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ВИМОГИ щодо змісту та оформлення статей до науково-виробничого журналу «ЧАСОПИС ЕКОНОМІЧНИХ РЕФОРМ»



CONCEPTUAL BACKGROUND OF STUDYING BALANCENESS OF ECONOMIC EFFICIENCY AND SOCIAL EQUITY

The relevancy of revising theoretical and methodological principles of the formation and development of the economic system based on ensuring balance of economic efficiency and social equity has been grounded. The features of building conceptual solution of the problem based on a multidisciplinary approach have been defined. It has been proved that the problem of grounding equity criteria requires more attention and discussion of the scientific community. The emphasis has been made on the fact that philosophy of science does not have constructive recommendations for the solution of not only future, but also current problems of the humanities. The expediency of using the phenomenological variant of constructing a paradigm of balancing economic efficiency and social equity has been justified. The nature and content of methodological construct of the future paradigm have been clarified.

Keywords: economic theory, development, economic efficiency, social equity, interdisciplinary approach, criteria balance, phenomenological scheme of the concept.

The formulation of the problem. Modern economic theory feels the scarcity of its ability to solve current problems on the basis of traditional paradigms. Their professional use still provides the effectiveness of studying individual separate critical situations, but fails to provide their aggregate picture due to extremely complicated qualitative nature of the practice. Such state has currently the problem of ensuring balanceness of economic efficiency and social equity, being actively discussed, but devoid of systematic methodological and methodical support. The analysis of the available publications on this subject showed that the recommendations presented in their majority, are not convincing and hardly suitable for their practical use. Firstly, they are very often based on the analysis of ideas of a small list of previous studies. Secondly, the authors (especially in these studies) pay much attention to describing the history of problem formation and development [1 - 4 et al.], however no constructive practical technologies for its solution are currently available.

There are sources the titles of which imply the presence of interesting ideas in them. However, they are often not available for studying and are presented rather for the purpose of advertising as know-how than for introducing colleagues and organizing a productive discussion in the scientific world. When writing this article, we have used a large amount of available literature, allowing to consider the authors' vision of the ways of problem solution. From these sources we can mark, for example, logically and convincingly expounded evolution of the development of this area with proposals for further research content in the work of I. Popova [5]. Integrated research on the subject is presented in the publications of such authors as M. Vakhtina [6], I. Afinogenova [7], O. Makarova [8], Yakunina [9]. When working on

this article, we have also taken into account the fact that there are known cases in the science when it makes sense to return to the undeservedly forgotten results of previous researches. To generate ideas on the performance of further studying the balanceness of efficiency and equity, we used separate findings on the problem analysis, reflecting its structural solutions in the coordinates of its time, presented in the works of famous scientists - classical economics (eg, D. Petrosian [10] R. Ryvkina [11], T. Zaslavskaja [12]).

Studying the problems of ensuring balanceness of economic efficiency and social equity is currently intensified. Over the last years the attention paid to them in Ukraine has increased, that is reflected in interesting and informative publications of domestic scientists [8, 13-15].

Both economic balanceness and social equity already have the history of research study and remain within scientists' eyesight, however many problems of their balancing still require conceptual analysis and development of mechanisms for practical solution. The critical field of theoretical and practical problems on the subject has not been clearly determined. Some authors insist on the absence of systemic theoretical background for their solution [10], while others believe that such background is already available, that only practical advice and programs of their implementation are required [1].

If we compare the closeness of scientists' views on the two problem components (efficiency or equity), the structure and function of social equity are more uncertain as compared to the similar characteristics of economic efficiency. One can agree with A. Kovnerov who in the article "Dialectics of "Truth-Veritas" explains the complexity of studying and regulating the equity by the growth of life dynamism. Particularly the rates of



its changes impede timely specifying the reasons for the occurrence of unique critical situations: "Social concept of equity can be attributed to those philosophical problems, the solution of which will undertake each new generation of philosophers, realizing the historic nature of the obtained solutions" [16, p. 58].

Especially conflicting views scientists have on equity qualitative and quantitative assessment criteria. Some of them are oriented exclusively on economic performance [11, 14, et al.], while others declare the need to switching to its human-dimension indicators [6], providing at that neither justification list, nor justification content. Sometimes they provide them only at the macro level (through indicators of quality and standards of life), although the subject area has a hierarchical structure, which is based on the equity of each separate individual.

