Ukrainian financial science.

The financial market sphere differs from corporate finance and the state, and local finances in that it has simultaneously several stages of value movement, which prevail. Therefore, the financial market is objectively characterized by the following functions: value-saving, value-investment and value-price.

Taken the overall value-saving and value-investment functions can be combined into value-mobilization function of the financial market. Details of these functions were already described by the author earlier [19]. *Value-accumulation function* is that the market accumulates money capital, which its participants offer for further investment. This, for example, occurs in the course of accumulation of money capital by banks on deposit accounts of their depositors. Or, when institutional investors – non-state pension funds, insurance companies, joint investment institutions (corporate and unit investment funds) – accumulate money capital of their clients. . This is an extremely important function, because due to its small amount of money, capital can be transformed by financial intermediaries into large volumes of investment, required by issuers and borrowers. In addition, by implementing value-accumulation function,

<sup>2</sup> Since certain spheres of financial relationships are important to be seen as constituting a single integral financial infrastructure of the economy, then functions of each sphere, having the same roots, are logically to be defined by with single-word phrases.

the financial market accumulates a different by time money capital, which can then be transformed into long-term investments. The main source of accumulation is savings of households. *Value-investment function* of the financial market is to enable the market to place accumulated money capital. When implementing value-investment function, the financial market should ensure movement of money capital towards higher returns and minimize risks, that is, invest in the most effective projects.

As for value-price function, the society needs information about value (price) of money capital for the provision of commodity exchange in the economy. Therefore, another value function of the financial market is value-price function, which is implemented in the course of performing the first two functions – value-accumulation and value-investment functions. The essence of *value-price function* of the financial market is that the price of money capital is determined and fixed in this market. Given this, the society has the ability to digitize (express) prices and price proportions between the rest of the goods and services. Information on the state of formation of prices in the financial market – the state of affairs of the financial market – in the modern economy belongs to the main one in analytical materials and forecasts of development of the national and world economy. An example of such information is stock indices that generalize the dynamics of prices for money capital (securities).

These three functions of the financial market are interconnected and implemented practically simultaneously (in parallel). At the same time, while implementing value-accumulation, value-investment and value-price functions, the financial market simultaneously plays a unique role in ensuring value movement as such. At the present stage, the volume of capital movement in the economy is estimated, in particular, by data on the level of capitalization of the stock market. This data indicates the volume of the market, but taken in the dynamics, allows to assess the qualitative side of functioning of the market.

In addition to value function, finance also performs objectively an information function. Information is an attribute of financial relationships, their content. Value function of finance, as well as the corresponding value functions of each of the spheres of financial relationships, can only be realized simultaneously with the relevant information exchange. That is *the dualism of value-information is embodied in interaction of value and information function of finance*. After all, due to the fact that financial relationships carry information about value break of economic relationships, between their participants, the processes of movement of value, its formation, distribution, etc. are possible. The fact that all the stages of value movement need to have the relevant information is indisputable. It is information function that serves the basis for the ability of the society to evaluate flows of monetary values, analyse, plan and control them. *The essence of information function of finance lies in the fact that financial relationships always carry information that directly and (or) indirectly relates to value (money capital)*. This information is about movement, formation, distribution, accumulation, investment and use of value (money capital). On the price characteristics of money capital, its physical structure, owners, sources, directions and other aspects of movement of value in the economy.

The objective purpose of information function of finance is to reduce uncertainty (unpredictability) in the economy in matters, relating to movement of value (money capital). Information asymmetry of finance is one of manifestations of uncertainty in finances. Information function of finance is realized during registration, accumulation, processing, preparation of the relevant information for users and their subsequent actions with information received. Proper information and its effective exchange is an indispensable prerequisite for minimizing risks, sustainable financial and economic development.

We believe that information function is objectively inherent in both the general institution of finance and all its subsystems. In this case, the essence and manifestation of information function in corporate finance are already described by the Ukrainian financial science [5]. The information public purpose of corporate finance is that financial relationships of corporations, “bearing” in themselves data that directly and (or) indirectly relates to movement of value (money capital), thereby enable this movement, provide formation (creation) of value, its distribution, transfer, accumulation, investment and use.

Information function is clearly manifested in functioning of the financial market, which is marked by the financial science and practice. In particular, one of the fundamental provisions of the modern theory of the financial market is the hypothesis of an efficient market, formulated in the late 1970s, which is essentially entirely based on the information concept. Its author is American economist Eugene F. Fama, who became the winner of the Nobel Prize in Economics in 2013. According to this theory, all the relevant information is immediately and fully reflected in prices of its financial instruments in the efficient market. At the same time, depending on the availability of information to market participants and its reflection in prices, the financial market is classified into three levels of efficiency. (1) The weak-form efficiency market, when current market prices are based only on historical information, that is, past information about its prices. (2) The semi-strong efficiency market – formation of current prices takes place according to historical information on prices and all the public information that is relevant and can relate to financial market prices. (3) The strong-form efficiency market, where prices are the result of decisions of market participants, taken under the influence of not only historical information on prices and all the public information, but also on the basis of information with limited access – insider information. That is, the basis of the hypothesis of E. Fama is essential recognition that information component is inherent in the financial market relationships, but the problem is that information is not fully recorded and used by the market participants.

Value and information functions of finance exist in interaction, and value-information links permeate and connect the economy of the society, ensuring its functioning. That is why – in terms of the theory of institutionalization – the institution of finance is a security, infrastructure subsystem of the economy. It is important to note that *value-information relationships, being objective in essence, in the real economic life of the society are extremely subjective*. That is, *in real economic relationships in the objective*

*dualism of “value-information” so to speak, dissonance (divergence) arises.*

Dissonance in value-information relationships manifests itself in the fact that information on movement of value (monetary capital) does not correspond to reality, does not reflect the real state of movement of value (money capital) in the economy. This is essentially a manifestation of the above-discussed situation regarding the difference in the secondary information in finances from the primary one. The reason for this lies in human factor: (i) insufficient level of financial and economic literacy of the society, (ii) mistakes, (iii) as well as financial selfishness of participants in the economy. The essence of the latter is the desire of individual participants in the economy to receive financial benefits at the expense of others, often to the detriment of others, for which they conceal truthful information. In addition, (iv) participants in the economy often use imperfect technical means of recording and processing information, which also contribute to the discrepancy in the value-information dualism.

In the real economic life of the society, the situation of the financial market, when its participants perform virtual transactions with money capital, can serve as a vivid example of such dissonances. On this occasion, George Soros, in the book “The Crisis of Global Capitalism. Open Society Endangered” (1999) [20], writes that the scale of swap markets, forward transactions and derivative securities is enormous and margins are very small, and therefore amounts, with which operations are carried out, are many times higher than the capital, actually used in commercial activities. Such dissonances underlie the phenomena, described by the notion of the “financial bubble” now familiar to us, as well as the global financial crises of the late 20th and early 21st centuries.

To minimize the dissonance (discrepancies) described above in the architecture of the financial infrastructure of the economy, there is an objective information subsystem that rapidly develops in the information society. It takes on the greatest relevance and development from the end of the XX - the beginning of the XXI centuries, since, as G. Soros, in the book “Alchemy of Finance” (2007) [21], states that one of the postulates of finance of the information age is that the simple understanding of the situation by its participants is not sufficient and can not be regarded as knowledge: in finances, the completeness of information is important.

**Conclusions.** The information concept of finance, revealing the existence of two levels of information, inseparable value-information interaction in the economy and the objectivity of information approximation, which exists along with information asymmetry, reveals new facets of the institution of finance (financial infrastructure of the economy). With development of the information society, when the role of information as an economic resource and the factor of added value increases, these provisions of the information concept of finance are extremely relevant. They form the basis for understanding the objectivity of the processes of disclosure of information and transparency of finance, the need for development of an information subsystem of finance – financial accounting. Based on the provisions of this concept, one can better understand the nature and essence of financial crises, and thus minimize their probability and ensure sustainable economic development of the society. These questions are subject

of an individual research.

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## PROBLEMS OF INVESTMENT PORTFOLIO OPTIMIZING OF INSURANCE ORGANIZATION

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**Annotation.** *Methodological problems of insurance organization investment portfolio management, optimization and forming have been discussed. Main functions and principles of insurance organization investment portfolio forming have been analyzed. Визначено основні етапи формування оптимального інвестиційного портфеля. The stochastic approach for profitability estimation has been proposed. Markowitz' model for insurance organization NJSIC «Oranta» investment portfolio optimization have been used.*

**Keywords:** *insurance organization investment portfolio, investment portfolio structure optimization, insurance portfolio management.*

Insurance firms constitute one of the major segments of financial system in all economies of the world. As financial institutions, they are involved in financial intermediation; mobilizing financial resources and channeling them into the economy for productive uses.

Particular qualities of insurance companies participation in investment processes are connected with insurers' double nature.

From the one hand, insurance companies possess large amount of investment resources, from the other - as subjects guarantee the defrayal of certain possible unfavorable losses as a consequence of undesirable factors influence on investment activity. As for another aspect, that is the main destination of insurance companies as participators of financial market.

Thus, by insurance companies investment activity implementation it is necessary to consider the close interconnection between insurance and investment activity, the «secondary character» of the investment activity on Ukrainian insurance market with respect to insurance activity and clearly regulation of domestic insurers' investment activity. Therefore the insurance companies investment portfolio forming and optimization problem is very important.

As institutional investors, insurance companies are among the most important participants in the financial market, especially in the capital market. One of the important factors that determine the structure of investments of insurance companies in the world, certainly are the level of development of financial markets in a country, because if the capital market is more developed, there are more high quality paper and as more investors to invest in it.

Therefore, when making investment decisions in the types of assets will qualify for

the funds, portfolio managers must take into account the safety of those investments. If the insurance companies own the remaining funds invested in high-risk assets would be uncertainty about the fulfillment of their basic functions. For this reason, insurance companies have to sell their assets primarily in low risk assets.

One can define the main tasks of insurance company investment portfolio management:

- ensuring higher pace of economical development of insurance company due to effective investment activity;
- ensuring the maximum profit. In the presence of some alternatives, the most profitable is chosen which secure the acceptable risk ratio;
- ensuring the investment risk minimization. By unfavorable conditions on financial market risks may cause not only investment profit loss but negative consequences in insurance activity performance because the most part of invested capital of insurance company is the debt capital formed at the expense of insurance resources;
- ensuring financial stability and solvency of insurance company during investment activity implementation.

Investment activity is connected with financial resources withdrawal from insurance company turnover, that may cause reducing of insurer's solvency on revenue expenditures. Most insurance company investments is accomplished at the expense of debt capital, and that is why their influence on financial stability and solvency of insurance company must be forecasted beforehand.

Insurance company investment portfolio is characterised by certain peculiarities:

- high portfolio liquidity connected with character of debt capital and insurance assets liquidity legislation claims;
- low risk ratio due to clearly defined restrictions of insurer financial resources investment;
- portfolio forming at the expense of debt capital as well as own capital that allows to control profitability ratio of insurance company investment portfolio;
- medium-dated and long-dated nature of investments.

The functions of insurance companies as portfolio investors could be defined in such a way [2]:

- individual investors financial resources mobilization into insurance fund and their transformation into investment capital;
- accumulate and own funds investment in legislative resolved assets;
- balancing of capital market demand and proposition by financial resources redistribution between suppliers and customers of investment capital;
- investment risks diversification;
- arrangement of conditions for liquidity increasing by professional asset managers facilities attraction.

The aim of insurance company investment portfolio is to obtain maximal investment profit on the assumption of general restrictions observance by all financial market participants:

- 1) financial tools usage restrictions;
- 2) asset investment process state regulation and control;
- 3) the necessity of well-grounded investment of own funds considering investor' financial state;
- 4) investment portfolio liabilities structure peculiarities;
- 5) the necessity of availability of certain volume of high- liquidity assets with the purpose of insurance company badly quantitative analysed risks liabilities performance;
- 6) the experience of actuaries and analitic managers with the purpose of insurance company investment portfolio certain ratio security ensuring [3].

The basis of legislative support of insurance reserves investment is the Law of Ukraine «About insurance», the Rules of formatting, accounting and investment of insurance reserves of non-life insurance and the Rules of formatting, accounting and investment of insurance reserves of life insurance.

Insurance recourse investment considering current legislation claims means upholding of legislative: 1) investment directions; 2) investment principles; 3) investment norms. Moreover, insurance law determines the main principles of means of insurance resources investment as: security, liquidity, profitability and diversification.

The asset structure of NJSIC «Oranta» presented the insurance reserves is represented in table 1.

Table 1

**The asset structure of NJSIC «Oranta»**

Asset	Asset structure, %		
	2014	2015	2016
Costs on account current	12,4	12,4	13,2
Bank deposit (UAH)	33,3	38,8	35,1
Metals	1,4	1,3	1,2
immovable property	2	1,2	2,2
Shares	35,4	29,4	39,5
Mortgage deeds	0,1	0,2	0,3
State securities	2,3	2,4	2,7
Claims to reinsurers	12,9	14,2	5,8
Investments in Ukrainian national economy resolved by cabinet	0,3	0,3	0,3
Cash	0,1	0,1	0,00
Total	100,0	100,0	100,0

Source: [4]

With the purpose of practical recommendations of insurance organization investment portfolio formation the effective portfolio of permissible risk of NJSIC «Oranta» using Markowitz' theory has been calculated. As main indices the model uses yield and risk which completely could be calculated for certain portfolio tools.

Risk is a probabilistic valuation, its quantitative estimation couldn't be unequivocal and clearly predictable. Depending on realized calculation methodic the risk value could appreciably change. The main methods of risk estimation are realized in practice: conjuncture sensitivity estimation and probable profitability distribution estimation [5]. The first approach consists in risk calculation as asset profitability variation spread (V), on the assumption of pessimistic ( $R_{\Pi}$ ) and optimistic ( $R_{\text{оп}}$ ) profitability estimation. Profitability variation spread acts as risk measure (range of profitability change) associates with certain financial asset:

$$V = R_{\text{оп}} - R_{\Pi} \tag{1}$$

The more is the expected profitability change spread (range) from the lowest to highest value, the more is the risk. Some experts are convinced, that only alternatives characterised by risk less than expected ratio should be taken into account by investors.

For second approach the initial indices are of financial asects profitability forecasting estimation ( $R_i$ ) and their probabilities ( $P_i$ ). The most widespread risk measure is dispersion or standard deviation of expected profitability. [5]. The possibility of certain incident forecasting with highest probability allows to elaborate risk counteraction strategy plan. The ratio of risk value and yield is estimated using statistic methods, probability allows to obtain the quantitative risk characteristics.

The stochastic approach defines not the probability of certain loss value but the probability that loss value will not exceed certain established value is defined.

Let's consider stochastic approach to risk value of insurance organization investment tool estimation. Let assume that the ranged sample of certain financial tools yield values (%) based on previous years' activity results is known:

$$X_1, X_2, X_3 \dots X_n \tag{2}$$

where n – sample number.

Sample is considered to be ranged if  $X_1 \leq X_2 \leq X_3 \leq \dots \leq X_n$

Using the results of the sample has been built the interval row of relative frequencies calculated by formula:

$$W_i = \frac{m_i}{n} \tag{3}$$

Where  $m_i$  – number of values  $X_i$  lied in  $i$ -th interval. The results are presented in the Table 2:

Table 2

Relative frequencies					
Intervals	$[X_1; X_2)$	$(X_2; X_3)$	$(X_3; X_4)$	...	$(X_{n-1}; X_n]$
$W_i$	$W_1$	$W_2$	$W_3$	...	$W_n$

Let  $\Delta_i$  is the interval length. Thus based on  $i$ -th interval the rectangle was built whose area is equal to  $W_i$ , and its altitude is  $h_i = W_i / \Delta_i$ . As a result the stepped figure – the distribution histogram as the analogue of empirical probability density has been obtained [6].

The problem is to define frequency distribution using sample data. For specific sample the hypothetical distribution function  $F(x)$  has been chosen and choice verification using goodness of fit  $\chi^2$  [6] has been performed. If the hypothesis of hypothetical distribution function  $F(x)$  choice adequacy is confirmed, the value of risk could be defined. On the assumption of known distribution law  $F(x)$  (or  $f(x)$ ), the probability that investment yield will be less than given yield value  $R$ , could be found from

$$P = \int_{-\infty}^R f(x) dx \tag{4}$$

It should be noted that not all investment pattern could be estimated in correspondent manner and actually their employment in optimal investment portfolio formation is incorrect [3]. Thus in structure of assets represents insurance resources the considerable segment of claims to reinsurers is emphasized. This asset is not a financial tool and only determines the value of insurance resources which could be paid by reinsurer in case of insurance incident approach. That is why such group of assets have not been taken into account by optimal investment portfolio calculation. Moreover it turned out that the mean yield of immovable property is negative and also have not been included into calculation as long as its weight in process of optimization would be equal to zero.

Costs on account current and cash have not been included into analysis because they are characterized by almost zero profitability and are intended to ensure only current liquidity of the insurer. Mortgage deeds and investments in Ukrainian national economy resolved by cabinet have low weight in total portfolio (total – 0,6%) and have not been taken into account because of profitability calculation complication. Industrial

bonds haven't been analysed on account of large number of bond issuers and issue conditions variety. Furthermore their slight weight in real resources portfolio and low demand during crisis period essentially complicate the adequate analysis of industrial bonds profitability. Certainly, industrial bonds are perspective investment pattern but nevertheless it is more reasonable to implement such investment on economy growth stage.

Thus obtained indices of insurers resources portfolio patterns mean profitability have been used in Markowitz' model [7] shaped in the form of formula 5:

$$\left\{ \begin{array}{l} \sum_{i=1}^N w_i r_i \rightarrow \max \\ \sqrt{\sum_{a=1}^N \sum_{b=1}^N (w_a w_b \text{cov}_{ab})} \leq y_{req} \\ 0 \leq w_i \leq 1 \\ \sum w_i = 1, \end{array} \right. \quad (5)$$

where  $w_i$  – weight of  $i$ -th tool in insurance resources portfolio;

$r_i$  - profitability of  $i$ -th tool;

$N$  - tools number;

$\text{cov}_{ab}$  – covariation between pairs of different tools;

$y_{req}$  - maximum permissible risk of insurance resources portfolio.

The model has been realized using intrinsic functions of MS Excel 2010. The statistical data of asset value has been used [8]. Obtained results are represented in table 3 and table 4.

Table 3

**Calculated ratios of risk and profitability**

Asset	Profitability, %	Risk, %
Bank deposit (UAH)	12,4	4,8
Metals	22,1	65,9
Shares	37,3	201,8
State bonds	11,9	4,4

[own development]

Table 4

**Optimal ratio of analyzed assets in investment portfolio, %**

Asset	Optimal portfolio, %
Costs on account current	13,75
Bank deposit (UAH)	44,59
Metals	7,75
Immovable property	0
Shares	14,05
State bonds	4,77
Claims to reinsurers	15
Cash	0,09
Total	100

[own development]

Comparing the calculated structure of optimal investment portfolio with real data of NJSIC «Oranta» assets investment one could resume:

1. Investment portfolio is insufficiently filled by bank deposit (UAH). This leads to income deficiency since deposit interest in UAH is higher. Though deposits in foreign currency are not in the least represented in portfolio. Thus such portfolio is not enough protected from currency risks.

2. Shares of Ukrainian issuers increase total portfolio risk, whose weight exceeds optimal ratio. Having enough high profitability, at the expense of market value fluctuations and correspondent risk ratio, shares needs careful analysis while choosing concrete issuer.

3. State bonds are not paid enough attention by NJSIC «Oranta», though they are enough profitable and from the other hand - ultrareliable, that is optimal by criteria «risk - profitability».

4. Insufficiency of metals as high-risky but highly remunerative asset in investment portfolio of NJSIC «Oranta» leads to loss of possible profit. From the point of profitability forecasting the metals are the most complicated asset. Though in short-term outlook, in phase of financial market reviving when, as a rule, metals rise in price, such investment could be advantageous on the assumption of quick profit fixation.

5. As for investments in Ukrainian national economy, it should be noted the existing of great problem for our country.

Insurance company investment portfolio optimization should be performed permanently and should be based on systematic monitoring, using statistical data and mathematical methods and on portfolio structure diversification.

