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DIRECTIONS OF IMPROVEMENT OF FINANCIAL-ECONOMIC POTENTIAL MANAGEMENT SYSTEM OF IRON ORE ENTERPRISES

Summary

This article is based on the idea of optimizing the management system of financial-economic potential of iron ore enterprises. In the paper the basic diagnosis of state of financial-economic potential of the industry over the past five years was conducted. On the basis of analysis the mechanism of improving management system of potential at the industry level was formed. According to it practical directions of optimizing the researched management system of financial-economic potential of iron ore enterprises were presented.

Key words: financial-economic potential, potential management system, iron ore industry, iron ore enterprise, financial-economic planning, financial resources.

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TO A PROBLEM OF CROSS-BORDER CLUSTER SYSTEM SOCIAL EFFICIENCY EVALUATION

Problem of social and economic evaluation for cross-border cooperation is of current concern. The work researches problems of social efficiency evaluation for a meso-level of international integration formations representing intra-branch and inter-branch cooperation in the form of cross-border cluster systems. Principles, criteria and stages are reviewed for evaluation of social effects of cluster formation within a euroregion as an essential and necessary condition of quality progress in European integration for Ukraine.

Key words: meso-level, cross-border cluster system, European integration, euroregion, social effect, budget efficiency, living standards.

Introduction. Cross-border economic space self-organization in the form of socially-oriented clusters is related with changes of targets' landmarks in global economy. Modern economy may be described as an "economy of improved living standards", which encompasses improvement of ecological conditions of habitation and human activities and improvement in the population health level [1, p. 6]. The economy of improved living standards, along with the above formulation determines aims in the social development. Achievement of the stated aims may be provided by knowledge economics with IT, nano-technologies, and bio-technologies as the key trends of its development. This concept pre-determined new types of clusters appearance in euroregions, such as socially oriented clusters.

Cross-border cluster systems (the CBCS) are represented by networks including suppliers, manufacturers and customers residing in adjacent states and concentrated geographically within a eureroregion adjacent to national borders. They cooperate and compete, they are linked in technological chains and complement each other, they cooperate with cross-border institutions, including scientific, educational and business infrastructure, public authorities and international organization in pursue of strategic aim to improve cluster components', regional and national competitiveness. Distinctive feature of cross-border cluster lies in higher significance of macro-economic component as well, as in social aspect of euroregional economic development. Therefore, majority of research is concentrated in the determination of the cluster's contribution into formation of indexes of social and economic development of the territory, in which this cluster is located [2, p. 18].

In Ukraine objectives faced in striving to innovation type of development are associated, in particular, with necessity to generate international cluster systems within euroregional structure. These cluster system face the challenge to generate social effects (externalities). Methodology of evaluation of such externalities seems to the author as an essential problem.

Problems of development of forms and instruments of cross-border regionalism on the quasi-integration basis in terms of newer economic order and newer challenges imposed by global instability are reviewed in works by national economists, such as: B. V. Burkinsky, V. M. Heyets [3], M. I. Dolishniy [4], V. S. Kravtsiv, N.A. Mykula [5, p.130], S. I. Sokolenko, S. V. Filippova, and many others, studying various aspects of development of innovative forms of networked cooperation, including well-grounded strategies of economic growth in view of problems associated with European integration of Ukraine. Works by the enlisted authors determine theoretical and methodological aspects of competitive cluster development. Nevertheless, it is worthwhile to note, that mechanism of formation of cross-border cluster systems in Ukraine is not researched practically, which causes necessity to take a deeper look into this theme.

Statement of research objectives. Aim of the proposed work lies in research of social effects being the cluster externalities resulting from euroregional economic self-organization in the form of cross-border cluster systems in view of their being an essential and necessary precondition of quality advance in European integration of Ukraine.

Results. Social efficiency of cross-border clustering describes a degree of satisfaction with labor conditions and is determined by indicators of pop-

ulation employment, development of euroregional social infrastructure, investments' weight in human resource. Cross-border clustering social effects mean the influence upon various resulting indexes of human resource development, newer life standards for population and euroregion in total produced due to involvement and participation in clusters.