Ideas that unite scientists studying the coordination of economic efficiency and social equity are, firstly, the awareness of the need to enrich the economic model of a human. The problem, having been long overdue and solved is connected with reflecting in it not only economic but also social interests, desire to develop skills, demonstrate the unique personal abilities in work, perceive and solve critical situations as motivators of labor behavior [3, 5, 14, 19, et al.] . Another unifying moment in the construction of methodical support is the focus on the creation and use of multidisciplinary technologies, both in the study of the current problem of economics and in the development of technology for conversing practical situations [5, 13, 14, 19, et al.].

Developments of psychology, sociology and other of human-dimension disciplines have long been actively penetrating into the subject area of traditional economics, however being non-systematically used. That is, there is still no logical system paradigm for studying multiple-parameter interdisciplinary problem of balancing efficiency and equity aimed at restoration of effective functioning and sustainable development of the economic system.

The purpose of the article is the definition of conceptual background of developing research paradigm of studying balanceness of economic efficiency and social equity, project problems of its formation and ensuring the effectiveness of their solutions.

As methodical support for the achievement of article purpose we have used dialectic, system-synergy and multidiscipline approaches, analysis and synthesis of abstract theorems of economics, philosophy, sociology, social and economic psychology, organizational behavior, theo-

ry of management and other sciences related to the study of human activity.

Literature review. The first condition for ensuring the reliability of developing preparadigmatic research of efficiency and equity balanceness reserves is the focus on the use of theoretical and methodological foundations, technologies, tools of a complex of disciplines related to the study of human activity [5, 14, 18, et al.]. Scientific practice shows that this approach allows to solve new problems, creates the basis for explanation and prediction of complex by their nature phenomena, opens the possibility of building new technologies, methods and approaches. To overcome the problems of ensuring the effectiveness of a multidisciplinary approach in research studies, it is advisable to use the recommendations presented in the work of O. Palagin and O. Kurgaev [20].

The effectiveness of the discussions and practical use of interdisciplinary approach depends on the interpretation of this concept. A. Kolot believes that interdisciplinarity can be taken in the following cases:

- mutual penetration, cross-fertilization of approaches and methods of various sciences (disciplines);
- possibility to identify, recognize and accept the things having been hidden in the depths of a particular science, provided the use of methods and tools of other sciences;
- expansion of interdisciplinary connections as an antidote to excessive narrowing of the subject, area of scientific research, problematics of economic disciplines;
- attracting methods, tools, research results by interrelated sciences, the use of their theoretical frameworks, models, categories, concepts;
- desire to overcome the expansion of economic materialism to most sectors of economic science;
- moving socio-economic, managerial methods, tools beyond the study of economics proper on one side, and the interaction of economists with other scientists, engagement of their methodological and practical tools on the other side;
- not only engagement of methods and tools of various sciences, but their integration in the sense of construction of interdisciplinary objects, items, the work with which allows to obtain new scientific knowledge;
- scientific and pedagogical innovation, giving birth to the ability to see, recognize, take something being unavailable within a single science with its specific narrowly focused object, subject and methods of research.





That is, interdisciplinarity shall be broadly defined as the synergy of different sciences, providing the development of integration processes, the increasing interaction of methods and tools for receiving new knowledge [15, p. 20].

As for horizontal interdisciplinary relationships of economic theory and practice, they have long been reflected, for example, in such disciplines as economic psychology, economic sociology, socioeconomics [21 - 23]. The last mentioned scientific direction is actually actively promoted and developed in the context of representing tools for ensuring consistency of economic efficiency and social equity.

A. Etzioni, a founder of the new science thus determines its characteristics as follows: "Socio-economics emphasizes the role of social equity along with economic efficiency". Its supporters consider it necessary to take into account first of all the impact of psychological "income" and emotional security on workforce productivity when performing economic studies. Secondly, the importance of preserving the institutional integrity (and all the parties involved) compared to the imperialist corporate policy shall be taken into account. Thirdly, the importance of moral foundations both for family and community, and for the market itself, which is ultimately based on trust and integrity shall be considered [40].