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## ЭКОЛОГИЗАЦИЯ ПРЕДПРИЯТИЙ ТУРИСТИЧЕСКОГО И ГОСТИНИЧНО-РЕСТОРАННОГО БИЗНЕСА ХЕРСОНСКОЙ ОБЛАСТИ

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*Serbenivska A. Ecologization of touristic and hotel-restaurant business companies in Kherson region.*

*Annotation. In the article was examined European experience of hotel-restaurant business companies ecologization and also ecologic management application in Kherson region. The natural-geographical, historical-cultural, natural-anthropogenic tourist resources are reflected. The main causes of the deterioration of the ecological state in the coastal regions of the Kherson region are specified.*

*Keywords: Ecological management, hotel-restaurant business, recreational-touristic complexes.*

Туризм для Украины является сравнительно новой и, соответственно, не особенно развитой сферой деятельности. Однако, последние пять лет произошло резкое увеличение туристической деятельности, причем не только международной, но и ориентированной на рекреационно-туристические комплексы Украины. Основными причинами, вызвавшими такое оживление, являются Евроинтеграционный курс развития (увеличилось количество туристов, не только выезжающих с Украины, но и иностранных туристов посещающих нашу страну), а также потеря курортных зон на полуострове Крым, что привело к увеличению потока туристов в Херсонскую область. В 2017 году побережье Херсонской области посетило 3,1 млн. туристов, а Крымский полуостров около 400 тысяч отдыхающих. Такой всплеск внутреннего туризма с одной стороны является положительным моментом, способствует увеличению доходов, стимулирует развитие гостиничного и ресторанного бизнеса и, соответственно, экономическому развитию региона и страны в целом. С другой, повышается нагрузка на природные комплексы, увеличивая риск снижения качества окружающей среды.

Херсонскую область можно охарактеризовать как регион со значительной территориальной дифференциацией отдельных городов и районов. Это вызвано географическими особенностями, значительным потенциалом как природно-антропогенных, так и историко-культурных ресурсов. К наиболее значимым природно-антропогенным туристическим ресурсам можно отнести биосферный заповедник «Аскания-нова» им. Ф.Е. Фальц-Фейна (Чаплынский район Херсонской области). В наше время заповедник «Аскания-нова» остается наибольшим научным, экологообразовательным центром юга Украины, экскурсионная деятельность которого достигает 140 тыс. туристов в год. Неотъемлемой

частью природно-рекреационного потенциала региона является Джарилгач - остров в Каркинитском заливе Черного моря (наибольший остров Украины). Административно принадлежат к Скадовскому району Херсонской области. Вся территория острова и часть прилегающей акватории входит в Национальный природный парк «Джарилгацкий». [1]

Следующим природно-антропогенным ресурсом можно назвать Черноморское побережье Херсонской области, в том числе г. Скадовск, детский курорт государственного значения в селе Лазурном. С современными территориями Садовского и Голопристанского районов связано немало исторических фактов и событий, которые являются потенциально интересными для туристов. Вдоль побережья расположены многочисленные пансионаты, базы отдыха, детские оздоровительные лагеря, Черноморский биосферный заповедник, Ягорлицкий орнитологический заказник, целебные грязи и рапа озера Соляное, базы сельского зеленого туризма. Особенностью региона является отсутствие промышленных зон, чистая вода, уникальный климат. [2]

Последнее время активизировалась работа по использованию туристического потенциала для организации и проведение рекламной компании, продвижения Херсонской области как рекреационного региона, популяризации рекреационных возможностей областной государственной администрацией. Было проведено большое количество мероприятий. К наиболее значимым можно отнести создание и постоянное обновление информационно-поисковой системы «Радушная Херсонщина», предоставление информации о туристическом потенциале области, разработка туристических маршрутов(например, «Казацкими дорогами Херсонщины», в которые входят 4 туристических объекта: первая летопись о казаках (с. Тягинка), Бизюков Монастырь (с. Красный Маяк), Каменская Сечь (с. Республиканец), скифские курганы (с. Качкаровка)), участие в международных и национальных рекламных мероприятиях, организация специализированных ежегодных выставок «Херсонщина туристическая», проведение фестивалей «Мельпомена Таврии» (г. Херсон), «Купальские звезды» и «Арбузного» (г.Голая Пристань). Кроме того, за последние годы благодаря государственной поддержке на Херсонщине была издана специальная полиграфическая продукция(буклеты): «Приглашает херсонское село», «Рыбалка и охота на Херсонщине», «Гостиницы Херсонщины», «Олешковские пески», «Отдых», «Уникальная Херсонщина», «Зеленые хутора Таврии», «Оберег Херсонщины». [3]

Историко-культурные туристско-рекреационные ресурсы Херсонщины богаты и уникальны. Это подтверждает, во-первых, их принадлежность к разным историческим эпохам - от находок самых древних стоянок до свидетельств о культуре киммерийцев, скифов, сарматов, греков; древних славян; запорожских казаков, татар, турков, россиян. Во-вторых, только на этой территории взаимодействуют и сменяют друг друга Скифское царство, греческие колонии-города, славянские поселения, Запорожская (Каменская) Сечь и Крымское ханство, Османская и Российская империи. Наибольшими историко-культурными

туристическими ресурсами, где практически представлены все исторические эпохи, владеют непосредственно близкие в Днепр Нововоронцовки, Белозерский, Верхнерогачицкий, Горностаевский, Великолепетихский, Каховский, Цюрупинский, Голопристанский районы. Курганные достопримечательности есть практически во всех районах. Памятниками, памятными местами и событиями выделяются Генический, Асканиевский, Садовский рекреационные центры Каховско-Бериславский и Херсонско-Белозерско-Голопристанський узлы. [4]

Херсонщина является единственной областью Украины, которая имеет выход сразу к двум морям, - Черному и Азовскому. С прибрежной зоной и прилегающими акваториями связаны надежды десятков тысяч жителей области на развитие туризма, экономическое возрождение региона, состояние которого, в настоящий момент, является чуть ли не наихудшим в аналогичных зонах (Николаевской и Запорожской). Существует ряд причин, которые привели к экологическому кризису на побережье. Последние десять лет прибрежная зона Черного и Азовского морей хаотично застраивается частными гостиницами и пансионатами. При этом происходит интенсивное загрязнение прибрежных вод и территорий биогенными и твердыми бытовыми отходами. Постоянные выбросы канализаций курортных зон, сток дренажных вод в акватории морей. По данным Херсонской областной государственной администрации состояние очистных сооружений и канализационных сетей не отвечают требованиям техногенно-экологической безопасности: г. Геническа (сброс в Азовское море), г. Скадовска (сброс в Черное море), с. Железный Порт (сброс из накопителя на территорию Черноморского биосферного заповедника), смт. Каланчак (сброс в г. Каланчак), г. Берислав (сброс к Каховскому водохранилищу). Оборудование и сети сверхнормативно изношены. Существует потенциальная угроза загрязнения водоемов зон рекреации государственного значения. Через несовершенство и изношенность систем водоотвода городов Херсона, Новая Каховка, Каховки, Берислава, смт. Горностаевки происходит загрязнение реки Днепр недостаточно очищенными и неочищенными (аварийные сбросы) сточными водами.

Главной причиной массовых заморов рыб, частичной стерилизации воды, снижения концентрации кислорода в воде, является эвтрофикация. Большое количество водохранилищ, на впадающих в Черное море реках, снижают объемы пресной воды, вливаемые в море, что в свою очередь приводит к повышению концентрации соли в воде. Вымирают определенные представители флоры и фауны. Украинскими учеными разработаны методические рекомендации для определения рекреационной нагрузки на природные комплексы территорий и объектов природно-заповедного фонда Украины. В зависимости от биологических свойств древесных, кустарниковых и травяных растений и естественных условий, в которых они растут, методическими рекомендациями определена пятибальная шкала степени стойкости естественных комплексов, объектов, их участков к рекреационным нагрузкам. В Херсонской области исследования проводились на территории базы зеленого туризма «Чайка» в Левобережно-Днепровском южно-степном округе

Левобережно-степного района Приднепровської низменности. Территории базы «Чайка» присвоена четвертая степень рекреационной нагрузки (наивысшая степень стойкости - первая). Стадия рекреационной дигрессии устанавливается в зависимости от степени нарушения естественной среды, которая, в свою очередь, прямо зависит от рекреационных нагрузок, стойкости к ним ландшафтных комплексов и проявляется в истапывании травяного покрова, повреждении деревьев и подобным повреждениям. Методическими рекомендациями выделено 5 стадии рекреационной дигрессии коренных ландшафтов: ненарушенные, малонарушенные, условно нарушенные, сильно нарушенные, деградированные. В ландшафтных комплексах на первой стадии коэффициент рекреации ( $k$ ), то есть отношение площади троп к общей территории, представляет до 5%, на второй – 6 – 10%, на пятой – 60 – 100%. Исследованная территория принадлежит ко второй стадии и имеет соответственно коэффициент рекреации 6 – 10%. [5] Ухудшение санитарно-гигиенического и экологического состояния прибрежных вод Чёрного и Азовского морей вызывает сомнения возможность устойчивого экономического и рекреационного развития херсонских прибрежных территорий.

Привлечь нового клиента (туриста) намного сложнее, чем качественно обслужить существующего и мотивировать его на повторный приезд. По результатам маркетингового исследования при поддержке Европейской Комиссии - *Preferences of Europeans towards tourism* к мотивации повторного посещения того же места отдыха европейские потребители назвали природные особенности региона (48 %). На втором месте - качество размещения. Конкурировать за европейского туриста необходимо не ценами, а природными особенностями и качеством обслуживания. При этом уровень цен при выборе места для отдыха находится на 4 месте. Только для 23 %, при планировании отдыха финансовые причины являются основными в отказе от путешествия. [6]

Бережное отношение к природе и окружающей среде является одним из привлекательных элементов туризма и путешествий. Туристические центры, которые расположены среди нетронутой природы и где уделяется должное внимание вопросам экологии, сохранению природного ландшафта и культурного наследия, становятся все более популярными и привлекают новых, экологически сознательных и подготовленных туристов. В Монреальской декларации по туризму (1996 г.) отмечено, что «Защита окружающей среды должна устоять перед давлением со стороны организаций или лиц, озабоченных только коммерческим успехом или личным обогащением». В основе последовательного и приемлемого на международном уровне управления экологическими вопросами лежит система экологического менеджмента, которая базируется на философии системного ряда качества (оперативные, регистрационные и контрольные процедуры) ИСО 9000 Международной организации стандартизации. Система экологического менеджмента может быть официально сертифицирована в Европе в соответствии с требованиями стандарта BS 7750 Британской организации стандартизации, подготовившей его в 1992 г. В Европейском союзе ведется активная работа

по внедрению разработанного положения 1893/93 «О добровольном участии компаний в Системе экологического менеджмента и ревизии». Представленные методики экологического менеджмента позволяют и рекомендуют предприятиям туристического и гостинично-ресторанного бизнеса проводить самостоятельно или заказывать объективные экоревизии, целью которых является улучшение экологических параметров деятельности.

Система экологического менеджмента предполагает при проведении экоревизии на предприятиях учитывать ряд аспектов, способствующих бережному использованию всех видов ресурсов (экономия сырья, электрической и тепловой энергии, воды); управления отходами (сортировка, повторная переработка, утилизация отходов повышенного уровня опасности). Воздействия на окружающую среду оцениваются по следующим направлениям:

1. Воздух: запах (производство и потребление электро- и тепло- энергии, приготовление пищи, транспорт, используемый туристами и персоналом).
2. Вода: водоснабжение, потребление воды (на кухне, при уборке, в сауне, в номерах, при оказании туристских услуг).
3. Почва и почвенные воды: охрана почвенных вод (при оказании туристских услуг, утилизации отходов).
4. Шум: состав и уровень шума (в месте отдыха, при оказании туристских услуг).
5. Визуальные воздействия: территория; окружающая местность; ландшафт; здания; маркетинг; отходы; туристские услуги.

Экоревизии дают ответ на то, каким образом туристские предприятия на практике решают экологические вопросы, насколько заинтересовано в их решении руководство, какова экологическая подготовка сотрудников, как распространяется экологическая информация и каким образом туристские предприятия учитывают интересы своих клиентов-туристов. Исследования показали, что благодаря применению новых экологических методов работы (например, солнечный подогрев воды) и небольшим инвестициям в гостиницах и ресторанах можно сократить потребление электроэнергии на 10-25%, а потребление воды на 30%.

В соответствии с методикой экологического менеджмента предприятия при предоставлении туристских услуг должны включать вопросы экологии во все сферы своей деятельности - от планирования и закупок продовольствия и инвентаря до решения повседневных практических вопросов. Внедрение экологических методов в управление туристскими предприятиями, экологического менеджмента является для индустрии туризма сравнительно новым направлением. [7]

**Выводы.** Основой процесса экологизации предприятий туристического и гостинично-ресторанного бизнеса Херсонской области должна стать гармонизированная с международным законодательством нормативно-правовая база охраны окружающей среды, социальная ответственность и регулирование отношений в эколого-экономической сфере, бережливое использование всех видов ресурсов, добровольное участие в системе экологического менеджмента.

А также внедрение комплексного подхода к экологизации, который предусматривает введение системы обязательных мероприятий относительно снижения нагрузки на окружающую среду, мероприятий, направленных на восстановление экологического баланса региона, реализация стратегий на возобновление исходного состояния естественных экосистем, а также привлечение инвестиций для внедрения высокотехнологичных, безотходных, ресурсосберегающих видов экономической деятельности, строительство очистных сооружений, рекультивация земель, расширения охранных территорий, как это происходит во всех высокоразвитых странах.

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## THE STUDY ON EMPLOYEE CORPORATE IDENTITY BASED CSR

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**Annotation.** *Corporate identity has been studied for many years. This paper is to study corporate identity from employee view based CSR. As we know, CSR is the responsibility taken by company to the public, the employees, the environment and others (Li – Zéman 2016). Employee is the core resource for the development of company. To get the employee corporate identity is the first social responsibility taken by company to the employee. Through the study in this paper, it can be seen that there is a positive relation between CSR and employee corporate identity. That is to say, if company cares more about CSR on employees, they will work more like the owner of company with full energy and satisfaction. To provide relatively satisfactory salary, to provide the basic support for employee to work and to make a better career development for the employee are the key social responsibility taken to get employee corporate identity. However, social responsibility is mutual, if corporate takes more responsibilities to employee, employee should take more responsibilities to corporate too, that is to say, employee should express more identities to corporate.*

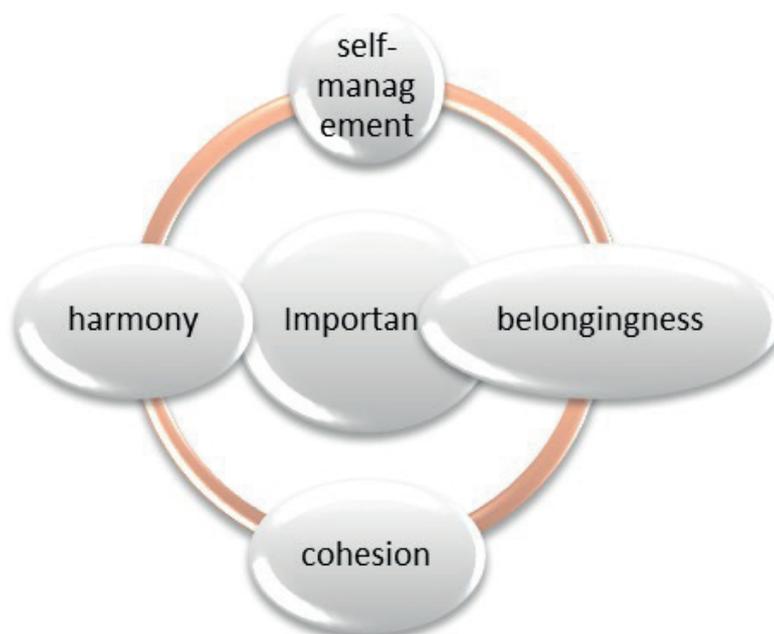
**Keywords:** *Corporate identity, CSR, Employee, Questionnaire investigation.*

**Introduction.** CSR is also very important for the sustainable development of corporate (Li – Zéman 2016b). Identity is the cornerstone of one of the most important areas of study in recent years. Corporate identity is the key issue for the corporate management from the beginning of the 21st century (van Riel – Balmer 1997), (Lentner – Szigeti – Borzán 2011).

As the great economic slump of 2008 brought an incredible hazard to public financing, also increasing national debt for all affected countries, some other form of revitalisation is required for the economy (Lentner - Szegedi - Tatay, 2015). One form could be recovering the trust in the bank sector, as Lentner et al. discussed, whereas an alternative would be strengthening the private sector's trust - the main source of is improving corporate identity. Due to the importance of corporate identity to the whole corporate, it attracts more and more attention from the academic and practical. And employee identity is the key point of corporate identity (van Riel – Balmer 1997). Once the employees form a very strong identity to the whole company, they will treat

themselves as the real member of the whole organization and work by themselves without monitoring. (Balmer – Greyser 2006)

The importance of employee identity can be summarized in the following figure 1.



**Figure 1. The importance of the employee identity**

*Source: Own construction*

There are total four main functions of employee identity summarized by the author in figure 1. A good employee identity can lead to a good self-management by employee. In this situation, the management cost of corporate will be reduced and the management level and efficiency will be increased rapidly.

A good-designed employee identity can increase the employees' feeling of belongings. Szigeti - Borzán - Lentner (2010) and Lentner – Szegedi – Tatay (2017/a & 2017//b) also hinted at the importance of employees' feelings for the firm, and how any business (in their case, agricultural) can either be advanced or harmed via an employee's commitment, or lack thereof. The increased feeling of belongings will make employee feel that they are working not for the salary but for their creativity.

And they are not working for employers, but working for themselves. Of course, cohesion will occur because of the good employee identity. All employees will work together and work more efficiently. And a better cohesion is the key point for the success of corporate.

At last, good employee identity will make all employees work harmoniously. This

harmony will make all employees work as one employee and the phenomenon “1+1>2” will occur which is contained in figure 2.



**Figure 2. The benefits of employee identity**

*Source: Own construction*

Employee identity is formed in the process of the judgment to corporate culture by their own characteristics, education, and experience etc.

Of course, corporate social responsibility (CSR) as the core of the corporate culture will influence the employee identity. There are a few studies on the relation between CSR and employee identity. This paper is to study the employee corporate identity based on CSR.

Attempting to define CSR happened multiple times, however, we'd only like to mention a few of these attempts in our study: «CSR is an approach which states that the enterprises integrate environmental and social perspectives into their business activities and their relations with stakeholders of their own accord» (European Committee, 2001).

Another definition states that responsible corporate activity means commitment to developing public welfare, which is realised through business practice, by applying the resources of the corporation (Csáfor, 2009).

Zsolnay et al. (2005) believe that CSR is «the commitment of economy to the sustainable development, which includes the following:

- decreasing corruption
- supporting and ratifying jovial labour conditions
- supporting society on a local, and on a wider scale
- increasing the truth content of marketing activities.

The Canadian Centre for Philanthropy believe that «They're management practices, which make sure that the company minimises the negative effects their activities have on society, while also maximising the positive effects (Kercher, 2007).

Carroll (1991) was the first who used the pyramid model for illustrating CSR, which was then followed by multiple other pyramid models, as a sort of continuation.

The CSR levels are illustrated on Figure 3.below.



Source: Rác – Putzer, 2015

Responsible corporate practice is instrumental in assuring profitability in the long term (Szlávik, 2005).

Archie B. Carroll (1979) determines four basic areas of corporate social responsibility

- economic responsibility
- legal responsibility
- ethical responsibility
- philanthropist responsibility,

Goodpaster and Matthews (1982) differentiate between three meanings of responsibility:

- responsibility of causing
- responsibility of following rules
- responsibility of making decisions

The pros and cons, and effects on the future of CSR can be seen on Figure 4.

**The concept of corporate identity.** Corporate identity is the set of multi-sensory elements that marketers employ to communicate a visual statement about the brand to consumers (Business dictionary.com, n.d.). (George 2011) Corporate identity contains the identities from the suppliers, buyers, employees and so on. (Chell 2007) Employee corporate identity is the identity from the employee to the enterprise culture, organization behaviours, and management styles and so on. (Chell 2007) The detailed elements of corporate identity are contained in figure 6.