To the author's opinion, a socially-focused cross-border cluster system is an innovative structure integrating manufacturing, scientific educational and administrative spheres of a euroregion into unified system based on principles of informative and technological cooperation, implementing common economic interests of its participants in adjacent states linked with each other with certain corporative culture of mutual relations and generating social and ecological effects.

Stability of economy and further temps of its development depend on capability of a territory adjacent to border to use its unique advantages in successful competition at markets. Essential advantages of a euroregion generated by a cluster may be outlines as a possibility to operate resources efficiently, access to advanced technologies, increase in taxpayers' quantity and taxable basis, expansion in area of cooperation between business and state, resulting in human resource development and life standards improvement [6]. These results are achieved by means of redistribution of resources, progress concentration and overspill effect within a relevant territory. In this aspect, definition of the cluster's budget efficiency are reviewed with direct and implicit budget expenditures to create a cluster should be repaid in the form of additional taxes in the respective budget as well, as new job creation, population living standards improvement, labor conditions improvement, business environmentalization and development of euroregional social infrastructure (social efficiency).

Budget efficiency of a cross-border cluster may be calculated using the formula, as below:

$$E_{bud} = \frac{\Delta T_{rev} + \Delta T_{prop} + \Delta I_{exp} + ... + ... \Delta I_{misc}}{C_{bud}}$$

with

ΔT_{rev} – increase in profit tax revenues;

ΔT_{prop} – increase in property tax revenues;

ΔI_{exp} – increase in budget incomes from export of products or services

ΔI_{misc} – increase in budget incomes from other relevant sources;

C_{bud} – budget investments into CBCS creation.

Efficiency of cross-border cluster operation may be described by means of indexes of euroregional social development. A cluster stimulates preservation and generation of jobs, establishment of civic institutions, forms newer education standards, public health standards, judicial and law protection activities standards, newer consummation standards and population life style standards.

Furthermore, cluster approach is helpful in smothering undesirable conflicts of various nature enabling not only to unite citizens of adjacent states efficiently into newer economic formation based on their self-organization, but facilitates a their prompt transfer from one cluster to another with minimum losses. Such an approach enables to prompt selection of partners in common business, stimulates merging common resources, forming newer creative personalities. Integration associations produce beneficial effects upon social and economic development of cross-border regions, facilitate to European institu-

tions' transplantation into depressive territories and newer socially active and creative personality formation [7, p. 115]. Such structures motivate obtaining certain economic effects at the territories of their location, such as knowledge spill-over effect, common usage of infrastructural objects, demand stimulation effects, investments attraction effect.

Successful cluster development may be determined by efficient activity of supporting branches of economy (i.e. branches maintaining the infrastructure, such as transport, communications, financial services, consulting, logistics, etc.). Social infrastructure is a foundation, on which cluster links are built upon. Associated enterprises impose specific demands to regional social infrastructure. For instance, development rate in transport logistics and information sectors of economy are higher with relatively geographically remote cluster corporations. Scientific research facilitates dynamic development of consulting, patent, scientific and educational institutions. Essential principle of cluster infrastructure development lies in compound funding implemented via mechanisms of business-state partnership. Cluster activity initiates development of minor innovative business [8, p. 418]. Cooperation with minor business enables to maintain innovative manufacturing for cluster corporations and opens up further prospects of production sales.

Essential inherent feature of minor business lies in its flexibility and capability to adapt to changing conditions and situations absorbing quickly newer technologies and knowledge. Development institutions are established for minor innovative business entities within clusters, such as (business incubator zones, technological parks, industrial parks. Service branches being an integral part of any cluster are often represented by minor companies, such as internet providers, carriers, public catering, private security companies, etc. Cluster enables to implement megaprojects in service branches. Progress in service sphere (information, tourism, marketing, education, logistics, etc.) initiated by a cluster may attract investments from budget, public funds, private, including foreign. First of all, it is caused by reduced risks of such a structure which may be supported by guarantees issued by government. Clusters are formed and develop enjoying support of local public authorities and self-administration which is helpful in solving problems of educational and cultural exchange and human resources development. Aims pursued by socially-oriented cross-border cluster lies in social and economic development of peripheral territories and upgrading socially essential infrastructure elements at both sides of national border, improvement of life standards of population in such spheres, as adequate nutrition, improvement of health and mortality index reduction, obtaining knowledge and meeting cultural requirements, providing ecological safety of life and activity, efficient management in housing and public utilities.