A famous sociologist T. Zaslavskaja notes the following important principles of socioeconomics, promoting harmonization of economic and sociological approach in this discipline:

1. System approach as the basis of methodological positions: any socio-economic object is represented as an integrated open system, economic and social aspects of functioning (development) are closely related to each other, but at the same time endowed with own logic of change (development) in the space and time.

2. Consideration of the bilateral nature of the relationship between economic and social aspects of life, mutual interaction of their characteristics.

3. Use of economic evaluations of the studied social processes and phenomena, their interrelations.

4. Recognition of social character of economic activity, taking moral and cultural, socio-structural and other aspects of individual choice of economic behavior variant into account.

5. Selection of interdisciplinarity of scientific positions when studying real problems does not limit the economic approach, but recognizes it as just optional.

6. Adjustment for the use of theoretical constructs results when developing practical recommendations [23, p. 146].

Socioeconomics states: social equity shall be a criterion for assessing decisions made by government officials, business entities and civil societies. If in the process of building a socially oriented economy the contradictions in relation to equity of business, power and society remain unsolved, there will be no success in its reforms.

Traditional economic theory pays little attention to the interaction of economic objects, subjects and institutions. This important addition to the ideas of socioeconomics is reflected in publications focused on the search of tools for arranging the relationship between economic efficiency and social equity [10]. In this respect, it shall be noted, for example, the work of M. Vakhtina [6]. The author, based on a large statistical material, gives the grounds for the need in the establishment of institutional mechanisms for ensuring social equity in the modern market system. "Investigation of the institutional foundations of fair market economy will help to provide the necessary theoretical basis for the development and implementation of specific measures aimed at maintaining equality of economic rights, fair competition, overcoming excessive income inequality and poverty", believes M. Vakhtina [6, p. 5]. Considerable assistance in the creation of fair state institutional mechanisms of building a just society and the economy in Ukraine have civil organizations with experience in reconciling their private interests with national ones [7, p. 59; 24, p. 121; 25, p. 5].

Vertical multidisciplinary in the study of reserves of constructive balanceness of economic efficiency and social equity is focused on the association of ideas, methods, mechanisms of perception and transformation of actuality of sciences, being at different levels of abstraction and generalization. Economic theory and philosophy can be referred to such sciences in relation to the subject matter of this article. However, focusing on these disciplines, it is necessary to take into account the fact that they both have their own problems.

Thus, economic theory is currently looking for the ways to overcome the limitations of mechanical models of economic phenomena, oriented at process linearity. This limitation is already recognized by the scientific community, however a convincing alternative model of nonlinear mechanisms of economic processes is still being developed. The problems of its construction are associated first of all with the need to use technologies, tools of disciplines related to the humanization of human life, which are hardly mathe-

mized by their nature. Secondly, humanitarian perception of object in its historical development can never be final and the only reasonable. The dynamism of the economy and society has such consequences that both products of activities and human potential are evaluated by new generations from scratch, reinterpreted, filled with new value and meaning.

The most part of work on the possibilities of solving this problem is performed by academician O. Bogomolov. A regular seminar on "Non-economic facets of economics: the unknown mutual interaction" and publications of monographs presenting his findings were organized on his initiative [26]. Ideas of problem brainstorming are supported by many scientists [19; 27 - 29], including Ukrainian ones [14].

The arguments and reasons for inconsistency of the modern economic theory are presented in the works of Yu. Shevtsov [30; 31]. He categorically denies the opinion of Nobel laureate R. Lucas, who directly states that he pursues in his research the goal of creating a mechanical artificial world populated by interacting with each other robots, being the subject matter of economics. According to R. Lucas, the economic theory "is something that "can be put on a computer and run". Yu. Shevtsov expresses his opinion on the ways of economic science development as follows: "Moral structuring of the economy – here is the way of its progressive transformation, according to which the efficiency of production activity finds its expression not in the value of abstract parameters of financial sufficiency of various business entities – income, profitability GDP and others, but acquires its spiritual dimension" [30, p. 56]. At that the author agrees with his colleagues having previously published a similar opinion [32; 33].

Revolutionary changes in the economic life and economics require radical and global changes in the process and content of the system of scientific knowledge, transition to new theoretical and methodological bases, to new fundamental concepts and methods, to the scientific picture of the world. Reliability weakness of modern economic science resembles the situation existing at the beginning of the 20th century in physics. Then the revolutionary changes in the science were so fundamental that forced the scientists to review its philosophical foundations and due to that revision its status was restored.