From figure 6, all the elements of corporate identity are shown clearly. Corporate identity as a multi-sensor concept contains all the aspects of corporate activities and managements, from corporate culture, corporate communication, corporate behaviour, corporate design, corporate language and corporate philosophy. In fact, corporate identity is the whole image of the corporate activities and managements to customers, employees and others. (Gábor et.al 2016, Zéman 2016)

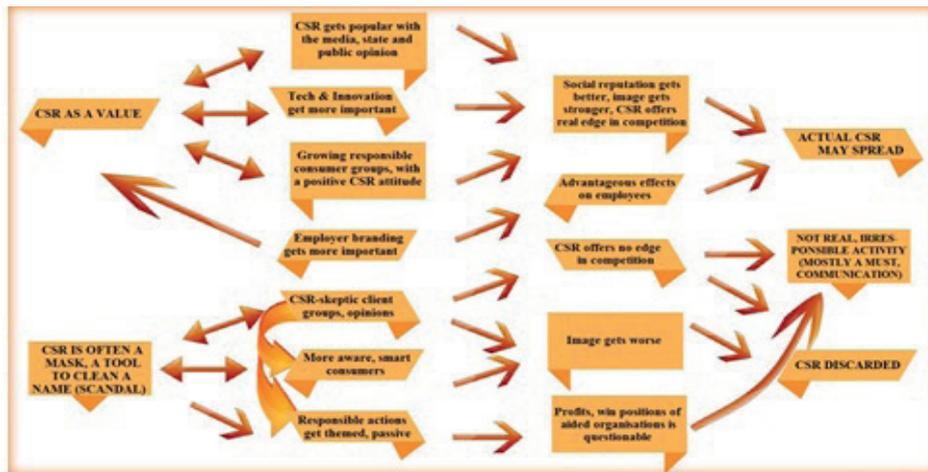


Figure 4. Pros and cons of CSR, and effects on the future  
 Source: Rácz – Putzer (2015)

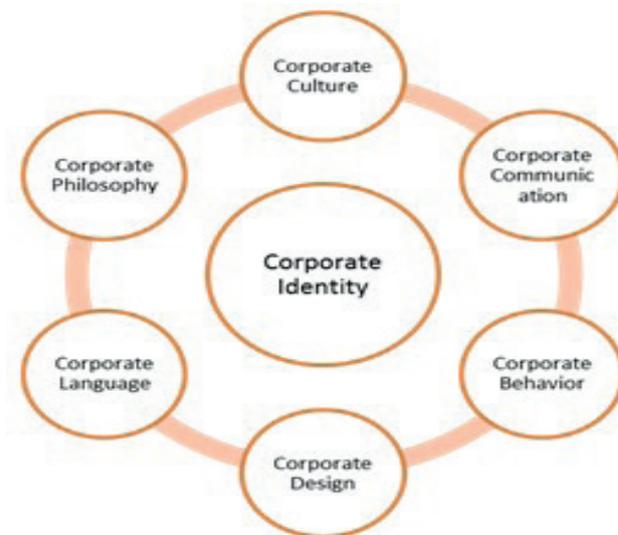
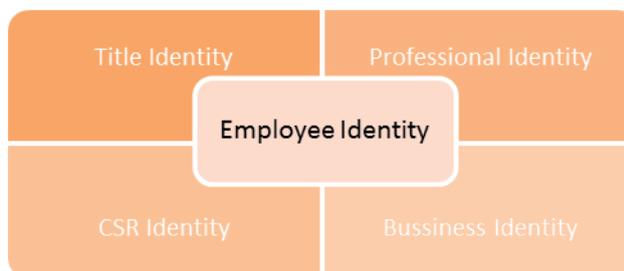


Figure 6. The elements of corporate identity



**Figure 7. The concept of employee identity**

*Source: Own construction*

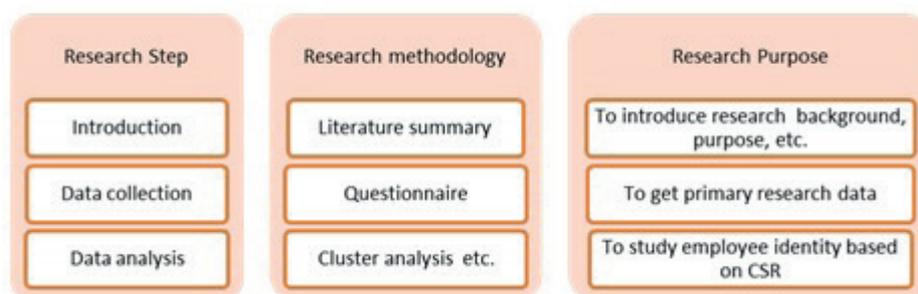
Employee identity is one of the elements of corporate identity, which includes title identity, professional identity, business identity and CSR identity.

Title identity is about the title employee gets from corporate. This stands the achievements of employee and the confirmation of employee’s achievements by corporate.

Professional identity and business identity are on the abilities of employee in corporate. Every employee wants to be helpful in the business process of corporate, so they want to get professional identity and business identity of corporate.

Identity with CSR is the key point of this paper, and it is also the new idea this paper wants to get focus on. Identity with CSR talks about the mutual responsibilities taken by corporate and employee to each other. If corporate wants employee to take more responsibilities to corporate to work as the owner of corporate, corporate should take more responsibilities to employee firstly.

**Research methodology and data collection.** In order to study employee corporate identity, this paper uses questionnaire to collect data and use SPSS 22.0 to do analysis. The total research structure is shown in figure 8.



**Figure 8. The total research structure of this paper**

*Source: Own construction*

Figure 8 tells us the whole structure of this paper. The first part of this study talks about the general information, such backgrounds, literature review, research methodology, etc.

The second part of this study contains selection of variables and data collection. The third part of this paper is concerned on data analysis, including descriptive analysis of the data this paper collects by questionnaire, summarizing analysis of the questions in questionnaire, and cluster analysis.

The questionnaire used in this paper contains two parts. The first part talks about the personal information and the general characteristics. The second part of the questionnaire is the potential variables that this paper wants to get research on. Because the questionnaire contains 34 questions, each of the question is designed by Likert’s five scaling model.

In order to get more and more general data, this paper puts the questionnaire on the website (<http://www.sojump.com/report/6777919.aspx?qc=>)<sup>1</sup>. This paper collects total 191 copies online. The descriptive analysis of the questionnaire collected is shown in the table 1.

Table 1

The descriptive analysis of the questionnaire

Factors	Number	Percentage %	
Gender	Male	90	47.12%
	Female	101	52.88%
Age	Below 24	110	57.59%
	25-34	76	39.79%
	35-44	4	2.09%
	Above 45	1	0.52%
Education	junior college	70	36.65%
	Bachelor	105	54.97%
	Master and PHD	16	8.38%
Years working in this company	(0, 1]	116	60.73%
	(1, 3]	54	28.27%
	(3, 6]	16	8.38%
	(6, 50]	5	2.62%

Source: Own construction

**Research hypothesis.** A corporate that will take more responsibility will make more attractive to the employee. Employee corporate identity has a positive relation with the corporate social responsibility. That is to say, when the corporate take more responsibility, it will be easier to be identified by its employee. Otherwise, the company with less or no social responsibility cannot be identified by its employee.

<sup>1</sup>Because the questionnaire online is renewed every day, the data used in this paper is up to 9, September, 2016.

The employee management based on the corporate social responsibility will be more identified by its employee and will affect the expectation of the employee. As what we talked above, we can know that the corporate identity of employee is based on the corporate social responsibility. So we can get the hypothesis that:

H0: There is a positive relation between employee corporate identity and the CSR.

This hypothesis means that the mutual responsibility is the key factor between employee and corporate identity.

**Reliability test of the questionnaire.** To be honest, this paper collects data online, and gets 191 samples. To order to test the reliability of the questionnaire, we use two methods to test the questionnaire, Cronbach's alpha and KMO test.

Cronbach's alpha is very generally used in the estimation of the reliability of a psychometric test in statistics. This paper uses SPSS 22.0 to take reliability analysis and choose Cronbach's alpha. The result is shown in the following table 2.

Table 2

Reliability Statistics	
Cronbach's Alpha	N of Items
.882	44

Source: Own construction

From the table 2, it can be seen that the Cronbach's Alpha is 0.882, which is greater than the every value 0.5. This is to say that the reliability and stability of the questionnaire is perfect and the data of the questionnaire can be used for analysis.

In order to test the validity of the questionnaire, this paper uses KMO value to test the validity. From the table 3, the result is shown directly.

Table 3

KMO and Bartlett's Test		
Kaiser-Meyer-Olkin Measure of Sampling Adequacy.		.783
Bartlett's Test of Sphericity	Approx. Chi-Square	1615.774
	df	193
	Sig.	.000

Source: Own construction

Table 3 shows clearly that the KMO of the questionnaire is 0.783 which means the reliability of the questionnaire is relatively high and can be accepted, the structure of the questionnaire is very well and the data is suitable for factor analysis. In other word, the quantity of copies is 191, which is more four times as the quantity of questions in the questionnaire (44). This indicates that the questionnaire is also suitable for the following analysis.

**Results and discussion.** The relation between salary and corporate identity

Through analysis of the questionnaire, the relation between salary and corporate identity is positive which can be seen in the table 4.

Table 4

**The statistic of salary-related questions**

Question	Strongly agree	Agree	Undecided	Disagree	Strongly disagree
Salary competitiveness	15.18%	14.66%	44.5%	12.57%	13.09%
Salary fairness	12.04%	21.47%	40.84%	15.18%	10.47%
Ability-oriented salary	15.18%	21.99%	38.22%	14.14%	10.47%
The favourable of salary	12.57%	17.8%	39.79%	17.8%	12.04%

Source: Own construction

From the table 4, we can see that most people in China are not satisfied with their salary. And only a few employees in China are satisfied with the salary conditions including salary competitiveness, salary fairness, ability-oriented salary and the favourable of salary. That is to say, to make employee relatively satisfied with salary is the part of social responsibility taken by company to the employee. And the salary conditions are the part of factors affect the corporate identity.

**-The relation between basic support from company and corporate identity**

In order to further understand the relation between the corporate identities based on CSR, this paper continues to study on the basic support from company on the employees. The related survey result is in the table 5.

Table 5

**The statistic of basic support from company on employees**

Question	Strongly agree	Agree	Undecided	Disagree	Strongly disagree
To sign legal labour contract	53.4%	21.47%	14.66%	3.14%	7.33%
To provide safe working environment	43.98%	26.18%	19.9%	6.28%	3.66%
To provide normal holiday	38.74%	24.08%	25.65%	5.24%	6.28%
To respect employee	50.26%	26.7%	18.32%	2.09%	2.62%

Source: Own construction

The table 5 is showing that the basic support from company for work is very important. If the company wants to take social responsibility to the employee, it should at least provide the basic support for the employees to work. And the labour contract is the key point of social responsibility of the company to identify the employees as the member of the company. The safe working environment is very important for the employees to work and to sustainably work in the long term for the company, which is also the social responsibility taken by the company to the employees. Rest is the recovery of energy for employees, so the holiday especially the illegal holiday is the company social responsibility to the employees too. Nowadays, with the development of the economy and education, employees are paying more and more attention on the holidays when they can get together to their family and enjoy the rest and love with their family. So if the company wants to get employee corporate identity, it should take more social responsibility to the employee. Here, it means that company should provide more basic support for the employees to work comfortably and reassuringly.

**The relation between employee development and corporate identity.** To help its employees to develop is also the social responsibility taken by the company to its employees. In order to get the real situation of this, this paper makes some questions to investigate and the related result is calculated in the table 6.

Table 6

**The statistic of the employee development from the company**

Question	Strongly agree	Agree	Undecided	Disagree	Strongly disagree
To provide further learning opportunity	29.32%	24.08%	33.51%	7.33%	5.76%
To provide promotion channel	21.99%	27.23%	33.51%	10.47%	6.81%

From the table 6, it can be seen that employees really care the development of their career. From the beginning of the 21st century, the learning society is coming, and all the people in the world know that if they stop to learn and to make progress, they will be abandoned by the society, so employees begin to care more and more about their career further. To provide further learning opportunity is to give chance to let employees to learn new technique, to get higher degree, to make new friends and even to get new ideas which to help employees to work better. To provide promotion channel is the key point of the career development for the employees. Promotion is the recognized by the company for the employees' ability and talent. This is the social responsibility taken by company to keep the excellent employees and to motivate the others.

**The relation between the love from employee and corporate identity.** In order to get the love of employee to company, we make some questions on it. The statistic results are shown in table 7.

Table 7

**The statistic of the love from employee to company**

Question	Strongly agree	Agree	Undecided	Disagree	Strongly disagree
I will not company under the depression	14.14%	18.85%	38.22%	13.61%	15.18%
I work hard for company out of my love	16.75%	26.70%	38.22%	8.90%	9.42%
I can do everything for company development	21.47%	25.65%	37.17%	8.38%	7.33%
I will work for company with full energy	18.85%	24.61%	37.70%	8.90%	9.95%
I can work for company in spare time	15.71%	27.23%	35.60%	9.95%	11.52%

*Source: Own construction*

From table 7, it can be seen very easily that most employees can not decided whether they are working for their companies out of the love to companies. Totally only 1/3 of employees agree that they are working for their companies because of the love to companies. Totally only 1/3 of employees agree that they are working for their companies because of the love to companies and they want to spend more time and energy for the work in companies, and they will consider about the development and future of companies where they are working. For the rest employees, they don't agree with this, maybe they are working for their companies only because of the salary, or because they cannot find a better job. For human resource managers, they should have the ability to find who is working for companies with love and who is working only for salary. And even they should have some solution to help employees to work for companies with love and energy.

**The relation between the obligation from employee and corporate identity.**

Table 8 shows us clearly that most employees feel the obligation to company because of the employment. More than 60% employees consider that they should be loyal to their companies due to employments. And more than half of employees think that it is their obligation to work for companies, and they would like to treat their companies like their families. However, nowadays to change job is the basic human right, so most employees jump to the conclusion that it is not moral to change job.

**The cluster analysis of questionnaire.** For studying the influential factors of employee identity based on CSR, this paper uses SPSS 22.0 to do cluster analysis. In order to study the influential factors of employee identity based on CSR better, this paper removes the first 8 basic questions from the total 44 questions which talk about the fundamental information of the people being investigated.

This paper uses K-means cluster analysis of SPSS 22.0 to analysis the remaining 36 questions. The cluster membership is shown in table 8.

Table 8

**The statistic of the obligation from employee to company**

Question	Strongly agree	Agree	Undecided	Disagree	Strongly disagree
It is my obligation to work for company	23.04%	30.89%	32.98%	6.81%	6.28%
I think it's not moral to change job	10.47%	7.33%	34.55%	20.42%	27.23%
I should be loyal to company	40.31%	24.08%	28.27%	4.71%	2.62%
I should be dedicated to the company	32.46%	31.94%	28.27%	4.19%	3.14%
I will love company as much as I love family.	25.65%	27.23%	33.51%	8.38%	5.24%

Source: Own construction

Table 8

**Cluster membership**

Case Number	Cluster	Distance	Case Number	Cluster	Distance
9	1	12.352	5	3	12.901
10	1	15.463	6	3	12.266
11	1	5.902	8	3	6.616
13	1	12.808	2	4	9.608
14	1	3.937	3	4	10.222
15	1	10.791	4	4	6.915
16	1	16.212	12	4	4.241
17	1	10.92	24	4	16.608
21	1	8.48	28	4	13.108
22	1	20.492	30	4	18.524
23	1	8.102	31	4	15.226
25	1	22.655	32	4	13.607
26	1	12.4	33	4	19.553
27	1	15.698	34	4	18.569
29	1	14.63	1	4	14.514
7	2	8.055	18	5	13.654
19	2	8.42	35	5	10.791
20	2	13.695	36	5	3.712

Source: Own construction

After the K-means cluster analysis, this paper gets total 5 clusters of the 36 questions in the questionnaire. From the first cluster, cluster 1 talks about CSR on employee. That is to say, if corporate wants to get more employee identity, it should take more social responsibilities to employee. For instance, corporate should provide clearer career plan for employee. Corporate should provide more fair chances for employee to take part in learning and training. Corporate should provide relatively competitive salaries for employee. As we know, responsibility is mutual. So in the cluster 1, we also see that employee think they should take responsibility to corporate too. For example, employee should work hard for corporate with full energy. Employee has the obligation to work for corporate. Employees should love corporate as they love their family. This also means that if corporate takes more social responsibilities to employee, employee will also feel more responsibilities to corporate.

Cluster 2, cluster 3, cluster 4 and cluster 5 are also talking about the relation between corporate social responsibilities to employee and employee identity. From cluster 2, 3, 4 and 5, we can see that social responsibility is the key influential factor of employee identity. The mutual responsibility to employee and corporate helps each other to cooperate better and helps to improve corporate performance.

**Conclusions and discussion.** From the data and analysis above, we can get the conclusion that there is a strong relation between CSR and employee corporate identity. Salary related social responsibility is to meet the material needs of the employees, and to provide satisfactory salary is the basic social responsibility to the employees. Employees also need the basic support from the company to work safely and contentedly, so to provide basic support is the CSR to get the employee corporate identity. At last, every employee wants to build their own career, so to provide career development support is also very important. Further learning opportunity and promotion channel are the two key points for the career development.

This paper firstly focuses on employee identity from the view of CSR. The mutual responsibility can make employee and corporate more related to each other. If corporate wants employee to work harder with more responsibilities, corporate should consider more for employee's needs.

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## CONSTITUTIONAL COURTS AND THE ECONOMY

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**Annotation.** *In public discourse and public thinking, constitutional law usually appears as an «accessory mean» to politics. This is, however, a quite distorting simplification. In international comparison two basic constitutional models are known. It is clear from the above discussed that the most practical solution for a centralized model is where the Constitutional Court has the right to constitutionally overrule the decisions of ordinary courts. We can also emphasize that the more dominant the concentration of power is, the more significant the dominance of certain economic interest groups can be.*

**Keywords:** *public finance, centralized model, economics, Constitutional Court, ordinary courts.*

**The connection between constitutional law and the economy.** General belief holds constitutional law only an ancillary tool (or a neighbor) of politics, but the purpose of this study is to clarify the context of constitutional law and economy. Of course, there is a close relationship between economy and politics<sup>2</sup>, but in this study our focus will fall on those financial and economic issues that are less related to party politics.

In 2012 Hungary's new Fundamental Law introduced the institution of the genuine constitutional complaint enabling any economy related court decisions (even having no political relevance) to be challenged in front of the Constitutional Court.

In public discourse and public thinking constitutional law usually appears as an «accessory mean» to politics. This is, however, a quite distorting simplification. As you will see, numerous economic issues may have relevance to constitutional law e.g. proprietary right is a fundamental constitutional right in every law-abiding country. Connections between probable causes of property rights and business ventures may be relevant even at the first glance. However, the logic and approach of constitutional law and civil or economic law are significantly different.

We have already pointed out that the notion of property in constitutional and civil law is not identical, in some respects it is narrower or in other ways it is broader. Not all aspects of ownership are fundamental rights. On the other hand, the right for constitutional protection of the property does not exclusively belong to the civil

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2 Lenter, Csaba: Scientific Taxonomy of Hungarian Public Finances After 2010, In. *Civik Review - Polgari Szemle: GAZDASÁGI ÉS TÁRSADALMI FOLYÓIRAT* 13:(Speciel) pp. 21-38. (2017) & LENTNER, Csaba: Unorthodox Fiscal and Monetary Policy in Hungary in the Light of International Trends *XINGZHENG KEXUE LUNTAN / RESEARCH OF ADMINISTRATION SCIENCE*, China, 1:(6) pp. 51-58. (2014)

proprietor.<sup>3</sup>

It should be noted that the Hungarian Constitutional Court regarding Article 13 of Fundamental Law - in accordance with its previous interpretation of the Constitution before the acceptance of the Fundamental Law- maintained its practice<sup>4</sup> that property right is fundamental but in addition to the property already acquired in exceptional cases also protects property reversions<sup>5</sup>.

After the Fundamental Law came into force the Constitutional Court recognized the financial leasing agent as such an expectant, considering, in particular, that he is entitled to bear all segments of ownership rights, except the right of disposal but holding the right of mannerly usage so not to cause any harm<sup>6</sup>.

However, the same Constitutional Court did not consider the difference between the price of the market rate in final repayments and the amount of repayment on fixed rate as reversion. The Constitutional Court's decision (3048/2013. (II.28.)) argued that the occurrence of changes in foreign exchange rates necessary to involve public intervention was an unforeseeable circumstance that could not reasonably be expected and in this respect it did not produce any remainder for the amount of difference between the market rate and the fixed-rate repayment and as such it could not have been legally assessed and consequently it did not fall within the scope of constitutional property protection.

The Constitutional Court also does not regard the hope for future profits of business activities and the resulting expected profit<sup>7</sup> derived from the ownership right recognized and protected by constitutional right. In its AB Decision 3194/2014 (VII.15.) examining the trade of tobacco products in Hungary regarding the exclusive distribution right of the state, decided that any retail activity of tobacco products as a licensed economic activity carried out before the Traffic Act<sup>8</sup> came into force did not fall within the scope of the Fundamental Law XIII. Article 1.