Socially-oriented clusters lead to transformations in basic objectives of social policy of states participants of euroregions. They are clusters of a specific type. Their residents apply technologies of future in their activities enabling to achieve leadership in technological markets; to solve social problems of rapid health improvement, human life duration and mortality decreasing, leading to transformation of basic objectives of governments in social policy. Main distinguishing features of such cluster structures caused by transformation of their genetic features are outlined below [9, p. 97]:

· Ex-territoriality and focusing on socially critical economy sectors;

· High dynamics of economic participants and integration with other clusters;

· Cooperation prevailing over competition among the cluster participants and advanced telecommunications sector;

· Self-organization and increased social responsibility of business.

External effect for euroregional authorities is displayed as increase of taxable sphere due to localization of additional corporations in the euroregion and intense innovation processes, reduced costs of manufactured products, increased profitability of manufacturing and improved social and economic situation within the euroregion. Resulting indicator of social and economic development of the euroregion is the growth rate of gross internal product per capita or economy productiveness measured with values of goods and services per unit of human, financial and natural resources.

Reviewing the cross-border cluster as a potential "growth point" functional, structural, institutional and dynamical effects of its activities within the euroregion may be highlighted (Fig. 1).

The following principles should be specified among those applicable for cross-border cluster systems social efficiency evaluation:

- Purposefulness principle;
- Complexness principle;
- Open System Principle;
- Synergy Principle.

Such cluster features, as integrity and multilevel structure enable to draw the conclusion, that social efficiency of cluster functioning should be evaluated from both points of view of individual enterprise in its structure and the entire structure in general. Essential cluster's features research applying the system approach enabled to work out methodology of evaluation of the cluster structure efficient operation, logical sequence of which provides for stages, as follows:

1. Review of existing mutual relations between the cluster participants and revealing integrated structure levels.

2. Identification, classification and grouping of social and economic interests:

а) for participants of integrated structure basing n their scope and nature of activities;

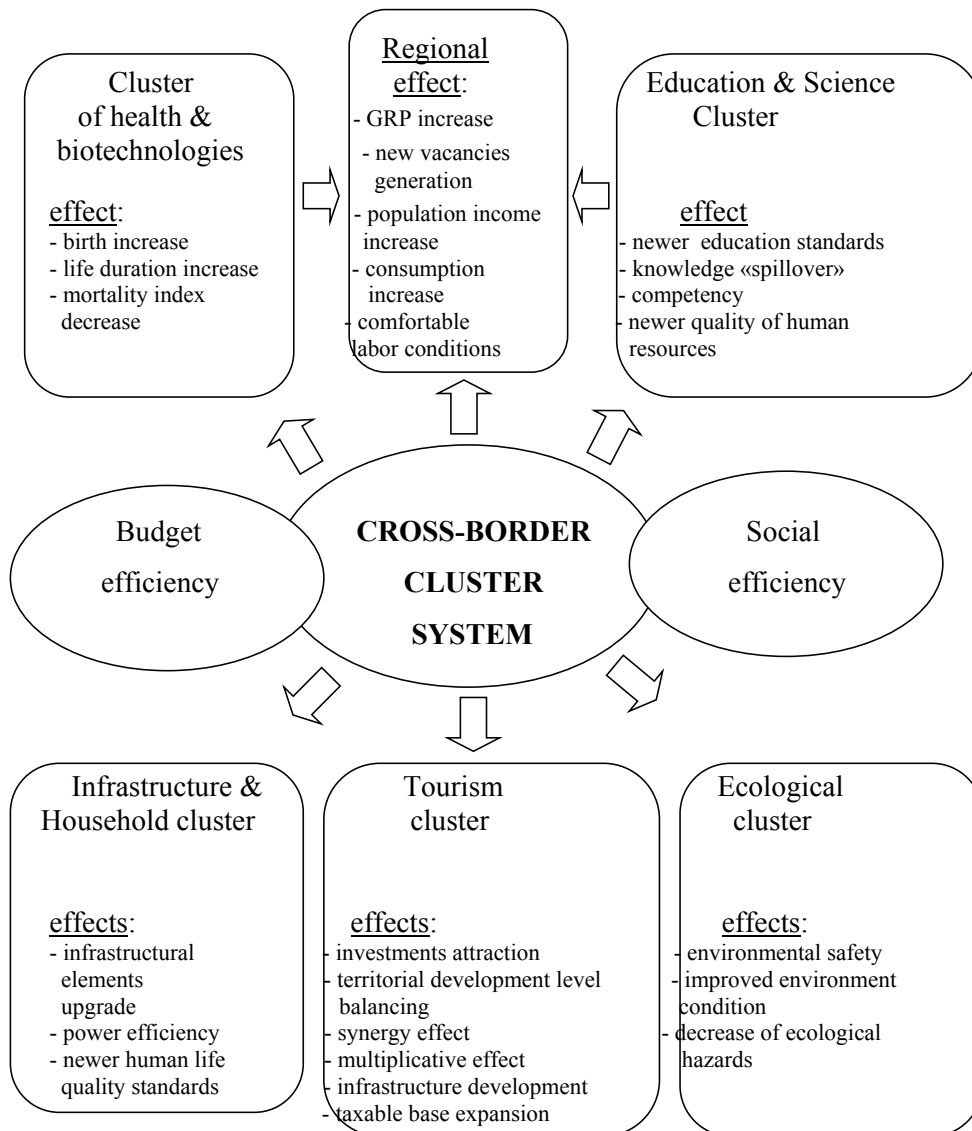б) for structures cooperating or otherwise interacting with the cluster.