That is why when studying modern sophisticated economic problems, it is advisable to reconsider the relationship of economics and philosophy. That is, an anticipated radical change of economic theory concept requires the appropriate

philosophical foundation. Its role is convincingly argued by P. Alekssev and A. Panin who believe that philosophy stands as one of the essential factors of scientific knowledge integration, ensuring the effectiveness of constructing a new economic theory based on combining knowledge of other sciences [34, p. 27].

Their opinion is supported by other philosophers. Thus, V. Kanke writes on this subject the following: "Every scientific discipline is a systematic formation with at least three its parts being distinctly distinguished: basic science as such, its philosophy and methodology ... Knowledge of the basic part of scientific discipline does not eliminate the need to make its form clear to others and provide clear formulation of its basis, that requires corresponding methods becoming meaningful in philosophy of this science. Namely such philosophy aims to provide the science with the highest form of conceptual soundness" [35, p. 3].

V. Kokhanovskii notes: "Researchers mark off a specific heuristic function of philosophy in relation to scientific knowledge, which is most noticeable when nominating fundamentally new theories and ratios. Namely philosophical studies form science self-consciousness, its reflexivity, develop inherent to it understanding of its capabilities and prospects, specify directions of its further development" [36, p. 37]. However, when dealing with the above recommendations, it should be remembered that the philosophers themselves warn: "Studying the most general laws of being and knowledge, philosophy acts as a marginal, the most common method of scientific research. This method, however, cannot replace the specific methods of individual sciences, it is not a universal key that opens all the mysteries of the universe, it a priori defines neither specific results of particular sciences, nor their peculiar methods" [36, p. 328].

Unification of concepts of philosophy and concrete science is quite a complicated process. P. Alekssev and A. Panin pay attention to the content of this complexity, "The attention shall be paid to the following moment: the impact of philosophy on the construction of specific theories is not integral but fragmentary, local. Only separate ideas, concepts (or their groups), separate philosophical principles have "penetrating" force... Specific scientific knowledge appears to be selective not only in relation to various philosophical concepts, but also in relation to different categories and principles within one philosophical system of categories. ... If it is true that philosophical ideas and principles perform selective function in respect of specific scientific knowledge (its ideas, principles, hypotheses, concepts, theories), it is equally true





that the forming specific scientific hypothesis or theory (directly or indirectly) selects philosophical ideas, principles, concepts). There is a kind of test of philosophical principles and general categories in the practice of perception. Such competition and such a test can stand far not all kinds of philosophical principles ... [34].

Using philosophy when developing the ways of resolving contradictions of particular science, it shall be mentioned that it itself has contradictions and significant reserves of its development. The main aspects of the development are related to a person's search of his position in the world, determination of reason for existence, the fate of our civilization. However, an agreed solution of this mission of its science by philosophers has not been yet presented. They have no unity even in the representation of the structure of their science. Some of them mark in it ontology, epistemology, logic, dialectics, ethics, aesthetics, as well as anthropology, social philosophy, history of philosophy, philosophy of religion, methodology, philosophy of science, philosophy of technics and others [36, p. 30]. Others mark ontology, gnoseology, social philosophy, philosophical anthropology [37, p. 5]. Enough detailed classification of philosophy sections is explicated in the work of O. Kirichok [38, p. 13]. The author marked off such a section as phenomenology, almost absent in the traditional lists of classic textbooks on philosophy. Information space is full of publications on phenomenology. However, the presentation of the material is focused exclusively on philosophers, and is little available for economists due to the terminology. In terms of solving problems associated with studying reserves of efficiency and equity balanceness, namely this direction of philosophy is of principal interest. Phenomenology assumes that in situations where the science has no ready constructions (paradigms), a scientist can use his intuitive vision of the problem and try to normalize the available knowledge, skills and ability to formulate the content of the new paradigm. Confidence in decision making in this case is provided by systems thinking, intuition, talent, considerable competence in the subject area. The whole problem of the phenomenological system of phenomenon or process perception is that its not unique content prevents the author to freely share his knowledge with the scientific world, create a group of like-minded people, required by the new paradigm.

To solve this problem, it makes sense to use the provisions and recommendations of philosophy of science. In the corresponding literature its content is often represented by variants of such scientist as K. Popper, T. Kuhn, P. Feyerabend, I.