Bobek refers to the personal statement of a member of the Czech Constitutional Court which says that seemingly anything can be a question of constitutionality provided that the text of the Constitution referred to contains at least these three fundamental

3 TÉGLÁSI András: The Influence of Fundamental Rights on Civil Disputes in the Legal Practice of the Constitutional Court of Hungary Within the Three Years Following the Coming Into Effect of the Fundamental Law of Hungary - With Especial Regard to the Constitutional Protection of Property Rights. *Jogtudományi Közlöny* 2015/3., pp. 152-155. (Hungarian)

4 See previous decisions of the Hungarian Constitutional Court: Decision 64/1993. (XII. 22.), Decision ABH 1993, 373.; 10/2001. (IV. 12.), Decision ABH 2001, 123., Decision 819/B/2006., ABH 2007, 2038, 2041.; In regard of strengthening the previous practice, please see: Decision 3115/2013. (VI. 4.) AB, Reasoning [34]

5 AB Decision 3194/2014. (VII. 15.) AB

6 AB Decision 15/2014. (V. 13.), Reasoning [26]

7 AB Decision 3194/2014. (VII. 15.), Reasoning [24]; and similarly, to this: AB Court Order AB 3137/2014. (IV. 24.), Reasoning [15]

8 Please see Act 2012/134 On the Reduction of Smoking of Juveniles and the Sale of Tobacco Products, § 2 (2012. évi CXXXIV. A fiatalok dohányzásának visszaszorításáról és a dohánytermékek kiskereskedelméről szóló törvény 2. §)

rights: human dignity, the right to a fair trial and the prohibition of discrimination<sup>9</sup>.

**The status of the Constitutional Court.** In Hungary Prior to the regime change there was a general and significant uncertainty. The emerging political powers were just about finding their own position, the elite of the Single-party state was afraid of the consequences of new regime. Thanks to that fact and the spectacular declaration of the rule of law these promoted the coming into being of a Constitutional Court which possessed one of the broadest authorities in the world. Is that the way it is indeed? The question can be raised up, since the constitutional challenge was not implemented by the relevant statutory instrument from its' benchmark, the German system. The new Foundation Act enacted in 2012 filled in that gap.

After all let us have a look what does that difference mean, and what kind of constitutional courts exist in the world. In the light of these we shall be able to locate the meaning of the Hungarian reform.

In international comparison two basic constitutional models are known. In one of the models the traditional courts - headed by the Supreme Court of the State – compare the individual legal norms with the standards of the constitution, and ultimately overrule the statute in concern. So, in this scheme practically all courts implement constitutional judicature, but due to appeals, and legal remedies the Supreme Court of the country is the authentic and principal body of the interpretation of the Constitution. Therefore constitutional judicature is called decentralised in countries of the above range.

The other model is where, an individual body is set up to review legal acts, statutes in the light of the constitution. ( Only in the latter, it is possible literally, and in the classical sense, to speak about constitutional court.) Obviously, beside this, there could be other scope of authority, of bodies above mentioned<sup>10</sup>.

There is no separate constitutional court classically in the *UK, US, Australia, Canada, Denmark, Norway, Sweden, Japan*. Article 120 of the Dutch Constitution is a peculiarity: the courts - so that there is no separate constitutional court - do not rule on the constitutionality of a law!

As far as *Switzerland* is concerned, we might say, a particular mix of the classical European and American models incorporates. Each court has the right - except the federal level - to examine the constitutionality of the laws. The Federal Court has the power to participate in individual constitutional complaints; however, it is authorised to overrule legal regulations on cantonal level.

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9 Bobek: i. m. 18–19. 57. lj.

10 We focused on the protection of the four freedoms noting that the characteristics of individual constitutional courts, focal points can be judged only on the grounds of all their jurisdiction. We may add, that not only the constitutional complaint and the normative control are related with fundamental rights, but the same could pertain to international treaties, as well as for consideration of the referendums and election issues. If we refer to the name of the specific bodies, apparently as specific property names they should be entered uppercase; however as abstract doctrinal concepts, we specify these bodies as constitutional courts.

The *Greek* form of constitutional judiciary is also a curiosity; among members of the Supreme Court of the State and law professors, judges are appointed by drawing of lots. The judiciary only has the jurisdiction to control the acts, there is no authority for lower-level legislation, such as statutes. Also, it should be pointed out that other courts in their scope of discretion consider the constitutionality of the statutes.

In Hungary the mandate period of a member of the Constitutional Court is a twelve years term. Member of the Court cannot be re-elected. This represents a significant change compared to the previous law, under which, beside a nine-year term mandate, there was a one-time opportunity to re-election<sup>11</sup>. However, this created a chance, at least in theory, that the members of the constitutional court at least towards the end of their mandate), with their «behaviour», and their votes are trying to promote their re-election. In several states the mandate ends at the time of retirement. (eg.: Austria, Bosnia and Herzegovina, Turkey, etc.). In Azerbaijan the first mandate period is a term of fifteen years! A one-time re-election is possible, but the second cycle can last only for 10 years<sup>12</sup>.

Such people are excluded from the membership of the Constitutional Court whom were members of the government, or were senior party officials within four years prior to the date of the election, or held state leadership positions.

At least nine, and no more than fifteen Members of Parliament that form a nomination committee make a proposal for Members of the Constitutional Court. The committee must provide a seat for each representative of the parliamentary parties.

Another concern is the election of the judges. International practice usually splits the right of election. In many countries the head of state also has the option to delegate members. Bicameral parliaments also provide complex opportunities from this point of view.

In France, for example, the President of the Republic, the president of the National Assembly, and the President of the Senate shall appoint 3-3 members out of the possible 9.

A third of the 15 members of the Italian Constitutional Court are delegated by the parliament, another third by the head of state, three colleges authorized through certain collegiums of the Supreme Court, one by the Council of State and the State Audit Office. This model is inherently provides that persons with a professional judicial experience could become a member of the body.

In Austria the president, the vice-president, the 12 ordinary members and half of the six alternates appointed by the President of the government designation. The Federal Council and the National Council recommends regular 9-9 and 3 or 6 alternates. One-third of whom also appointed by the President of the Republic.

In Slovakia it is also the President of the Republic who appoints the 10 constitutional

11 In some states term of office lasts until retirement. (eg.: Austria, Bosnia and Herzegovina, Turkey etc.) In Azerbaijan for the first period it is a 15-year mandate! A one-time re-election is possible, but the second period lasts only 10 years. Vid. LEGÉNY op. cit. p. 235

12 See. Legény op. cit. 235 p.

judges recommended by the National Council of 20 persons. The particularity of these two latter models is the plural designation system, that is, a few finally gain the membership, but there will be some disappointed, who are being considered, - would take the mandate, but do will not be initiated to office. On the one hand it partly reduces the prestige of candidacy, and the other hand results in the fact that the most appropriate persons probably will not undertake candidacy.

In Spain, the judges are appointed by the King. Four of them by the lower, another four, by the upper house are appointed based on a two-thirds majority, another four (2-2) are appointed by designation of government and the Judicial Supreme Council.

Three members out of whole thirteen of the Portuguese Constitutional Court are already co-opted by the already elected ten individual. In my view this particular solution is welcomed, because, from inside candidates' expertise can be judged more objectively, on the other hand is more perceivable, what kind of expertise and skills are needed to get a better distribution of cases.

Very specific the Belgian model. Judges are appointed by the King with two-thirds majority of the Senate, from two different circles of candidates. Members of one of the groups have at least a five years of previous mandates in the high positions at the Court of Cassation, at the Council of State, at the Constitutional Court, or at least university teachers for at least five years. The second group, however, are formed by persons who were members of the Senate or the House of Representatives at least for 8 years, so here politics specifically channelled in, in stark contrast with the model that kept away majority of robed bodies from the world of politics<sup>13</sup>! This solution, specifically makes the Constitutional Court a part of the system of checks and balances.

The Turkish model is highly specific. It is complete authority of the head of state to appoint the 11 regular members and four deputy members. It is the specificity of the model, that public institutions / organizations appoint judges. (These are higher courts, the State Council, the Higher Education Board, administrative professionals' organizations and bar associations.)<sup>14</sup>

We could consider as a discrepancy from the classic «binary code» the solution -that is applied in Bosnia and Herzegovina- and what prevents from the inevitable comparison with the duality of government / and opposition. President of the European Court of Human Rights appoints 3 from the 9 members of the Constitutional Court. Further exception that these members can not be citizens of neither the given state nor the those of neighbouring countries<sup>15</sup>.

Costa Rica's constitutional structure is outstandingly interesting. The normative task is implemented by the Sala Courta, an individual plenum of the Constitutional Court.

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13 Specific requirement that Dutch and French language groups give the same number of judges in each group.

14 Vid. LEGÉNY: *Different Models of Constitutional Justice* (Összehasonlító alkotmányjog, ed. Judit Tóth-Krisztián Legény, Complex, Budapest, 2006) p. 232. (Hungarian)

15 LEGÉNY op. cit. p. 235 Analogous rule, that in Liechtenstein from the six members only the president, the deputy and two other members must be citizens, while the others may be foreigners.

(The two bodies – with a relative autonomy - interlocks.) The members are elected by a two-thirds majority in parliament for an eight-year term. Inasmuch the legislature with a two-thirds decision had not replaced the judges so mandates automatically extends. In my opinion, this model provides simultaneous manifestations of independence and control<sup>16</sup>.

In Hungary, judges of the Constitutional Court are elected by the Parliament by a two-thirds majority. The entire origination of the post from parliament is a substantial nexus between the policy and the body. If one political side has a two-thirds support, then even the most prominent jurists could be stigmatised as «party soldiers». If, however, the proportion of two-thirds is divided among several political power, the situation is also subject of concern. In general, for the interest of consensus in the commission both sides mutually agree to one other's candidate, so it can be traced back, who recommended the individuals. That is why it would be appropriate to introduce multi-channel nomination of the members.

The new Constitution and the ACC. created the legal ground of identical nomination method that is identical with nomination of members. The parliament elects the chairperson among the members already in position. Previously, rules of procedure specified number of member designation, in several rounds and in an absolute-absolute majority system. Chairperson was elected by the members from among themselves (The deputy chairman as well.)

The presidential term of office covers the president member's mandate time. That is to say, it could be almost 12 years or even 12 years. ( Not evident that in the selection process it is tactical aspect to take into consideration the years of term of office. The current rules, notwithstanding foster this. )

Both models have arguments for and against. Members probably know better who is the best, most prestigious professional, under whose leadership, they could work best. However, election by members could determine and foster negative factors such as overly patriarchal internal relationships, personal conflict or cooperation, personal concentrations may dominate in this model. Mandate attributable to parliament ensures greater legitimacy, for the decision indirectly traced back to the people's will.

In Lithuania the judicial power of constitutional court is very much like that of the Hungarian constitutional court. Parliament elects the president, but with the designation of the head of state. In Germany and Switzerland it is also the representative body of the people that elects the president, but coming from inside, after a proposal by the members. (In Germany by voting in both houses separately, In Switzerland by a joint meeting.)<sup>17</sup> The presidential cycle lasts 2 years in Portugal, 3 in in Bulgaria, Spain, Slovenia, and four years in Croatia. The edge of scale is France, where mandate time is nine years.<sup>18</sup>

16 Furthermore in respect of specific constitutional complaints judges have a great freedom of movement. Vid. Béla POKOL: A bírói hatalom, Századvég, 2003. Budapest, p. 39 p. 40,

17 LEGÉNY op. cit. p. 234 In Argentina, Croatia, Bulgaria, Italy, Portugal, Slovenia and Turkey, the members elect a chairman from among themselves. Vid. op. cit. p. 233

18 Ibid.

The German Constitutional Court was not by chance the role model when creating the Hungarian institution<sup>19</sup>. Its spheres of authority - in international comparison - are quite wide. Land of origin of the real constitutional complaint- recently introduced in our country - is Germany, furthermore, beside scopes of powers known in Hungary, we have to emphasize the institution of electional judging. (It should also be mentioned, that constitutional courts operate at member state level as well!) The body went into operation in 1951. Until 1999, it is estimated to have decided in more than 100000 cases. 96% of them were individual constitutional complaints!<sup>20</sup>

An outstandingly important authority of the German committee that until the annulled act replaced (by a body with jurisdiction) this plenum has the right to release provisions regulating temporarily unsettled life situations.<sup>21</sup> This is actually a positive legislation, instead of the traditionally negative legislative competence of constitutional courts.

So the constitutional complaint is applicable against specific judicial decisions or statutes can be applied as well. Criteria in the former case are exhaustion of other remedies and one month of submission deadline. The latter may be enlisted within one year the legal norm becomes effective.<sup>22</sup> The Federal Constitutional Court with «constitutionally conforming interpretation» may determine the correct meaning of a legal norm on constitutional grounds<sup>23</sup>.

The decentralized constitutional courts deal with the tasks of the traditional jurisdictional litigation, investigation of international treaties, the dignitaries special impeachment, or the election of arbitration. But most important is to emphasize the institution of the scope of the review of the legal norms.. In my view, the conceptual basis for the decentralized constitutional courts, the possibility of ex post constitutional review.

The biggest problem of decentralized model that blends with the practice of the courts dogmatic consistency professional branches of law (civil law, criminal law, etc) and practice abstract view of constitutional law, because every court constitutional judiciary too. While providing greater protection against gaps. The centralized model has the advantage that separates the interpretation of the law and the specific interpretation of the Constitution. The fact has in its favour that the decisions are deployed to a specific body which is an expert of the subject in the field of constitutional law.

It is clear from the above discussed that the most practical solution for a centralized model I, where the Constitutional Court has the right to constitutionally overrule the decisions of ordinary courts. (Perhaps some may complement the constitutional complaint

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19 In contrast with the Austrian model – as generally regarded - the first centralised Constitutional Court, many see the origin of the institution in the Paulskirche court, set up according to the Constitution adopted in 1848. Vid. ÁDÁM op. cit. p. 185.

20 LEGÉNY op. cit. p. 225

21 ÁDÁM op. cit. p. 188.

22 ÁDÁM op. cit. p. 188

23 ÁDÁM op. cit. p. 185.

the Ombudsman's investigation basic rights insulting activities of individual acts.

After the collapse of the socialist system in Central Europe - despite the American intellectual influence - almost all centralized constitutional courts have been established. So this kind of body work in Poland, Hungary, the Czech Republic, Slovakia, Croatia, Slovenia, Serbia, Romania. Exemplary development of the Baltic states. This may be due to the replacement of radical socialism socialized traditional court personnel already heavily gone, so at least in the Constitutional Court had to build from scratch. Interestingly, Lithuania and Latvia have established decentralized Constitutional Court. (Moreover, Lithuania adopted the German model of classical constitutional claim.) In Estonia, there is no separate body for this purpose. Hungary in 2011, the new Constitution created the new Constitutional Court Act also contains detailed provisions. In 2012. Both entered into force.

Latvia operates under the Constitution, the Constitutional Court, which examines the impact within the scope prescribed by law in cases concerning the constitutionality of the law, as well as other matters that are referred to the competence of the law. The Constitutional Court is entitled to laws and other acts declared invalid<sup>24</sup>.

Judges of the Constitutional originates from many bodies, namely the parliament, government and high courts<sup>25</sup>. The seven judges were 2-2 and 3 were designated above. They were all confirmed by the absolute majority in the parliament. The mandate is for 10 years and can not be revoked<sup>26</sup>.

The Board has jurisdiction, inter alia, to examine the constitutionality of laws and international treaties prior and subsequent control of norms, pronouncing the lawlessness of decisions of lower-level administrative establishments and also considering constitutional complaints<sup>27</sup>. (Thus, the introduction of the German model Individual constitutional complaint and concrete norm control).

The Lithuanian Constitutional Court will decide whether they act in accordance with the laws adopted by Parliament and the Constitution, and that the President of the Republic and the Government acts violate the Constitution and the laws.

In relation to these issues the Government, or at least one-fifth of the deputies, and the courts may apply to the Constitutional Court.

Why does the expansion of the institution of a constitutional complaint is a significant development for Hungary?

This created a significant loophole, because it becomes somehow solicitous c (but not unconstitutional) act somewhat rigid, inflexible interpretation in many cases violated the fundamental rights of the party, so that neither of our Constitutional Court, not the traditional court system could not create legal grounds for a review. So, as he puts it earlier, some «vacuum» ruled the legal protection of a narrow field. This «narrow» grey

24 See Lett., Article 85 of the Constitution. The legal aid system is a strong connotation, the mere fact that the Constitution is very laconic density these terms.

25 CREW i.m. 232 p

26 Chronowski Nora: Republic of Latvia (In .: Chronowski Drinóczi-im), p 302.

27 Ibid.

zone noting but good reason for the citizens, who leaned into poverty because of a legal vacuum may be listed here ...

(Although we are somewhat skeptical about courts with the function of the - American-style constitution interpretation - against a system, we must add, even *ad absurdum* may also be a potentially better solution than the model with the «vacuum» where certain matters are regulated neither by ordinary courts nor by separate control panel conducting the legal norms.)

In summary, we can say that where individual rulers or institutions representing a small lobby group can nominate constitutional judges, there is a greater likelihood on influence of individual economic interest groups. It is easier to pressure the presiding officers of a senate or presidents of a republic than a body of a parliament composed of hundreds of people. The Turkish system can be very praiseworthy to mention where economic lobby groups can easily be visible behind the nominating institutions. Long term mandate can theoretically guarantee independence but a constitutional court judge unlinked from politics for a long term can easily be led by any economic group (other than the government).

We can also emphasize that the more dominant the concentration of power is, the more significant the dominance of certain economic interest groups can be.<sup>28</sup> (This stems in the obvious fact that more people are more difficult to pay off or financially control than just a few.)

Of course, the above mentioned are merely theoretical, probable speculations, we do not want to judge any constitutional court in bad faith.

**Difficult cases.** An act, which is not unconstitutional in itself could still result into offending the fundamental rights of someone very seriously even if the interpretation itself is not erroneous either. If an insufficiently reasoned legislation is interpreted by the courts in a far too inflexible way, than it is most likely the rights of the involved ones will might be violated. So it was an instructive case in Hungary at the time of the previous Constitution, even when there was no real possibility of the «real» constitutional complaint. For instance a testament was invalid because at the time when the previous Civil Code was in effect it was compulsory to number both sides of each pages. The computer word processing program automatically does not print the first page number. The heirs have attempted to broad interpretation to the meaning of the title page of the first number. The Supreme Court rejected this interpretation with its rigidly textualist interpretation. They only strictly complied with the words of the law. The law itself is not unconstitutional, as the significance of the Page numbering guarantees that the pages could not be replaced. Therefore, the Constitutional Court could not give a remedy the problem. So overall, the fundamental rights of the heirs were seriously violated. Real constitutional complaint under the new Constitution would allow the effective protection

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28 In a sense, sharing of power can be considered as proliferation of power, an antidote to the concentration of power. That is, the more people fill in a position, the more difficult it is to become a tyrant. Please see: CSERVÁK Csaba: A végrehajtó hatalom és a parlament választása, (The Executive Branch and the Election of the Parliament) *Lícium-Art*, 2016. Debrecen, p. 202.

of fundamental rights at similar cases.

In a number of similar legal cases of victims of the wrongly chosen exercise of rights ended up on the «no man's land»<sup>29</sup>. Neither the inflexible textualist courts, nor the Constitutional Court, which was tendentionally refusing individual cases was lacking the scope of authority to protect our fundamental rights. Due to such problems the new system considered to be a significant step forward from this aspect.

The real difficulty is in making decisions in those cases, where there are many ways of interpretation, and one of them is unconstitutional, or (also in case of the possibility of multiple interpretation) the application of all of them results into such an outcome, where there is only one which in compliance with the Constitution.

These latter cases can affect the division of the scope of authority effectively in between the Supreme Court and the Constitutional court. Insofar as the Constitutional Court establishes its own jurisdiction even in case of «regular» illegality on the top of unconstitutionality than it and essentially becomes a «Super Court» and actually rises above any specific case country's highest judicial forum. With such a function it would exceed its originally designated scope of power and it would cause a significant instability of the legal system, practically transforming the entire judiciary system to be a five-grade one.

This risk could be overcome through constitutional provisions relating to the complaint is accurate, casuistic regulation or a very wise and diplomatic practice of interpretation. The standard for being a very laconic in Hungary, there is a chance for a second solution.