Fig. 1. Field of social effects of the CBCS

3. Working out a system of common and individual efficiency criteria of the integrated structure basing on meeting social interests of participants and taking into account indexes of social and ecological efficiency.

4. Calculation and evaluation of indexes of functional and institutional efficiency for cluster integrated structure.

5. Revealing external factors and outlining system of their indexes. At this stage efficiency within the cluster structure should be reviewed as well, as in its contact with external environment and maintenance of its development purposes without any contradictions with national interests and territorial social and economic interests.

6. Calculation of total (integrated) index of efficient integrated structure functioning. Integral efficiency should indicate what social and economic effect is achieved by mutual cooperation of all the cluster participants.

7. Insight of obtained results and development of measures aimed to increase social efficiency of cluster structure operation.

As a variable rate index of social and economic growth at the euroregional level is proposed being logarithm GRP per capita. Variable logarithm enables to minimize asymmetry in economic values distribution and in a number of cases approximates residue regression distribution to normal.

Logarithm GRP per capita represents a function f (possibility of innovative activities, resources quality improvement and quantity increasing, infrastructure development). Among the most essential social effects of clustering some of them should be emphasized. They are increase of employment index, wages level rising, increase of assignments to budgets of various levels and to non-budget funds, development of innovative infrastructure, increase of satisfied demand for touristic and information services, life standards improvement. Therefore cluster formation should provide for deriving budget income and social effects from implementation of any commercial project as well, as formation of growth points at the territory, creation of favorable conditions for accelerated innovations and economic development of euroregion, facilitate to increase it potential of steady development.

To the author's opinion, the proposed system of indexes may enable to estimate social efficiency of cluster formation establishment and functioning with maximum accuracy and comprehensiveness. Express analysis of cluster structure efficient operation in view of practical implementation of enlisted criteria may be performed by means of grade rating model, which may be represented, as follows:

$$I = \Sigma K_i \times B_i, \ (i = I - n),$$

with I – integrated evaluation of a level of practical implementation of social efficiency criteria of integrated structure functioning;

K_i – weight ratio of the ith criterion of integrated structure social efficiency;

B_i – value in points of the ith criterion of integrated structure social efficiency.

Under the reviewed circumstances, the cluster structure efficiency represents a multi-aspect phenomenon displaying both at the meso-level (branch) and at the national level (employment generation, unemployment allowances decrease, taxes increase, increase in currency earnings from export increase, attraction of foreign investments) and euroregional level (decrease of social tension, solving environment protection problems or improvements in infrastructure).

Conclusions.