Lakatos, either of which has his own idea about the subject. K. Popper states that the science has no final decision; it is constantly developing from a shallower to a deeper problem. T. Kuhn believes that the science is developing unevenly, on a phased basis, from traditional technology through the revolution to the new technology. The scientific revolution according to Kuhn is a paradigm shift, the transition from one "normal science" to another one with the mandatory creation of a scientific school, working under technology of the new single paradigm. Feyerabend has more radical views on the revolutionary way of science development, actively protecting the "thesis of theories incommensurability" and believing that "everything is permissible" in the scientific search. The effectiveness of the orientation to the philosophy of P. Feyerabend depends on the ability of a scientist to protect the position of his ideas in scientific discussions. The basic unit of the philosophical model of science according to I. Lakatos is a "research program", consisting of a "hard core" and "protection belt". Hard core can be taken as the main integral structure of Kuhn's paradigm, while protection belt is an attempt to overcome paradigm limitations in specific situations. In general, the fact shall be accepted that the development of philosophy of science considerably decelerates in comparison with the development and accumulation of current science problems (apart from future ones) and those past achievements, being subject to methodological analysis.

Currently the development of economic science in Ukraine, related to the class of socio-humanitarian disciplines is implemented, controlled and qualified according to Kuhn's philosophy. This variant of science development involves three stages: pre-paradigmatic, paradigmatic and revolution stages. At the last stage the subject area escapes from usual paradigmatic coordinates of development laws and requires a global review of its ideas and construction of a new paradigm. If we apply this thesis to the subject of the present article, its research is currently on pre-paradigmatic phenomenological stage. Before proposing original ideas of the new paradigm, the content of this scientific construct shall be firstly clarified. Unfortunately, it has a great number of interpretations. T. Kuhn recognized this problem and at a certain stage of his scientific activity replaced the construct "paradigm" to construct "disciplinary matrix".

Analysis of variants of paradigm determination was performed by V. Kotenko in the article "The paradigm as the methodology of scientific activity." The author came to the conclusion that the main cause of problem of using paradigms as

methodology of scientific reality is an ambiguous understanding of the nature of science and scientific studies. The article gives examples of ambiguities paradigm interpretation. Thus, Yu. Yakovets understands under a paradigm a prevailing system of ideas and theories, providing the certain vision of the world. A well-known expert in the methodology of science, V. Stepin, analyzing this concept, states that paradigm is a type of rationality, intrascientific strategy, science foundation (ideals and norms, worldview, philosophical basics). He believes that the paradigm can be defined as a strictly scientific theory, embodied “in a system of concepts that express the essential features of reality, as well as generally recognized scientific achievements, providing the scientific community with a model of challenging problems and their solutions within the framework of a certain historical period”. V. Kotenko makes his conclusion about the functional role of the paradigm: it serves as a methodological basis for scientific activity, where a new type of ideals and norms of scientific research, standards and methods of explanation and description, norms of knowledge conclusiveness and reasonableness, ideals of organization of knowledge and scientific studies are formed [39, p.22-25].

At the stage of paradigm shift several scientific schools are simultaneously developed, often having opposing views. This tendency shall not be perceived as a problem, since it allows to consider and use the accumulated rich potential of economic science. For effective uniting original schools and technologies of various disciplines, it is necessary to represent their paradigms in similar coordinates. The search of generalization of paradigm structural components in classical publications was unsuccessful. However, the attempts, allowing building a conceptual framework of a new paradigm shall be continued. To solve this problem, we offer the following components of the preliminary construct of studies devoted to balanceness of economic efficiency and social equity:

1. The main idea. It shall reflect the essential change of the content of the research subject, allowing to focus attention on its critical points.

2. Conceptually-categorical support. Today, a new paradigm shall be created at the intersection of scientific disciplines. Different scientific schools often coexist in disciplines. This is especially true for the humanities. Therefore, without clarifying the meaning of the terms used in the paradigm, the scientific community will not be able to exchange ideas.

3. Hypotheses. Pre-formulated hypotheses, their number and content will create a sufficient

and necessary number of organically united in a system ideas necessary for the protection of authorship and recognition of academic qualification. Each hypothesis shall be made in order to resolve conflicts between the requirements of practice and the limitation of available theoretical background of its solution.