That is a very strong separation of the «anti-Constitutionality» and illegality, through a thoroughly reasoned and fine-tuned strategic partnership of the Constitutional Court and the Supreme Court through strategic partnerships. This evolution is still the big issue of the future.

Civil law disputes, directly based on a fundamental right (such as the right to property and the cross-section of the right to freedom of expression and freedom of expression) have already been challenged in Germany in the 1950s. In the Dish Case<sup>30</sup> a Turkish tenant wanted to place a satellite dish in his rented apartment, so he needed the landlord's permission which was denied. In the case, the landlord's right to property was against the freedom of obtaining information and by the decision of the German Federal Constitutional Court –based on the civil court's judgment- the right to obtain information

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29 In a related case law at the end of the will not included the location next to the date: Budapest, but it was included in the text.. The court refused the basic legal reasoning and declared invalid, so the lady who carried her father alone is not that inherited the property 1/1 (only half), but because of the lawsuit years of pulling of the court additional user fees ordered another ½ as regards, so even she became indebted to the sister who ignored their parent for years!

30 BVerfG 9 February 1994, BVerfG 90, 27, NJW 1994, 1147, 1148.

was violated<sup>31</sup>. The decision is interesting because here a classic segment of the property right, the right of use was transferred over under a lease contract, which unilaterally benefited the tenant by reference to a basic law. In my opinion, in this case the challenge of fundamental rights is merely apparent, in fact the question of the right of use of the property became controversial, in which case the owner's privileges should not be questioned (unless he voluntarily declines it). The reference to the right to obtain information would only arise if it was not an owner-tenant legal relationship between the parties, but an owner-to-owner - that is, a person in the same legal position - would like to install a satellite dish in his own apartment and one of his neighbors wanted to prevent it.

In the leasing relationship, the German Constitutional Court in its 1958 so called Poster Case declared that the tenant has right to place posters, flags and banners on the rented apartment, so that the rented apartment can be used to express his / her opinion as long as it does not violate the peace of the apartment and the social peace of the dwelling community.<sup>32</sup>

Thus, it also raises the question of how private law relations can be transformed by allowing the review of a lease agreement (or in a broader context any private law contract) alluding to individual fundamental rights and the subsidiary legal civil regulations will be set aside. Based on this the landlord of the apartment must also consider in the future that the tenant at any time may have a wish in any kind of investment or transformation in the property, which, -if sufficiently backed up by well-founded fundamental right-, can be carried out even against the will of the owner. Fruzsina Gárdos-Orosz even raises the danger that the owner will not even be able to choose the future in order not to violate the requirement of equal treatment<sup>33</sup>. This is clearly against that fundamental principle of private law that an individual cannot impose obligations on another individual without his consent, nor may an individual be obliged to protect the interests or benefits of another individual unless such rights and obligations are clearly expressed by positive law.

The new Constitution has more detailed regulations regarding public funds<sup>34</sup> (compared to the previous Constitution) and brought significant changes in this regard by giving veto power to the Fiscal Council<sup>35</sup>.

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31 Gárdos-Orosz Fruzsina: Alkotmányos polgári jog? (Is Civil Law Constitutional?) Az alapvető jogok alkalmazása a magánjogi jogvitákban.(Implementing Fundamental Rights in Civil Disputes) Dialóg Campus, Budapest – Pécs, 2011. p. 59 and p. 61

32 BVergG Urteil vom 15.01.1958. (1 BvR 184/54) BVerfGE 7, 230.

33 Gárdos-Orosz: Alkotmányos polgári jog? (Is Civil Law Constitutional?) i. m. 109

34 Please see: ERCSEY Zsolt-ERCSEY Zsombor: Some aspects of the Hungarian regulation on ragweed, Acta Universitatis Brunensis, vol. 534. and LENTNER Csaba: Uncertainty Factors in National Economy Planning - International Effects and Hungary's Outlook Up to 2050, CENTRAL EUROPEAN POLITICAL SCIENCE REVIEW 16:(62) pp. 9-26. (2015)

35 Considerable controversy has been stirred by the prevention of the Constitutional Court of Hungary from enacting norm control procedures while the national debt is greater than half the gross domestic product. In a way, the new constitution's legislators declared a state of financial emergency, pending until the achievement of financial stability.

## **PHILOSOPHY AND THEOLOGY**

### **БОГОСЛОВИЕ ОБЩЕНИЯ: ОПРЕДЕЛИТЬ – ЗНАЧИТ ОГРАНИЧИТЬ**

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***Ishchuk N. Theology of communication: to determine – means to restrict.***

***Annotation.*** The article is devoted to clarifying the theological status of theology of communication. Topical approaches to this phenomenon are considered in the context of the traditional understanding of communication in Christian theology.

***Keywords:*** theology of communication, eucharistic theology, communication, koinonia, theological status, modernism, the principle of complementarity.

Вопрос: «Что такое богословие общения?», – все чаще становится предметом не только теологических, но и научных дискуссий. Интерес к проблеме понятен. Предполагается, что для христиан это новое веяние может стать способом переживания/осмысления вечных истин, традиционно транслируемых Церковью миру. Потребность таким образом донести суть христианской веры человечеству выражается в теологических и философских концепциях. Закономерно, что разнообразие, создающее ярчайшую идейную палитру, сопровождается определенными сложностями в его научном осмыслении. Тем не менее уже сейчас очевидными становятся закономерности, наиболее просто проявляющиеся через анализ круга вопросов, связанных с его рассмотрением, что обуславливает актуальность нашей статьи.

Общение не просто неотделимо от христианского богословия, а является его неотчуждаемой основой. Посредством понятия «общение» выражается событие ипостасей Бога в себе, Бога и человека, человека и человека в Боге, Бога и христианского сообщества. Согласимся с митрополитом Ионном (Зизиуласом), наиболее признанным представителем богословия общения в его православном варианте, общение – это «онтологическая категория», вне которой «нет никакого настоящего бытия» [4]. Это проявляется в связи койнонии с тринитаристикой, христологией, экклезиологией, литургикой, а также теoантропологическими, этическими и социальными идеями христианства. Так, тринитарный догмат основан на понимании Троицы как нераздельной Единицы, пребывающей во взаимном общении и единстве любви. Говоря словами Библии, «Отец есть Отцом только по отношению к Сыну, Сын есть Сыном только по отношению к Отцу, Дух есть Дух только по отношению к Богу, который сходит» (Ин 15:26). Представители православия определяют эту библейскую истину в понятии «перихорезис»

(греч.  $\mu\epsilon\tau\alpha\sigma\omega\mu\alpha\tau\iota\varsigma$ ), которое толкуется как взаимное общение и взаимопроникновение ипостасей Божественной Троицы. Христологический догмат апеллирует к бытию Христа – Бога (Слова, Логоса), Второго Лица Троицы, ставшего человеком для того, чтобы слово Божественное стало словом человеческим. Идея Бога, сообщающего Себя Самого через дар Своего Слова, “когда пребывающее вовек Слово вошло во время... Его Слово стало плотью”. (Ин 1, 14) проходит через всю христианскую традицию и актуализируется в современном христианском богословии

Экклесиология общения делает акцент на церкви как основном пространстве христианского общения, месте встречи и диалога человека с Богом посредством молитвы, таинств (особенно, таинства евхаристии), литургии. Важно, что экклесиология общения сегодня выступает точкой соединения христологических, теoантропологических, литургических аспектов богообщения. Это закономерно, ведь церковь - не только пространство богообщения, но и общения христиан друг с другом через Бога. Теoантропологические аспекты богословия общения связаны с сотворением человека по образу и подобию Божию и в общении с Богом, наделенного способностью к речи, предназначенной прежде всего для того, чтобы образ Образа сохранить. Из опыта встречи и разговора с Творцом вырастает новое понимание антропологии как приближения человека к своему Создателю и образу Божьему в себе, вершиной которого есть обожение. Имеется в виду «собрание» духовных сил и глубокие онтологические изменения человеческой природы. Экстраполяция этой парадигмы на уровень межличностного общения порождает дискурс кинонии-сопричасности, своеобразного братства по выбору, призванного объединять людей через Бога с Богом и друг с другом. Более широкий социальный контекст конституируется посредством парадигмы соборности (кафоличности) - христианского учения про наиболее оптимальную модель коллективной жизни. Воплощение этой модели предполагает, во-первых, единство мистического тела самой церкви, а, во-вторых, воссоздание единства многих людей на основе общей любви к абсолютным ценностям и единства всех в совершенном добре [9, с. 356].

Как видим, общение естественный конструкт для христианского богословия. Богословие, как совокупность религиозных доктрин о сущности и действии Бога и система прославления Бога, есть словом о Боге и словом Богу. Оно включает в себя практику богообщения, подразумевающую веру в молитвенное устремление к Богу как предмету веры, упования и любви; дискурсивную практику усвоения человеком систематизации и изложения вечных богооткровенных истин, церковного опыта веры и богообщения. В богословии общения (евхаристическом богословии) оно понимается как живой духовный опыт и начинается с встречи Бога и человека. Собственно, и сам акт творения Богом человека является не только действием, но прежде всего общением. Акцент первичности богообщения по отношению к другим формам взаимодействия Творца и творения прослеживается у всех его представителей: Д. Станилоае, И. Зизиуласа, И. Романидис, Х. Яннараса, Г. Мадзаридиса, И. Конгара и других. Общение с Творцом есть одновременно и призванием и даром, который может длиться вечность при условии, что человек

готов их услышать и принять. Первым значимыми собеседниками для Бога были Адам и Ева. Сейчас же продолжается диалог между Богом и отдельными личностями, христианской общиной. Говоря словами Х. Яннараса, каждый человек находится лицом к лицу к Богу [12, с.14]. Никакое теоретизирование не является богопознанием. Богопознание – Божественная благодать, раскрывающаяся людям посредством синтеза мистических, интуитивных, эмпирических, рациональных компонентов в процессе живого опыта койнонии.

Вопрос заключается в другом: чем вызвано и насколько оправдано с теологических позиций усиление этого дискурса в современной христианской мысли, какова перспектива этих процессов? Являются ли они проявлением так называемого обновленства в христианской теологии?

На данный момент концепт «богословие общения» не закреплён ни в одном конфессиональном документе. Большинство представителей христианской церкви, обсуждая близкую тематику, предпочитают высказываться в терминологии койнонии/ сопричасности/общения/общности. Не упоминается термин «богословие общения» и теми представителями Церкви, которые считаются его идейными вдохновителями, например, митрополитом Ионном (Зизиуласом). Даже клирики, вербализующие словосочетание «богословие общения», обычно говорят об экклезиологии общения, евхаристическом богословии, фиксируя дополнительную (выделено нами. - Н.И.) богословия общения к экклезиологической проблематике.

Православный священник Адальберто Майнаради утверждает, что богословие двадцатого столетия, сосредоточившись на экклезиологии, актуализировало понятие общения, которое стало «ключевым в современном экклезиологическом дискурсе» [6, с. 36-37]. Аналогичным образом высказывается архимандрит Кирилл (Говорун). Он обращается к модели Церкви как таинственного общения, акцентируя внимание на потенциальной возможности языка экклезиологии общения стать конвергационным для различных богословских традиций [1, с. 58]. В целом, такой подход приводит к актуализации экуменического дискурса, ориентированного на воссоздание единого сообщества христиан, живущего в сопричасности и в соборном духе.

Апология богословия общения прослеживается и у представителей российской религиозной среды С. Чурсанова и Г. Завершинского. Если Сергей Чурсанов подходит к этой проблеме опосредовано, анализируя понятие Лица в христологии через феномен общения, по сути, разрабатывая антропологию общения, то Георгий Завершинский оперирует термином «богословие диалога», делая акцент на тринитарном догмате. То есть он обращается к тринитаристике общения. Хотя, как справедливо отмечает отечественный православный теолог Сергей Бортник, в концепции богословия диалога Г. Завершинского прослеживается «смешение разнородных идей» [2, с.110], упомянутые авторы в своих работах транслируют фундаментальные положения рассматриваемой нами концепции: отнологическую значимость общения для божественного бытия; оживотворение человеческого

бытия путем вхождения человека в общение з Богом; первичность богообщения по сравнению с богопознанием.

Существуют и иные, плюральные подходы к его теологическому статусу: от признания значимости богословия общения для будущности христианства до критики его как формы модернизма. Например, современный украинский философ Александр Филоненко считает богословие общения «третьей традицией», находящейся «в пространстве между софиологией и неопатристикой» и составляющей «самостоятельную и плодотворную традицию богословия, находящуюся в отношении дополнительности к названным» и предназначенной преодолеть наметившийся в них разрыв между умозрением, аскетикой и этикой, что делается через обращение к порождающему опыту встречи [10]. Развивая идеи А. Филоненка, отметим, что на наш взгляд, по отношению к исследованию евхаристического богословия принципы «третья традиция» и «дополнительность» являются ключевыми. Но, наш взгляд, область их применения – шире, универсальней. В данном случае речь может идти не только о его потенциальной возможности быть «средним путем» между отдельными теологическими веяниями и концепциями, а, например, между религиозным консерватизмом и модернизмом. То же касается принципа «дополнительности». Кроме близости к эkkлезиологическому дискурсу оно, применяя герменевтические процедуры, может «дополнить» фактически всю христианскую теологию: от тринитаристики до морального богословия; от христологии – до социальных идей.

Довольно распространенным является рассмотрение богословия общения как формы религиозного модернизма. Так, в «Православной миссионерской энциклопедии» оно определяется как «направление модернизма, возникшее под непосредственным влиянием экзистенциализма, главным современным представителям которого является митр. Иоанн Пергамский [8]. Столь критическое отношение к этому феномену связано не только с влиянием на него «западных» идей, но и вменяемых ему попыток «пересмотра» христианской догматики. Исключительно острые дискуссии происходят в плоскости «вертикального богословия»: тринитарного и христологического догматов. Для того, чтобы понять суть этих обвинений, вспомним концепцию Иоанна (Зизиуласа), в которой наиболее системно изложены основные принципы богословия общения в его православном варианте. В своих главных работах «Бытие как общение»; «Бытие и Инаковость» богослов пишет, что феномен общения укоренен в тринитарном догмате. И. Зизиулас стремится воссоздать христианскую модель личности, проводя аналогию между бытием-в-общении Троицы и бытием-в-общении человека. Его позиция заключается в признании неотделимости бытия Бога и общения из чего следует, что образом бытия Божьего в человеке есть свободное личностное общение. Безусловно, констатирует митрополит, люди греховны, но могут восстановить свою полноту в эkkлезиологической ипостаси. Воцерковление является одновременно и освобождением от тварности бытия и актом трансцендентирования, когда таинство крещения выступает «усыновлением

человеком Бога, идентификацией его ипостаси с ипостасью Сына Божьего» [4], возвращением творения к своему Творцу. Личностное бытие суть не только самость (hypostatic), но и преодоление границ самости (ecstatic) во взаимоотношениях с Другим [5, с. 274]. Видим, что у И. Зизиуласа звучит два мотива: с одной стороны, особая близость человеческой личности Христу, а с другой стороны, мотивы ее тринитарности, осуществления в себе образа лиц Пресвятой Троицы, пребывающих в непрестанном общении. Именно усиление тринитарного аспекта понимания человеческой личности вызывает неприятие среди консервативного «крыла» православного клира. Так, один из противников богословия общения Джон Бэр, защищая альтернативную тринитарной христоцентричную модель личности, утверждая, что образом Бога и есть Христос, человек же может только стремиться уподобиться этому образу. Любые попытки приуменьшить значения этого образа недопустимы, так как равносильны «затенению личности Христа». Это противоречит не только духу христианства, но и достигнутому в XX столетии консенсусу, согласно которому «быть по образу Бога означает быть личностью в общении, изображающей три личности в общении на небесах...но Христос сам по себе является образом Бога, и быть по образу Божьему означает соответствовать Его образу путем со-распятия с Ним и принятия Креста» [13]. Добавим, что, например, в современном православии эта дискуссия трансформируется в споре двух концепций – «богословия общения» и «богословия подражания Христу». Однако в истории православной богословской мысли они отнюдь не равноценны. Как замечает по этому поводу С. Бортник, в то время как «богословие подражания Христу» является вполне традиционным, «богословие общения» представляет собой новую концепцию, ставшую известной лишь во второй половине XX века и актуальной для современного христианства [2].

Важно понять, что любые инициативы религиозного обновления, развития, модернизма – неоднозначные сложные явления, имеющие широкую амплитуду, отличающиеся механизмами, глубиной и направлениями трансформаций. Касательно механизмов обновления, то их исчерпывающе рассматривает современный украинский теолог и философ Юрий Чорноморец на примере неопатристики. Механизмы таковы: первоначальная критика модернистами «ложных теологических систем» и возвращение к стилю мышления, которое считается парадигмальным; последующая попытка воссоздания буквы и духа той истинной богословской парадигмы при помощи понятий и теорий, актуальных сегодня, но близких по духу к первоначальному образцу; формирования ответов на мировоззренческие потребности современного человечества посредством актуализированного в современных концепциях святоотеческого мышления» [11]. Амплитуда и глубина трансформаций – различны. Так, в одном случае могут предприниматься попытки пересмотра догматических формулировок и культовой практики; в другом, когда церковь «обновляется без обновления», отвечая на «вызовы» современности, этого не происходит. Совсем иная ситуация, когда инициативы исходят от отдельных, даже влиятельных представителей церкви,

сама же церковь никак не декларирует своих намерений, как это обстоит с евхаристическим богословием.

На социальном уровне задача модернизационных процессов в теологии заключается в том, чтобы привести религиозные представления в соответствии с уровнем сознания современного общества, по возможности, адаптироваться к миру и адаптировать мир к себе. Аналогичным образом обстоит дело и с рецепцией новшеств со стороны общества. Они с легкостью популяризируются среди интеллектуалов и молодежи, и только в исключительных случаях – охватывают значительное количество мирян. В этой связи показательной является констатация факта популярности богословия общения среди молодежи со стороны православного священника Владимира Зелинского [3]. О чем свидетельствует такая популярность, если она действительно есть? Прежде всего, про близость идей богословия общения мировосприятию коммуникативно активной части христианской паствы. Вместе с тем, возможное (но не доказанное) распространение богословия общения среди молодежи не предвещает неизбежности его дальнейшей популяризации.

Еще одна закономерность: в любом случае модернизационные процессы в теологии с самого начала исходят из интеллектуальной, церковной или (и) внецерковной среды. Анализируя идейный мейнстрим, благодаря которому появилось евхаристическое богословие, лишь частично согласимся с уже названным нами выше современным православным богословом и писателем прот. В. Зелинским, утверждающим, что «богословие общения – это не интеллектуальное изобретение нашей эпохи, а скорее новое осмысление или сегодняшнее проживание того, что было с самого начала, что мы слышали, до чего касались руки наши... (1 Иоанна, 1:1)» [3]. На наш взгляд, все же не стоит приуменьшать его интеллектуальную составляющую. Свидетельство этому – работы таких его представителей, как Г. Бальтазар, Д. Станилоас, О. Шмеман, И. Зизиулас, И. Романидис, Х. Яннарас, Г. Мадзаридис, П. Неллас, И. Конгар, А. Любак, Ж.-М. Роже Тилляр, Д. Бонхеффер, Ю. Тишнерн. Анализ их концепций позволяет отметить плюрализм философских влияний философии диалога, экзистенциализма, коммуникативной философии, феноменологии и постфеноменологии и других. Например, ведущий представитель православного варианта богословия общения И. Зизиулас в своих монографиях, посвященных общению, кроме обширного пласта религиозной философии в ее историческом и современном дискурсе, апеллирует к философии К. Барта, М. Бубера, Э. Левинаса, Г. Гегеля, Е. Гуссерля, Ж. Деррида, У. Джеймса, С. Кьеркегора, Ж. Лакана, И. Пригожина и многих других [5]. Оговоримся, апелляция к идеям определенных персоналий не равноценна их безусловному принятию. Но, очевидно, доказывает активную заинтересованность христианских теологов философскими концепциями и идеями, частичную ассимиляцию их теологией. Как отмечает Ю. Чорноморец, в современной православной теологии наблюдаем отказ «от классического типа рациональности и тенденцию ее сближения с феноменологией, герменевтикой, экзистенциализмом, коммуникативной

прагматикой, которые открывают новые горизонты для теологии [11].

Среди других из возможных подходов к евхаристическому богословию - попытка его рассмотрения, согласно формальным критериям, в русле теологии родового падежа. Имеется ввиду тематически обусловленный тип теологии, называемой католиками теологией родового падежа в силу того, что «существительные, определяющие основной термин названий (Теология), стоят в родовом падеже [7, с. 28 ]. Например, «теология женщины», «теология развития», «теология освобождения», «теология солидарности» и т.д. Но, наш взгляд, феномен койнонии в христианстве не локализуется не за структурными, не за тематическими, не за какими-либо другими критериями, что делает такой поход редуccionистским, методологически не корректным по отношению к исследуемой проблеме.