1. Social effects – cluster externalities are the result of self-organization of euroregional economy in the form of cross-border cluster system as an essential and important condition of quality advance in Eurointegration of Ukraine. In general, social efficiency of cross-border cluster functioning may be determined as a summarized benefit for all the participants including social, budget, ecological and information components. In other words, the social effect in question is expressed as a difference between summarized positive benefits for both external and internal social groups and summarized additional expenditures spent for cross-border cluster establishment.

2. Where the cluster policy represents a core of strategy in euroregional development functional and structural effects display themselves: growth of knowledge-intensive sector of economy, development of newer business culture, and – as a result – improved standards of life and emergence of newer creatively active personality.

3. To the author's opinion general trends in euroregional cluster policy include:

priorities shifting to municipal and peripheral regional levels; government authority leaves direct intervention political approach for that of clusters stimulation; social processes development stimulation; development and improvement of labor resources, development of creative personality and bringing up leaders, i.e. creative managers. It is social orientation, which should construe a new trend in cross-border clusters formation and development.

4. Thus, revealing of clusters' place and part in euroregional economy is determined by their capability to meet interests of not only business and Government, but those of population, as well. Such a conclusion requires developing a methodology adequate to declared problems, which should facilitate to reveal strategic niches for development of cross-border region, determining priorities and instruments of euroregional cluster policy.

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ДО ПРОБЛЕМИ ОЦІНКИ СОЦІАЛЬНОЇ ЕФЕКТИВНОСТІ ТРАНСКОРДОННОЇ КЛАСТЕРНОЇ СИСТЕМИ

Резюме

У статті досліджено проблеми оцінки соціальної ефективності мезорівня міжнародних інтеграційних об'єднань, що представляє собою мережеві структури внутрішньогалузевого і міжгалузевого співробітництва у вигляді транскордонних кластерних систем. Розглянуто принципи, критерії та етапи оцінки соціальних ефектів кластеризації єврорегіону як важлива і необхідна умова якісного зростання євроінтеграції України.

Ключові слова: мезорівень, транскордонна кластерна система, євроінтеграція, єврорегіон, соціальний ефект, бюджетна ефективність, якість життя.

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К ПРОБЛЕМЕ ОЦЕНКИ СОЦИАЛЬНОЙ ЭФФЕКТИВНОСТИ ТРАНСГРАНИЧНОЙ КЛАСТЕРНОЙ СИСТЕМЫ

Резюме

В статье исследованы проблемы оценки социальной эффективности мезоуровня международных интеграционных объединений, представляющего собой сетевые структуры внутриотраслевого и межотраслевого сотрудничества в виде трансграничных кластерных систем. Рассмотрены принципы, критерии и этапы оценки социальных эффектов кластеризации еврорегиона как важное и необходимое условие качественного роста евроинтеграции Украины.

Ключевые слова: мезоуровень, трансграничная кластерная система, евроинтеграция, еврорегион, социальный эффект, бюджетная эффективность, качество жизни.

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ЕФЕКТИВНІСТЬ РЕГУЛЯТОРНОЇ ПОЛІТИКИ В УМОВАХ ІНСТИТУЦІЙНИХ ЗМІН

У статті здійснено узагальнення підходів до розуміння інституційних змін. Проведено групування наявних підходів до розуміння поняття «ефективність» та визначено їх особливості щодо оцінювання регуляторної політики. Запропоновано сутність ефективності регуляторної політики в умовах інституційних змін.

Ключові слова: регуляторна політика, державне регулювання, інституціоналізм, інститути, інституційне середовище, інституційні зміни, інституційні пастки.

Постановка проблеми. Забезпечення сталого розвитку економіки, підвищення рівня конкурентоспроможності продукції та безпеки споживання в країні можливе лише за умови впровадження дієвої регуляторної політики, головним критерієм оцінки якої варто визнати її ефективність. Саме цей критерій відображає як міру досягнення поставлених цілей, так і співвідношення досягнутих результатів до понесених витрат, що дає змогу визначати доцільність запроваджених актів поряд із заявленими цілями. Крім того, ефективність регуляторної політики є дієвим інструментом для прийняття управлінських рішень у сфері державного управління у цілому. Враховуючи високу ступінь динаміки вітчизняного економічного простору та політичну нестабільність, сучасне інституційне середовище стає все більш мінливим, що вимагає визначення ефективності регуляторної політики з урахуванням інституційних змін.