4. Principles of study and principles of practice transformation. They greatly facilitate the work of followers. Their list can be voluminous, however in a particular situation a working combination of principles shall be created by synthesizing the principles of those sciences that form the theoretical field of the new paradigm.

5. Technologies of qualitative and quantitative diagnostics of the basic characteristics of the central notion, factors and conditions of its origin, preservation and development. It shall be taken into account that the complexity of mathematical models has to be necessary and sufficient for getting the result, considering time savings, allowing take close to optimal practical solution in real time.

6. Possible sources of information for search and argumentation of the conclusions and results. This is the most difficult component of the paradigm of balancing economic efficiency and equity. Only convincing advertising of usefulness of the research results will allow to win over those practitioners who will be offered a list of constructive solutions to their unique problems.

Conclusions and prospects for further research. Studying a multiple-parameter problem of balancing efficiency and equity with the objective of ensuring effective functioning and sustainable development of the economic system has no methodological support. Its development is possible on the basis of horizontal and vertical interdisciplinary approach. Equity is the most complex construct in the pair “efficiency-equity”. For its studying it is advisable to use recommendations of such a relatively young science as socioeconomics. This discipline has most practices for justifying the need for social equity as a criterion for assessing decisions made by government officials, business entities and civil societies. Vertical interdisciplinarity is ensured by the use of recommendations of economic theory and philosophy. Focusing on these disciplines, it is necessary to take into account non-economic facets of economics: Using the philosophy for developing the ways of resolving conflicts of a particular science, recommendations of phenomenology shall be taken into account. This field of philosophy assumes that in situations where the science has no ready constructions (paradigms), a scientist can use his intuitive vision of the problem and try to normalize the available knowledge, skills and ability to for-





mulate the content of the new paradigm. To solve the problem of studying balanceness of economic efficiency and social equity, paradigm construction can be oriented to the following system of its elements: the main idea; conceptual-categorical support; hypothesis; principles of research and transformation of balanceness; technologies of qualitative and quantitative diagnostics of the main characteristics of balanceness, factors and conditions of its origin, preservation and development; possible sources of information for the search and argumentation of the conclusions and results. Further continuation of studies on the subject of the article shall be focused on clarifying the content of the listed paradigm components. The authors are ready to accept observations and recommendations of colleagues in this process.

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Концептуальні передумови вивчення економічної збалансованості ефективності та соціальної справедливості

Обґрунтовано необхідність перегляду теоретико-методологічних засад формування і розвитку економічної системи держави на основі забезпечення балансу економічної ефективності і соціальної справедливості. Визначено особливості побудови концептуального забезпечення вирішення проблеми на основі міждисциплінарного підходу. Доведено, що проблема обґрунтування критеріїв справедливості вимагає більшої уваги і обговорення науковим співтовариством. Підкреслено, що філософія науки поки що не має конструктивних рекомендацій для вирішення не тільки майбутніх, а й поточних проблем гуманітарних наук. Обґрунтовано доцільність використання феноменологічного варіанту побудови парадигми балансування економічної ефективності і соціальної справедливості. Виконано уточнення сутності і змісту методологічного конструкту майбутньої парадигми.

Ключові слова: економічна теорія, розвиток, економічна ефективність, соціальна справедливість, міждисциплінарний підхід, баланс критеріїв, феноменологічна схема концепції.

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Концептуальные предпосылки изучения экономической сбалансированности эффективности и социальной справедливости

Обоснована необходимость пересмотра теоретико-методологических основ формирования и развития экономической системы государства на основе обеспечения баланса экономической эффективности и социальной справедливости. Определены особенности построения концептуального обеспечения решения проблемы на основе междисциплинарного подхода. Доказано, что проблема обоснования критериев справедливости требует большего внимания и обсуждения научным сообществом. Подчеркнуто, что философия науки пока не имеет конструктивных рекомендаций для решения не только будущих, но и текущих проблем гуманитарных наук. Обоснована целесообразность использования феноменологического варианта построения парадигмы балансировки экономической эффективности и социальной справедливости. Выполнено уточнение сущности и содержания методологического конструкта будущей парадигмы.

Ключевые слова: экономическая теория, развитие, экономическая эффективность, социальная справедливость, междисциплинарный подход, баланс критериев, феноменологическая схема концепции.

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