**Выводы.** Подводя итоги, констатируем факт: богословие общения (евхаристическое богословие) существует как динамичный поток, наполняемый все новыми идеями. Не представляя собой целостной завершенной теологической линии, оно характеризуется такими атрибутами: признанием онтологической значимости общения для божественного внутрипостасного со-бытия; признанием этой значимости для личностной экзистенции и оживотворение человеческого бытия путем вхождения человека в общение з Богом; первичность богообщения по сравнению с богопознанием. Общение (койнония) является естественным конструктом для христианской теологии, что проявляется в его связи с тринитаристикой, христологией, экклезиологией, литургикой, а также теoантропологией, этическими и социальными идеями христианства. Вместе с тем, богословие общения терминологически и концептуально не закреплено ни в одном конфессиональном документе, что свидетельствует про отсутствие у него официального теологического статуса.

На наш взгляд, существует несколько возможных подходов к его рассмотрению с позиций религиоведения. Среди них: его исследование как возникающей самостоятельной теологической традиции; «среднего пути» между отдельными теологическими веяниями и концепциями, возможно, между религиозным консерватизмом и модернизмом; его рецепция на основе принципа «дополнительности», который может быть применим фактически ко всей христианской теологии; подход как к форме религиозного модернизма с дальнейшей дифференциацией за степенью глубины трансформационных процессов. Более локализованные подходы: исследование его как интеллектуального веяния, возникшего среди некоторой части клира и «внецерковных» философствующих кругах; и наконец, рассмотрения, согласно формальным критериям, в русле теологии родового падежа.

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## ТЕОЦЕНТРИЧНОСТЬ МИССИИ В СОВРЕМЕННОМ ПРОТЕСТАНТСКОМ БОГОСЛОВИИ

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***Rusin I. Theocentricity of mission in modern protestant theology.***

***Annotation.*** *The article deals with the transformations in the understanding of the mission by Protestant theology. The process of forming a mission must begin with the formation of missionary hermeneutics, which recognizes Scripture as a missionary phenomenon and will allow the formation of a mission in the whole Scripture, and not on individual texts. The mission, in spite of the fact that it seems that the action of the Church is in fact an attribute of God. God's mission establishes the Church and its mission. Since the Church is established by God's mission, it is missionary in its very being. The Church, therefore, has no other mission other than to participate in the mission of the Father, the Son and the Holy Spirit. In view of this, the Church should view the world as a target environment for stay and ministry. The fact that the mission is God's mission is also demonstrated by the fact that Christ is the incarnate model, the archetype of the mission of the Church.*

***Keywords:*** *modern theology, Protestantism, mission theology, dialogue theology, ecclesiology.*

Традиционно миссия рассматривалась как функция Церкви, которая создает миссию, ставит перед ней цели, достигает их реализации. Современная теология переосмысляет концепцию миссии, рассматривая ее как действие Бога.

На смену парадигм в современной миссионерской теологии обратили внимание Д.Бош, Л.Ньюбинг, К.Райт. Однако, будучи сами активно вовлеченными в создание современной богословия миссии, эти авторы не смогли дать обобщающего объективного анализа радикальных трансформаций.

Целью данной статьи является попытка комплексного анализа трансформации теологии миссии в современном протестантизме от еклезиоцентричной к теоцентричной парадигме.

Чтение Писания через призму миссионерской герменевтики позволяет увидеть, что не человек и не Церковь являются источником и вершителем миссии, но сам Бог. Миссия, в первую очередь, есть атрибут и действие Бога [2, р. 427]. Она начинается в сущности Бога, во взаимоотношениях и деяниях Отца, Сына и Святого Духа, которые Он явил в истории и Он открыл в Писании. Миссия – в первую очередь, Божья Миссия, которая является источником и определяющим фактором любой другой миссии [64, р. 68]. В современной миссиологии концепция Божьей миссии обозначается латинским термином *Missio Dei*, который, в нынешнем значении, ввели Карл Барт и Карл Гертенштейн, после знаковой миссионерской конференции в Веллингтоне в 1952 году [53].

В своей совокупности, книги Библии открывают нам Бога как Троицу – совершенная любовь и вечное общение Отца, Сына и Святого Духа [64, р. 69]. Поскольку Бог как Троица есть вечное общение и любовь *ad intra*, это свойство определяет или же продолжается и *ad extra* [25]. Божья любовь не есть нарциссическая любовь, направленная во внутрь, на себя. Напротив, она есть любовь направлена вовне [43, р. 28]. Бог создает человека по Своему образу и подобию, что предполагает и делает возможными взаимоотношения между Творцом и человеком. Бог не остается тайной, но открывает и интерпретирует Себя человеку, становится доступным человеку, участвует в жизни человека. Творение человека и откровение Себя человеку есть инициатива любви и творческое деяние Отца, Сына и Святого Духа, обусловленное Его сущностью, но не являющееся сущностной необходимостью.

Божья принципиальная открытость и любовь к человеку не ограничивается откровением, но является главным мотивом и движущей силой искупления человека, в котором также, как и в сотворении и откровении, участвует Троица. Бог Отец, как Творец всего и Господь всех берет инициативу спасения человека на Себя. Он посылает Своего Сына в мир, Который действуя в соответствии с волей Отца и силой Святого Духа совершает искупление падшего человечества. Далее в мир посылается Дух Святой, Который актуализирует искупление в жизни верующего и является божественным укрепляющим присутствием в жизни Церкви в мире [63, р. 75; 53]. Сын учреждает новую общность Божьего искупленного народа – Церковь, которая посылается в мир участвовать в миссии Отца, властью Сына и в силе Святого Духа (Ин. 17:18; Деян. 1:8) [64, р. 72; 26, р. 212]. Дух Святой сопровождает Церковь в миссии, наделяет ее всем необходимым для совершения обусловленных для нее Божьих намерений в мире.

В свете всего вышесказанного, становится очевидным, что Бог как Троица является источником, инициатором и исполнителем миссии. Миссия является выражением Его природы как Троицы, есть результатом Его искупительных дел в отношении человека и мира. Поэтому всегда, когда речь идет о *Missio Dei* имеется ввиду *Missio Trinitas* [43, р. 27]. Божья открытость к человеку и Его деяния ради человека, особенно выраженные в посланничестве Иисуса и Святого Духа указывают на миссионерскую природу и миссионерскую активность самого Бога [64, р. 69]. Таким образом, Бог может быть назван первым и главным миссионером [Там же]. Он есть миссионер и у Него есть миссия по отношению ко всему миру и ради блага всего мира. Эта миссия иницируется Его неисчерпаемой любовью и суверенной волей, совершается Его абсолютной властью и могуществом через Его постоянное присутствие и деяния в мире. Все Писание повествует о Божьей миссии к человечеству.

Поскольку существует только один Бог, есть только одна миссия – Божья миссия. Все остальное может быть только частью и инструментом Божьей миссии, если совершается под главенством Бога и в соответствии с Его миссией [19, р. 874-876]. Вне Божьей миссии нет никакой другой миссии. Его Миссия есть первичная

реальность, которая дает начало и формирует суть всего, что призвано быть частью и инструментом Его миссии [47, р. 36]. Основание и сущность миссии, таким образом, есть и должно быть только теоцентричным и тринитарным, а не антропоцентричным или экклессиоцентричным. Теоцентричное и тринитарное понимание миссии помогает идентифицировать не только источник и главную движущую силу миссионерства, но и ее конечную цель. В свете *Missio Dei* конечной целью миссии есть слава и владычество Бога – Царство Небесное [49, р. 19]. Через Свою миссию Бог демонстрирует власть над историей, наделяет историю смыслом и ведет ее к подлинному завершению, которым является Царство Божье. Божья Миссия, таким образом, – нечто большее, чем искупление людей, но вместе с этим, – преобразование всего творения в соответствие с изначальной интенцией. Другими словами, конечная точка миссии есть возврат к начальной точке истории – к абсолютному владычеству Бога, гармонии Бога и человека и человека с человеком и остальным творением.

Теоцентричное и тринитарное понимание миссии также ведет к переосмыслению мотивов миссионерской деятельности. Уже не греховность человека или страх адских мучений катализирует миссионерскую активность, но всеобщее поклонение Богу, как Владыке мира и совершителю спасения [10, р. 13]. Реальность греха и наказания не отвергается, однако акцент смещается с человека на Бога [64, р. 69]. Яхве есть подлинный Владыка мира. Каждый человек должен узнать об этом и начать поклоняться Ему, ибо именно в поклонении Яхве человек восстанавливает все смыслы своего бытия. Бог есть источник и, следовательно, подлинная цель человека.

Концепция *Missio Dei* помогает видеть Бога присутствующим и действующим в этом мире и во взаимодействии с человеком. В Иисусе он действительно Эммануил – Бог с нами. Бог не только присутствует в мире, среди людей, но активно действует в этом мире совершая свои спасительные деяния в этом мире и ради этого мира. Он не только источник миссии, но и ее вершитель, который последовательно реализовывает Свои благие намерения. Он учреждает и уполномочивает инструменты для Своей миссии и только Он производит результаты, силою Своего Духа [45, р. 240; 26, р. 212]. Поэтому вся слава принадлежит только Ему. Любые инструменты Его миссии, будь это Израиль или Церковь, лишены ложного триумфализма, ибо результаты миссии обусловлены Божьим действием, а не человеческим [63, р. 71].

Вопрос природы Церкви и ее миссии является очень актуальным в настоящее время. Мольгман прав, утверждая, что «самый сильный импульс к обновлению богословской концепции Церкви исходит от богословия миссии» [49, р. 7]. Тем не менее, богословие миссии, которое зиждется на миссионерском чтении всего Писания и мыслит миссию в первую очередь как *Missio Dei*, не только мотивирует осмысление Церкви и ее миссии, но и раскрываются сущностные элементы Церкви и ее миссии, которые ранее оставались без внимания.

Церковь является результатом и орудием Божьей миссии. Божья миссия предшествовала Церкви и учредила Церковь как свой принципиальный инструмент. Не Церковь инициирует миссию, но Божья миссия инициирует Церковь и определяет ее миссию. Церковь исходит из миссии, а не миссия из Церкви [49, р. 10]. Таким образом, Церковь есть следствием, символом и средством Божьей миссии в этом мире. Она посланник, а не посылающий, инструмент, а не источник миссии. Божья миссия полностью определяет миссию Церкви, ее цели и ее средства. В свете *Missio Dei* цель миссии Церкви не есть Церковь и ее расширение, но наступление Царства Божьего.

Поскольку Церковь была учреждена Божьей миссией и как инструмент этой миссии, она является миссионерской по существу [9, р. 7]. Миссия – бытийное или же «врожденное» свойство Церкви, а не отдельная, пусть даже самая главная, функция Церкви [43, р. 30]. Миссионерство – это основа идентичности Церкви, ДНК ее природы [5, с. 298]. Несмотря на то, что длительное время миссия рассматривалась как дело и функция церкви, миссия – это то чем Церковь является, а не то, что Церковь делает. Вследствие фрагментарного подхода к Писанию и попыткой обосновать миссию отдельными текстами миссия часто рассматривается как долг и обязанность Церкви. Однако в свете *Missio Dei* – миссия есть не повинность, а дыхание и выражение жизни Церкви, как миссионерского сообщества в самой своей природе. Миссия была главной причиной возникновения Церкви и поэтому миссия является главным свойством Церкви.

Миссия как бытийное свойство Церкви говорит о том, что миссионерство – дело всей Церкви и основа каждого ее действия [16]. Миссия не может быть сведена к деятельности отдельной категории людей и ограничена евангелизационными проектами. Миссия есть Церковь в действии, а не действие Церкви [60, р. 41–42]. В свете *Missio Dei* правильней говорить не о Церкви и миссии, а о миссии Церкви. Миссия настолько определяет сущность Церкви, что фраза «немиссионерская Церковь» является внутренне противоречивой фразой, ибо Церковь не может быть немиссионерской [2, с. 408].

Осознание Божьей открытости к миру и собственной миссионерской природы и предназначения, делает Церковь способной видеть мир как свою целевую среду пребывания и служения. Бог любит этот мир и, следуя примеру Иисуса Христа, Церковь направляется в этот разрозненный и страждущий мир, неся в себе Евангелие Царства. Поскольку мир есть не только арена Божьих искупительных деяний, но и их цель, Церковь направляется не сопротивляться миру или отрицать мир, но своим честным возвещением и сострадательным служением изменять его [2, с. 441]. Цель Церкви не есть «спасение от мира, но спасение мира самого» [15, с. 250]. ]. Она по своей природе существует ради блага мира, ради блага людей, которые не являются ее частью [2, с. 410]. Церковь является Церковью только когда существует ради других, когда видит себя не убежищем от мира, но общиной существующей ради спасения этого мира [2, с. 234]. Поэтому, являясь орудием Божьей миссии, Церковь должна постоянно пребывать в мире, будучи не от мира.

Мир со всеми своими проблемами и вызовами никогда не должен ускользнуть из поля зрения Церкви. Только когда Церковь преодолевает стойкое искушение извлекать себя из мира и изолировать себя от мира, она способна слышать мир, видеть его нужды, открывать миру его подлинное состояние и полноту его призвания [5, с. 306]. Церковь, которая бежит из мира лишает себя способности и возможности быть своевременным голосом Божиим в среде мира, быть предощущением Царства Божьего в среде разрозненного царства человеческого. Тогда она «пророчесствует после события» или же говоря другими словами, решает вчерашние проблемы. Ее служение не пророческое, а ситуативное, хотя должно быть все наоборот. Устранение себя из мира, закрытость от мира, существование для себя, ограничение своей деятельности храмовым и жреческим служением, на самом деле является предательством миссионерской сущности Церкви [8, с. 93].

Поскольку *Missio Dei*, есть выражение внутренних отношений и внешних деяний Троицы, участие Церкви в Божьей миссии есть участие в жизни Троицы и ее деяниях которые, которые охватывают всю вселенную и всю историю. Значимость миссии Церкви становится очевидной так же и тем, что миссия Церкви наделяет смыслом историю между воскресением и паруссией и связывает эти два события в одну последовательную историю [24, р. 157]. Хотя миссия есть Божья миссия, Церковь имеет привилегию быть частью великой Божьей миссии, служить основным орудием этой миссии. Участвуя в этой миссии, Церковь действует не своей силой, но властью и силой Духа Святого, который непрерывно сопровождает, направляет и оснащает Церковь в миссии [62, р. 191]. Бог совершает Свою миссию в Церкви, посредством Церкви и до Церкви, когда через *preparatio evangelica* создает благоприятную почву для миссии Церкви [63, р. 71].

Современные богословы подчеркивают, что Божьи намерения являются не ориентиром, а нормативом и мерилom для миссии Церкви. Однако, Церковь подвержена искушению навязывать свою миссию Божьей миссии или же позволять другим институтам навязывать их миссию миссии Церкви.

**Выводы.** Процесс формирования миссиологии должен начинаться с формирования миссионерской герменевтики, которая признает Писание как миссионерский феномен и позволят формировать миссиологию на всем Писании, а не на отдельных текстах. Миссия, несмотря на то, что кажется действием Церкви на самом деле есть атрибут Бога. Он есть миссионер и миссия есть Его миссия, которую Он инициирует и вершит, как Бог Отец, Сын и Дух Святой. У Церкви, таким образом, нет иной миссии кроме участия в миссии Отца, Сына и Святого Духа. Ввиду этого Церковь должна рассматривать мир как целевую среду пребывания и служения. Перед Церковью стоит постоянная необходимость контекстуализировать себя и свое послание в изменившихся или новых культурных контекстах. Форматом миссии Церкви должно быть целостное служение, состоящее из честного возвещения Евангелия и приобретения учеников, а также сострадательного служения и социального действия. В фокусе миссии Церкви, которая является участием в Божьей миссии находятся все народы мира. Власть Бога абсолютная,

любовь всеобъемлющая и поэтому миссия Церкви должна охватить всех и каждого.

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## JUSTICE VALUE IN LEGAL PHILOSOPHY HISTORY

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**Annotation.** *The article reflects the results of the study of the historical dynamics of legal justice understanding in the European philosophical-and-legal tradition. The value of legal justice even in old times has been considered as an objective justice belonging to the order of legal ideal implementation. In new times the discovery of a subjective justice form has occurred, and the Postmodern epoch allows to understand the value of inter-subjective dimensions of the value. The inter-subjective dimension of justice intermediates between the subjective and objective justice.*

**Keywords:** *legal justice, legal axiology, legal ontology, virtue, complex theory of justice.*

Legal axiology is being actively developed in Ukrainian legal philosophy as a separate research field due to new achievements in the legal ontology field. Papers of S.I. Maximov [1], O.P. Dzeban, E.M. Manuylov [2], T. Podkovenko [3], A. Baumeister [4; 5] have become the most significant. Attention of modern law philosophers was drawn by ontological status problems of legal values, and law justice nature. In the same time, the necessity to clarify the historical dynamics of legal justice understanding in the European philosophical-and-legal tradition becomes more evident.

The complex theory of justice as features of a man and society was created by Plato, when constructing own social-and-political Utopia [6]. In the same time he used the antic order intuition as a normative state of the Universe standing against the chaos. Legal justice is always considered as a part of a proper order state. According to Plato, the justice for a soul is a harmonic state supposing a balance of rational, volitional, emotional features. The balance is possible, if all soul features are subdued by the mind. Though, Plato names the justice as the highest virtue, it really depends on wisdom, and mind virtue. For a country the justice is an ideal state featured by wisdom. Justice submission to ideals of ruling intellectual class doesn't allow to Plato to consider the legal justice concept in its specificity. Plato's pessimism is seen in the statement that justice perversion gradually brings the entire world to the degradation state, and gods decide to rearrange the world again. Thus, in platonism the justice is seen actually as a basic value, but not the highest one. Nicolay Gartman writes about it: «Among the virtue values the justice shall be named rather as the lowest virtue, but not as the highest virtue. It is seen in the fact that existence oughtness in it expresses the minimum of moral requirement, but not the maximum. Justice requirement for man's conduct, first of all, is negative: it is not allowed to do something wrong, abuse, breach the other people freedom, or cause damage to other people property. This is for sure is expressed in the Ten Commandments: don't kill, steal, fornicate, bear false witness or want the other people property. If this is the entire sense of justice, then its tendency is exclusively protective, but not creative. Protection of lower, elementary benefits are meant here:

life, property, family, etc. If the justice is confined to these, then it is only the instrument value of the benefit values» [7, page 404]. It is obvious that Plato's understanding of the justice doesn't know the precise division into legal and moral justice, and these two aspects are parts of the wide concept of world order, and the concept is expressed in the Decalogue as a value. In the same time Plato's justice moral-and-legal value mission was in overriding the egoism. Nicolay Gartman describes the justice aspect in the following way: «The first and approximate sense of justice is the tendency that stands against rough individual egoism. An egoist in own desire to possess life benefits adheres to the following position: all is for me, and I don't care about what is left for others. Justice stands against with the opposite tendency: not all is for me, but the same benefits shall be possessed by me and others» [7, page 402]. The equality requirement means that the right for other benefits, freedom in in this achievement shall be provided for all people [7, page 403]. Solidarity becomes the certain condition of the moral-and-legal justice and its providing for a society [7, page 406–408]. The idea that the justice is the lower value means rather its higher fundamentality and greater potential of implementation. N. Gartman also writes: «...the highest principles are dependable on lowest ones, but not vice versa. Hence, the highest principle is more conditioned and dependent, and in this sense is weaker. The lowest principle in this sense is more elementary, non-conditional and strong. Inversion of the relationship, probably, is possible in abstraction, but it is not confined in the existence of the principles [7, page 530]. Therefore, though I. Kant considers the right as the highest manifestation of human spirit, it is basic for humanity. Indeed, unlike animals, a man is free in own activities. On one hand, the freedom creates the possibility of moral evil and crime, whereas on the other hand this freedom creates the possibility of legal society arrangement to guarantee limitation of evil and create conditions for achieving common welfare. As K. Voytyla states, freedom creates the possibility of legal community, and understanding of justice values pushes forward to such creativeness. The solidarity feeling allows to open higher metrics of a social state associated with humanity understanding as a moral unity, but not as a simple legal society. Namely, the solidarity feeling compels a man to seek for not only legal justice, but social justice as well, which is expressed, at least, in the equality of social capabilities. Due to the fact separation of the legal justice in its purity for value consciousness is a theoretical and practical victory.

Distinction of legal justice within idealistic mindset became possible thanks to Thomas Aquinas [9] due to highlighting the following law varieties. Firstly, «God's law», according to which the world order is created. This law is higher than justice since stipulates the priority of grace and love. Secondly, the «natural law», which defines the main values, toward which the legal order shall be oriented, including the justice. Thirdly, there is a «written law», i.e. adopted official state regulations. Fourthly, always there is a «real law» as the practice of applying the legislation. The third and fourth law types shall correspond to the «natural law» to establish the legal reality. According to modern interpretation of Thomas Aquinas natural law concepts, the law consists of legal justice values, social solidarity and subsidiarity values. Legal justice plays a role of a

foundation for social life, whereas solidarity is the society coupling force, which Aristotle calls as soul necessary to activate the legal order at real social environment. Subsidiarity allows to achieve solidarity between various society branches. Modern interpreters of Thomas Aquinas add personal freedom value to the values that constitute the natural law. The natural law of Thomism founder consists rather of three natural soul dispositions. First disposition is toward self-protection; it defines the «don't kill rule» (i.e. don't kill yourself and others). The second constituent of the natural law, which prescribes to think about the propagation (future generation), obliges to bring up own children and forbids divorce. The third constituent of the natural law prescribes humans to perceive God and live the social life. The tendency teaching led to human freedom limitations from the side of government and church as two main institutions of the medieval period. However nowadays, this thomistic segment is not important any more, thus the first place is occupied by the teaching on values and corresponding virtues. Discussions on right grounds other than moral laws, values and virtues are actualized due to the book of A. McIntyre «After the virtue» [10]. Criticism of law ethics or oughtness ethics, out of which main legal principles were derived, was the main goal of the book. A. McIntyre states that in reality the ethics always reflects a certain way of life defined by society traditions. This way of life leads to forming a set of virtues in a person, i.e. some persistent habits to behave oneself in a way. The oughtness itself, for instance, I. Kant's categorical imperative, cannot be effective, since it doesn't have enough energy to implement itself, and without striving or habit to live virtuously it always will be ephemeral. Let's note that the virtues themselves and virtue ideas corresponding to them are also powerless for the implementation and need personal creative freedom. When we force a person to live properly with obligations imposed by a law, or a person is inspired by moral appeals, including the habit to live properly (which is the essence of virtue), this all doesn't make sense for a legal system.

S.I. Maximov correctly points out to the fact that logic of A. McIntyre relativizes the justice concept through reducing it to a human virtue existing within local traditions [1, page 297]. Of course, N. Gartman is right in stating that justice as a value, defining a corresponding virtue is versatile, though its manifestations are relative. Sense of justice as a value had been appeared gradually as legal conscience and culture developed. If in old times the most important was the idea of order, and justice was often considered as rational legitimacy, then in modern times the idea of possible self-determination became central. Always, the idea of equality was important for justice value, but in modern times not the equality in general became important, but equality of all before law. In the second part of XX century the idea of human rights becomes the main content of legal justice, since a free person is the main value of the epoch [1, page 276]. Union of various aspects of justice value makes possible the holistic understanding of justice, which allows to discover the relationship of various aspects of legal reality. The justice idea, being the provision of human freedom and rights, reflects the transcendental dimension of legal reality and the idea of rights. Thus, the justice as equality of all before law and provision of harmonic public peace are related to the written law and law enforcement. It is fully

logical that in modern legal philosophy the liberal concepts underline the first aspect, whereas the legal positivism is focused on the second dimension of the legal reality. Our delimitation of two main aspects is close but not identical with delimitation of subjective and objective justice of S. Maximov. «According to two dimensions of social existence, i.e. personal and institutional dimensions, there are two justice concepts: a) justice as a personal feature, which was related by Plato to four main human virtues together with discretion, courage and wisdom (subjective justice); b) justice associated with social institutions (objective justice); first of all, it is political justice related to the realm of rights, state and politics» [1, page 279–280]. However, the objective justice is included into the transcendental dimension together with the subjective justice to the same extent. Thus, we rather speak of internal and external dimension of the justice phenomenon as a legal value. These two dimensions are necessary to construct the legal justice in general, with no dependence of personal legal behavior or social institution conditions. Within platonism the justice belongs to a person as a virtue, but one can't say that it is subjective in the new European sense. In fact, justice belongs to a person only due to the fact that the person is a part of a state.

The Postmodern epoch makes central the problem of power source to implement the legal ideal. Solidarity and justice as love minimum becomes the most important source of power. Thus, the inter-subjective dimension of justice is being discovered. A subjective side alone doesn't have motivation powers, whereas the objective side has enforcement means. An inter-subjective legal community supports subject's assurance for justice implementation. However, punishment inevitability, equability of all before law are the foundations of legal culture aimed at achieving justice. Therefore, the inter-subjective dimension of justice intermediates between the subjective and objective justice.

**Conclusions.** Study of historical dynamics of a justice value in European traditions allows to prove that the value even in old times has been considered as an objective justice belonging to the order of legal ideal implementation. In new times the discovery of a subjective justice form has occurred, and the Postmodern epoch allows to understand the value of inter-subjective dimensions of the value.

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## LAW

### ВЛИЯНИЕ КАНОНИЧЕСКОГО ПРАВА НА РЕГУЛИРОВАНИЕ СОЦИАЛЬНО-ЭКОНОМИЧЕСКИХ ПРОЦЕССОВ ПРАВОМЕС: ДОКТРИНАЛЬНЫЙ АСПЕКТ

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*Ermakova A. The influence of the canon law on the legal adjusting socio-economic processes by the EU law: the doctrinal aspect.*

*Annotation.* It was made the analysis of the essence and the nature of the canon law, the peculiarities of its legal adjusting on certain spheres of social relations were determined. The main characteristics of legal adjusting through canon law, especially the spheres of its application were disclosed. It was identified the mechanism of the canon law's influence on the socio-economic processes regulating.

*Keywords:* canon law, legal adjusting, EU, integration, national legal systems.

Актуальность исследования процесса влияния канонического права на регулирование общественных отношений в ЕС проистекает из активизации политической и общественной роли католической церкви в лице Ватикана и особенно Папы Франциска I. Чаще всего личность Папы не имела значения в процессе влияния католической церкви на общественную жизнь Европы. Безусловно, исключительными примерами следует считать Пап Пия XII и Иона Павла II, однако именно с Папой Франциском I связывают основной взлет влияния Церкви на политические, общественные и даже, социально-экономические, процессы в единой Европе. Церковь не только стала ментальным аксиологическим мерилем системы европейских ценностей, но и пробует влиять через правопонимание и правосприятие и на процессы общественных отношений. Такое влияние возможно в силу наличия у Церкви собственной правовой системы – канонического права, нормы которого выходят далеко за исключительно церковные отношения, логично и естественно вписываясь в качестве регуляторов общественных отношений светского характера.

Проблематика влияния канонического права на регулирование социально-экономических процессов в ЕС в рамках собственной европейской системы светского права получила отображение в работах многих ученых, например таких как Ю. В. Бондаренко, Д. Д. Боровой, В.П. Гавриков, В.В. Лазор, Дж. Левис, Р. Мец, Дж. Недангат, И. Г. Оборотов, С.С. Сливка и т.д.

Говоря о праворегулирующем влиянии норм канонического права на общественные процессы в ЕС следует, прежде всего, понимать не прямое

воздействие самой канонической нормы. То есть мы принимаем отсутствие императивного влияния конкретной религиозной нормы (нормы канонического права) на форму, модель и характер общественных отношений и поведения в них индивидов. Вместе с тем сам характер отношений и сама природа модели поведения человека она во многом резонирует с характером регулирования отношений посредством норм канонического права. Так или иначе, но церковь и религия несут в себе кроме духовных ценностей еще и определенную гносеологическую миссию, давая возможность индивидам понять характер и способ существования в земном мире, который церковь считает праведным.

Каноническое право, церковное право, Святое Писание, прочие церковные тексты, энциклы, буллы и любые другие любого устанавливающего и определяющего характера церковные предписания не могут в светском государстве быть нормами прямого действия, не могут определять напрямую модель и способ реализации физическими или юридическими лицами их воли. Более того, светское государство напрямую ограничивает правоустанавливающее влияние церкви на общественные процессы, определяя для нее лишь роль духовного ориентира для общества.

Это объясняется, прежде всего, тем, что монопольное право на регулирование общественных отношений имеет как раз легальная светская власть разделенная на три ветви. Но вместе с тем, правоустанавливающая сила государства не может сравниться с силой и влиянием церкви в плоскости духовных потребностей и ценностного мировосприятия. И более того, имен ценностные ориентиры, устанавливаемые церковью и формируемые в религиозных догмах, в последствии определяют характер поведения самих индивидов. Но не могут повлиять на правоотношения настолько, насколько влияют нормы законодательных и подзаконных актов.

Каноническое право в свою очередь может считаться лишь отражением религиозной доктрины, ограниченной однако в своем практическом применении, в своей утилитарности относительно регулирования тех отношений, которые осуществляются без участия церковных (религиозных) элементов. Но это отнюдь не свидетельствует о том, что каноническое право полностью отрезано от общественных отношений, от общественных процессов. Дело в том, что светскость государственной власти не означает полный отказ от тех или иных концептов мировосприятия, которые среди прочего формируются и в религиозной среде. Светскость означает ограниченное влияние церкви на все те процессы, которые в той или иной степени регулируются нормами права, что есть проявлением легализации определенных моделей отношений со стороны государства.

Как отмечает в своих исследованиях Д. Д. Боровой «каноническое (церковное) право – это объективно существующая система религиозно-правовых норм, регламентирующих устройство и положение церковной организации, порождаемые ею отношения и взаимодействие с другими общественными организациями и с государством. Вместе с тем, значительная часть указанных отношений не

подвергается государственно-правовому воздействию, а регулируется посредством норм канонического (церковного) права, как особой, исторически сложившейся нормативной системы социального регулирования» [2, с. 7]. Таким образом, можно сделать вывод о том, что каноническое право это самостоятельная система права, существующая в рамках осуществления отношений субъектом или элементом которых всегда будет религиозная организация, церковь.

Доктринально каноническое право представляет собой совокупность канонов, т.е. церковно-религиозных предписаний регулирующих исключительно внутренние аспекты функционирования церкви. Но современное каноническое право, распространяет свое влияние гораздо дальше, не ограничиваясь исключительностью субъектного состава, обязательным требованием к которым должна быть принадлежность к церковной иерархии. В это связи очень точно делает вывод В.П. Гавриков, который отмечает, что «европейское каноническое права формулирует те принципы построения общественных отношений, которым светское право для соблюдения христианской морали должно придать обязательный характер. Каноническое право католической церкви в Европе является не территориальным, а персональным и выступает в качестве одной из межгосударственных правовых систем» [3, С. 127]. На самом деле данный вывод является абсолютно верным, поскольку каноническое право охватывает своим влиянием более двадцати стран ЕС и современной Европы.

Следует заметить, что формально каноническое право сохранило свое влияние над рядом процессов, таких как, например, духовные обряды и таинства, имеющие прямое воплощение в нормах семейного или гражданского права: крещение (наречение именем), венчание (бракосочетание) и т.д. Сохранив такое влияние формально Церковь тем не менее стремится доказать свою состоятельность и в дальнейшем быть определяющей силой в процессе регулирования общественных отношений, особенно что касается интеграционных отношений в рамках ЕС.

Более того, даже сам тот факт, что ЕС охватывает собой исключительно христианские страны, исповедующие в большинстве своем именно католическое учение, а церкви, которых подчинены Ватикану – даже этот аспект демонстрирует реальность влияния религиозной доктрины на публично-политические процессы в ЕС. При этом Церковь не давит над светскими правительствами, не чувствует прямо и непосредственно в процессе законотворчества и нормотворчества, не стремится подчинить государственный аппарат. Дело в том, что территориальное распространение влияния канонического права не просто широко географически, но и имеет яркую локальную направленность – на общинном уровне (уровне наименьшего административно-территориального образования государства). Церковь распространяет свое влияние через мировоззрение индивидуумов и общества в целом.

Таким образом, достигается важный и необходимый эффект неотторжения канонического права, его принятие как отдельной (параллельной или рядоположенной) системы регулирования общественных отношений. Дело не в

том, чтобы принимать нормы канонического права в качестве единственных императивов поведения в процессе осуществления общественных отношений. Дело в том, чтобы создать необходимое основание для ориентира на эти нормы. Тогда интеграция ЕС представляется собою совершенно естественным процессом расширения границ в обществе с единой системой цивилизационных ценностей, с единым мировоззрением и мироощущением.

Как отмечает И. Г. Оборотов «каноническое право вполне соответствует всем признакам правовой системы. Каноническое право можно определить как персональную правовую систему, основанную на христианских религиозно-правовых предписаниях, воздействующую на общественные отношения, возникающие между членами Церкви (в том числе, по поводу церковного устройства и управления), Церковью и иными религиозными и общественными организациями, государством, пользующуюся специфическими методами канонико-правового воздействия» [6, с. 279]. Но при этом следует обратить внимание на то факт, что церковные отношения или канонико-правовая сфера взаимодействия Церкви и общества одновременно основываются на нормах канонического права, которые включают в себя весь аспект правовых явлений с обязательным указанием на специфический субъект – религиозный элемент (церковь в целом, священнослужители, религиозные организации и т.д.) и нормах светского права.

Светское право не проникает императивом в канонико-правовые отношения, но является единственным ориентиром при реализации Церковью собственной правосубъектности в общем доктринальном смысле. Правосубъектность Церкви не может исходить из канонического права, не может регулироваться и определяться его нормами. Более того, говоря о ЕС и об интеграции в рамках ЕС на сегодняшний день определяющей тенденцией в правовом регулировании отношений в рамках ЕС является унификация национальных правовых систем. Для канонического права данное явление чуждо, но при этом Церковь не имеет абсолютно идентичные правовые статусы в различных государствах, а регулирование деятельности Церкви осуществляется исходя из особенностей национальных правовых систем.

Но право ЕС, унифицируемое в процессе интеграции различных правовых систем в единое правовое пространство вырабатывает единую концепцию регулирования религиозных отношений. Религия представляется для права ЕС неотъемлемым элементом общественных процессов; построения гражданского общества; элементом системы демократических прав и свобод.

Религия определяет в свою очередь каноническое право, но светское право не может определять каноническое право, в данном случае светское право выступает мерилom возможностей или рамок расширения регулирующего влияния нормами канонического права. Обобщая и упрощая можно сказать, что светское право является системой императивов в развитии права канонического.

По мнению Л. В. Петровой каноническое право «является сверхъестественно-правовой, духовно-нравственной ценностью, а не системой норм. Эти ценности

как метафизическая совершенство заключаются в высших моральных добродетелях, которые проповедует религия» [7, с. 34]. Это дает возможность сделать следующие выводы:

- каноническое право определяет степень духовности человека, модель религиозных отношений, моральные императивы индивидуума и моральные ценности общества;

- каноническое право распространяя свое влияние на отношения человека и Церкви тем самым формирует у человека восприятие социально-экономической реальности необходимое или принимаемое Церковью;

- каноническое право резонирует или диссонирует с правом светским и тем самым формирует точки бифуркации правосознания индивидуума и общества, с тем, чтобы в последующем создать основу для эволюционирования обеих систем права;

- каноническое право едино для европейского общества, но Церковь имеет разную степень правовой детерминации модели своего поведения и правового режима функционирования в различных национальных правовых системах стран-членов ЕС.

Как утверждает И.И. Шамшина наиболее важным и действенным проявлением регулирующей роли канонического права заключается в способе его воздействия на правоотношения, и в том числе на правоотношения в процессе интеграции ЕС. Доктринально – правоотношения это всего лишь форма общественных отношений где мериллом кроме морали выступает и норма права [9, с. 26]. Как утверждает В.В. Лазор «правоотношения в каноническом праве – это правовая связь между субъектами канонического права, основанная как на нормах внутреннего церковного права (в том числе - догматах веры), так и на нормах внешнего церковного права. Правоотношения в каноническом праве имеют свои особенности, обусловленные спецификой влияния норм канонического права на общественные отношения» [4, с. 25]. То есть исследователи связывают проникающее взаимное влияние канонического и светского права в процессы регулирования общественных отношений на совершенно частном уровне – уровне правоотношений между индивидами, в том числе если предметом таких отношений выступают религиозные нормы, учения, догмы или церковные обряды таинства. Экстраполируя данную точку зрения на процессы интеграции ЕС и правовое регулирование отношений возникающих в рамках таких процессов можно говорить о том, что каноническое право совершенно утилитарно, поскольку одной из его особенностей является способность заменять правовой вакуум, который образуется в силу недостаточности внимания государства к регулированию тех или иных общественных отношений. То есть применение норм канонического права осуществляется не путем переноса или прямого использования канонических источников права. Речь идет об имплементации механизма правового регулирования из системы канонического права в систему национального права государства-члена ЕС.

Более, того, говоря о поддном влиянии на процессы регулирования общественных отношений в рамках интеграции, следует скорее всего говорить о возможности имплементации норм канонического права не в национальные системы, а напрямую в право ЕС.

Исходя из этого, можно сделать вывод относительно ряда особенностей норм канонического права в различных конфессиях и ответвлениях католической церкви.

Очевидно, что в классической Католической церкви «каноническое право представляет собой систему законов и правовых принципов, принятых и осуществляемых иерархическими властями Церкви, чтобы регулировать ее внешнюю организацию и управление, а также ориентировать деятельность католиков на миссию Церкви [14]. В «Европейкой Латинской Церкви каноническое право, основанно прямо или косвенно на неизменном божественном праве или естественном праве, и получает официальную легитимизацию от высшего законодателя (Верховного Понтифика), который обладает совокупностью законодательных, исполнительных, и судебных полномочий, в то время как отдельные канонические нормы легитимизируются светской властью [11, с. 80]. Вместе с тем, ряд ученых [10; 13] отмечает отсутствие прямого следствия между провозглашением или утверждением Папой Римским тех или иных норм канонического права и из непосредственным правоприменением, даже по отношению к сугубо церковным каноническим отношениям. Особенно это проявляется в тех церквях, которые провозгласили или стремятся провозгласить независимость от Ватикана.

В частности в Великобритании современная англиканская церковь создавая нормы канонического права, по существу определяет лишь моральные императивы поведения индивидуумов или моральные векторы развития общества. Так, по мнению Х. Поли «каждая провинция или церковная община в Англии привносит свою собственную особенность в каноническую правовую систему англиканства в соответствии с принципами канонического права, общими для Святого Писания, но отличающимися по своей утилитарности между общинами. Эти принципы обладают сильной убедительной властью и имеют основополагающее значение для самопонимания каждой из церквей, они содержат в себе возможность дальнейшего развития. А само существование этих принципов демонстрирует единство и способствует развитию общественного сознания внутри англиканской общины [15, с. 124].

Исходя из этого, можно предположить, что существует две системы взаимоотношения норм канонического права и норм права национальных правовых систем. Так, на глобальном уровне механизм взаимного влияния норм канонического права и норм светского права можно представить следующим образом (рис. 1).

На локальном же уровне, нормы канонического права влияют лишь на определение меры поведения для отдельных субъектов и индивидуумов. То есть

имеют субъектную ориентацию или объектную специфику.

Поэтому говоря о степени и мере влияния канонического права на процессы интеграции в ЕС следует прежде всего понимать, что такое влияние осуществляется на глобальном уровне в процессе взаимного проникновения и синхронного переплетения норм, ценностей и механизмов регулирования общественных отношений средствами канонического права и средствами национальных правовых систем.



Рис. 1. Механизм влияния канонического права на регулирование социально-экономических процессов

**Выводы.** Подводя итоги, следует обратить внимание на ряд ключевых выводов:

Во-первых, нами установлено, что каноническое право – это совокупность норм-регуляторов, основное влияние которых ориентировано на упорядочивание придание динамики отношениям между обществом и Церковью, отдельными индивидами и Церковью, между субъектами Церковной иерархии. В этом аспекте каноническое право представляет собой интерес только как система, регулирующая специфическую сферу общественных отношений, выносимую светской властью за поле основного праворегулирующего воздействия.

Во-вторых, каноническое право способно своими нормами покрывать те сферы общественных отношений, которые по разным причинам оказались вне зоны внимания правового регулирования органов государственной власти, в

частности законодательных. В контексте интеграции ЕС именно данная особенность и характерная черта канонического права представляет наибольший интерес, поскольку нормы канонического права могут быть тем связующим и обобщающим элементом, унифицирующим различные по природе своего правового регулирования национальные правовые системы. Правда такое обобщающее влияние не имеет долгосрочный характер и может считаться лишь временной мерой.

В-третьих, анализ механизма взаимного влияния норм канонического и светского права дает возможность определить степень проникновения религиозных догм в процессы правосознания. Кроме того, становится возможным охарактеризовать особенности восприятия правовой действительности с учетом системы ценностей сформированных на аксиологических представлениях человека, черпаемых им из религиозных доктрин.

Все это определяет полученную в процессе исследования новизну научных результатов:

- получил дельнейшее развитие тезис относительно возможности восполнения пробелов правового регулирования различных аспектов общественных отношений за счет норм канонического права;

- усовершенствован механизм влияния канонического права на регулирование социально-экономических процессов.

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## **ENGINEERING SCIENCES**

### **THEORETICAL PREREQUISITES FOR THE CREATION OF A LOWER LEVEL SYSTEM FOR MONITORING THE TECHNICAL STATE OF THE COMBUSTION CHAMBER**

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**Annotation.** *The article analyzes the existing technical means, mathematical methods and models with which you can monitor the technical state of the combustion chamber. The initial data for developing the lower level of the control system was pressure, temperature, and also the concentration of carbon dioxide.*

**Keywords:** *combustion chamber, carbon dioxide, pressure, temperature.*

**Problem statements.** Ukraine's gas transport system includes 36,000 km of gas mains for various purposes and performance, 71 compressor stations (122 compressor stations), more than 1600 gas distribution stations, 12 underground gas storage facilities with the largest active gas volume in Europe after Russia - over 32 billion m<sup>3</sup>, or 21 , 3% of the European active capacity.

Recently, a significant part of the main technological equipment of the gas industry is approaching its deadline, which is why the energy efficiency and reliability of the gas transportation system is decreasing.

The energy efficiency of the operation mode of compressor stations (CS) depends largely on the type and number of gas pumping units (GPU) installed at the compressor station, their energy parameters and technological operating modes. An important role in the efficiency of the gas compressor unit is played by the combustion chamber of a gas turbine unit (GTU), the reliability of which depends on the reliability of the entire gas compressor unit (GPU).

The analysis of existing methods, models, technical means for controlling emissions of harmful substances from the combustion chamber allocates[1,2]:

1. Method of vibration control of technical condition of combustion chamber of the gas pumping unit (GPA).
2. Calculation methods for determining pollutant emissions of substances.
3. The efficiency increase of drives of gas-pumping units.
4. Optimization of transported gas flows.
5. Implementation of the gas turbine modernization and repair system gas-pumping units according to technical condition.

#### 6. Reduction of methane emissions when switching off the gas compressor unit.

Taking into account the above, the topical question is to develop an adequate system for monitoring the technical state of the combustion chamber of the gas pump unit, which will allow continuous monitoring of the output values of pressure, temperature, and also the concentration of carbon dioxide [3].

**Key findings.** The main materials for the study were mathematical methods and models, technical means of monitoring the technical state of the combustion chamber and software of Siemens Simatic Step-7. The program SIMATIC Step-7 is structured. It means that it consists of blocks with certain functions, formed from networks (networks) or chains (rungs). STEP 7 works with variables of various data types, starting with binary variables (data type BOOL - logical), then with numeric variables (data types INT or REAL for computational tasks), ending with complex types of data, such as arrays or structures (one variable from a combination of variables of different types).

The system provides the ability to monitor the current state of the program, available with any programming language, provides not only for debugging the software, but also for troubleshooting hardware, connects even if it does not have diagnostic tools.

Based on the original data and also on the basis of the proposed technical (an exhaust gas pressure sensor, an exhaust gas temperature sensor and a LAND probe), a lower level of the system was created in the STEP 7 software environment, where the type and directory of saving the project files for the system being developed [4].

The main working windows of the lower level of the system: the creation and formation of a symbol table ( fig. 1-2).

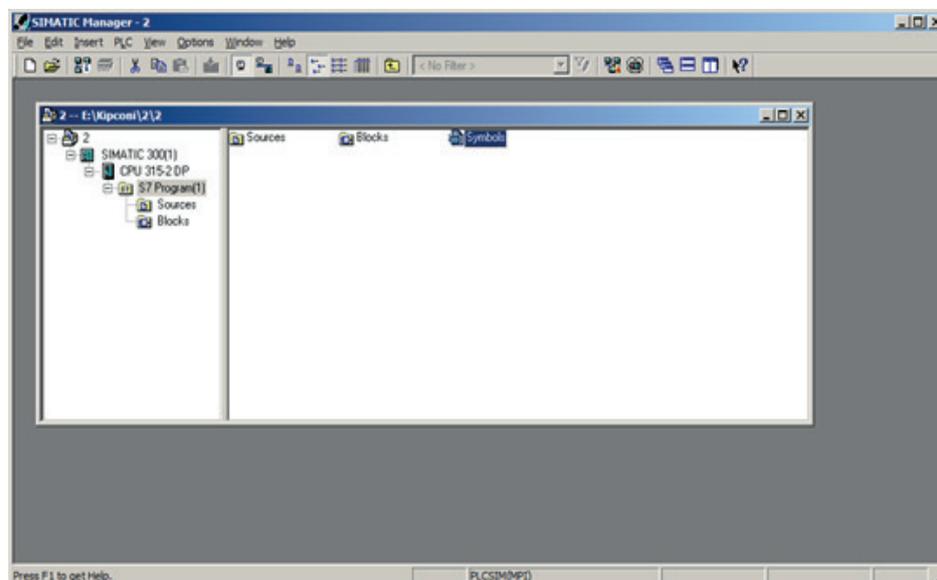


Figure 1– Creating a symbol table

Status	Symbol	Address	Data type	Comment
1	CRP_IN	FB 2	FB 2	
2	false_bit	M 250.0	BOOL	Установлено в 0
3	true_bit	M 250.1	BOOL	Установлено в 1
4	TT1	MD 10	DWORD	Нормованый сигнал з давача температуры
5	PT1	MD 20	DWORD	Нормованый сигнал з давача тиску
6	CO2	MD 30	DWORD	Нормованый сигнал з давача Глянда
7	t1	MD 40	DWORD	Допустиме значения температуры
8	p1	MD 50	DWORD	Допустиме значения тиску
9	co2_1	MD 60	DWORD	Допустиме значения CO2
10	bit1	M 0.0	BOOL	Перевищено допустиме значения температуры
11	bit2	M 0.1	BOOL	Перевищено допустиме значения тиску
12	bit3	M 0.2	BOOL	Перевищено допустиме значения CO2
13				

Figure 2 – Forming a symbol table

Go to the tab Blocks (fig. 3).

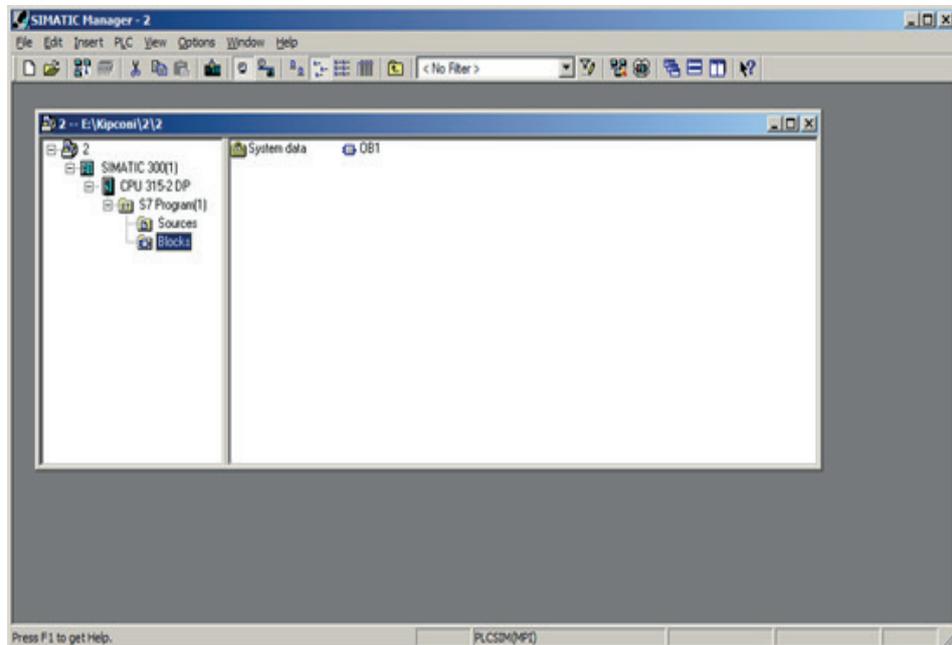


Figure 3 – Tab Blocks

Creating a data block:



Figure 4 – Data block with initial parameters

Creating a data block in which the permissible values of temperature, pressure and CO2 are located (fig. 5).

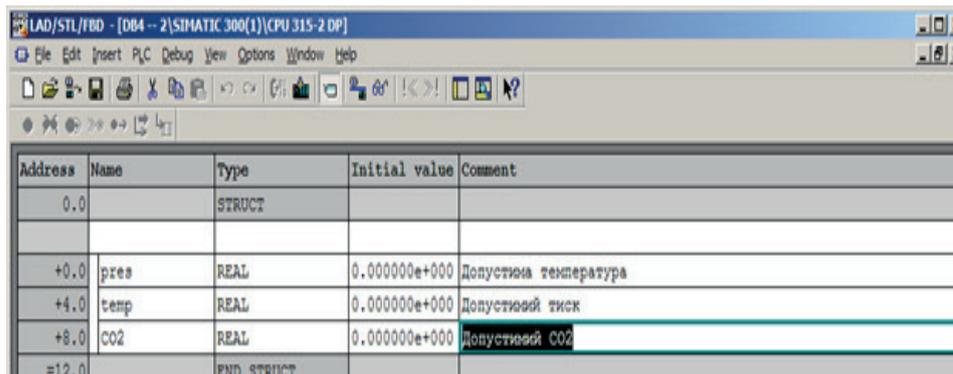


Figure 5 – Temperature, pressure and CO2 data block

Open the block OB1 (organization block) (fig. 6).

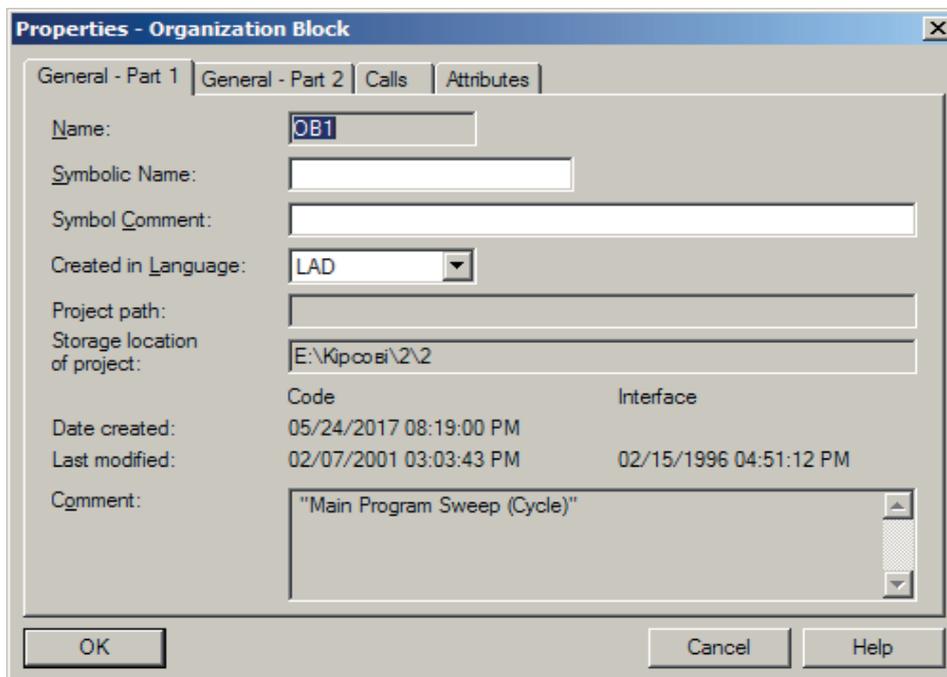


Figure 6 – OB1 block

Normalizing the analog signal from the temperature sensor using the CRP\_IN function from the Pid Modular Cont library (fig. 7).

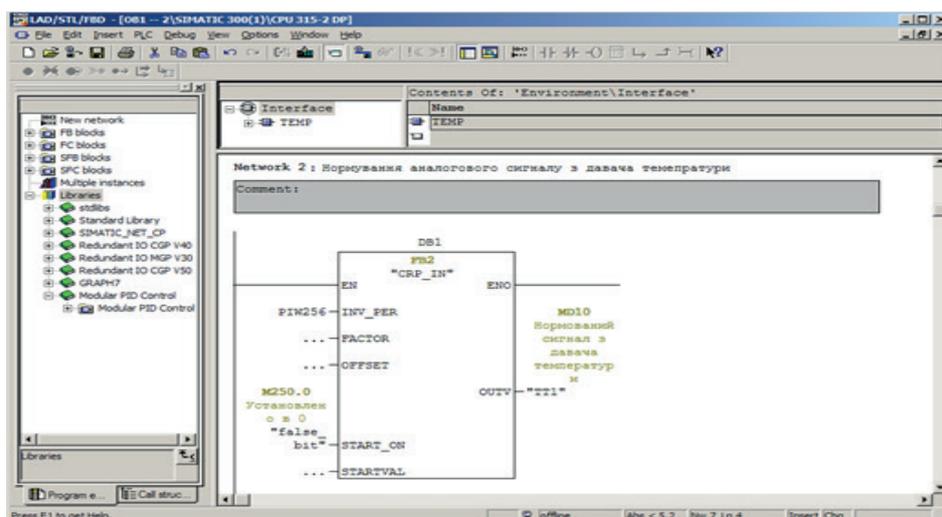


Figure 7 – Normalizing the analog signal from the temperature sensor

Normalizing the analog signal from the pressure sensor using the CRP\_IN function from the Pid Modular Cont library.

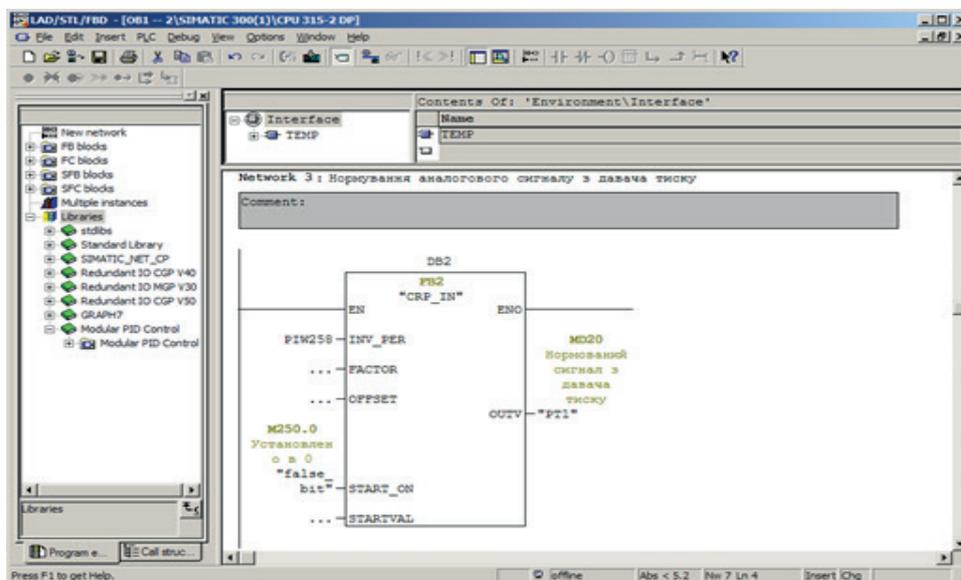


Figure 8 – Normalizing the analog signal from the pressure sensor

Normalizing the analog signal from the lambda sensor using the CRP\_IN function from the Pid Modular Cont library (fig. 9).

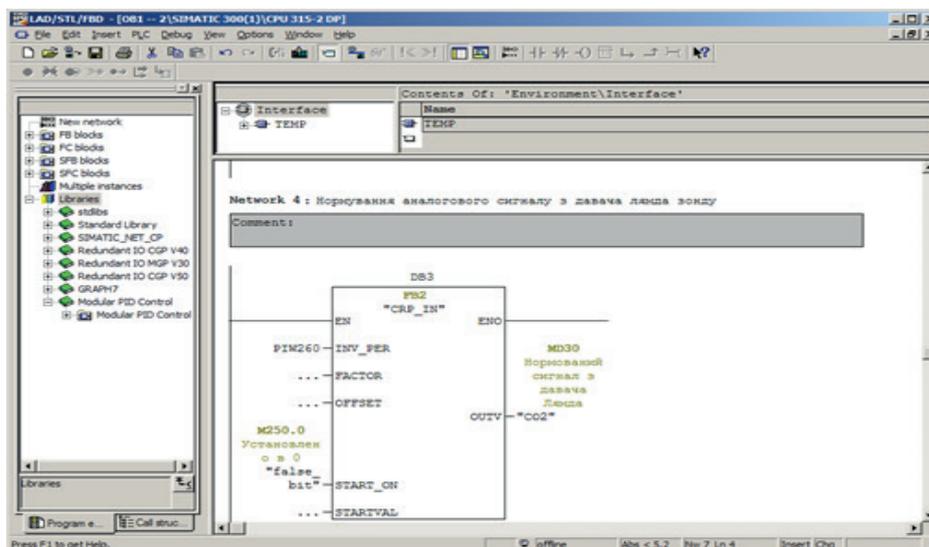


Figure 9 – Normalization of an analog signal from a lambda sensor

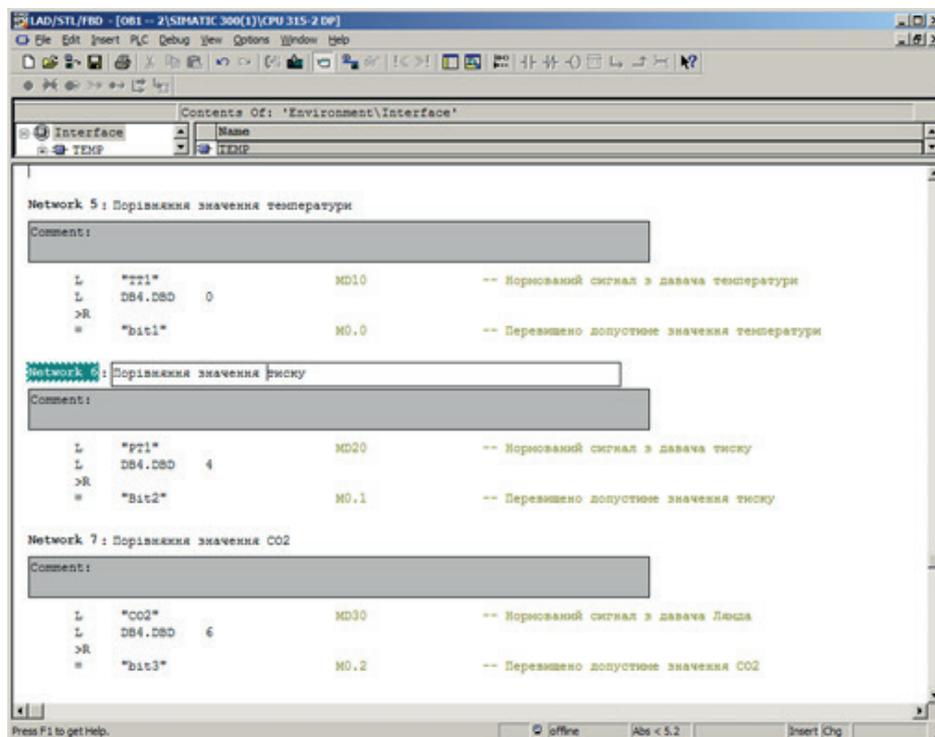


Figure 10 – Comparison of the values of normalized sensor signals

The developed automated system allows for real-time to control the technical condition of the combustion chamber and also allows to control the emissions of harmful substances.

**Conclusions.** The theoretical significance of the results is that they will allow the development of a technical passport (instruction for use) of the combustion chamber control system of the gas compressor unit, training of personnel to maintain the lower level of the system and also to select technical means.

Practical value of the developed system of the lower level of monitoring the technical state of the combustion chamber and controlling the emission of carbon dioxide is to ensure environmental safety of the environment and prevent failures in the performance of the combustion chamber.

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