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SOCIĀLO ZINĀTŅU FAKULTĀTE  
HUMANITĀRO UN SOCIĀLO ZINĀTŅU INSTITŪTS

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*Givi Bedianashvili, Revaz Begiashvili* (Georgia)

## GLOBAL CHALLENGES FOR THE TAX SYSTEM DURING THE PANDEMIC AND THE RESPONSE OF THE GEORGIAN TAX ADMINISTRATION TO COVID-19

Covid-19 will change the lives of people globally, consequently governments around the world are implementing multi-faceted and multi-point plans to protect citizens, encourage and promote business and provide important services. Among these actions, the role of tax administrations is important which provides for easing the burden on taxpayers and facilitating businesses and individuals who face problems with cash flow and tax payments and other difficulties. The tax administrations of the world have developed issues to be considered in the implementation of anti-crisis measures of which it is important to highlight a few of them on the example of our country Georgia: Whether to take targeted actions that only apply to the taxpayers most affected by Covid-19. In this situation, tax administrations may consider how to establish precise criteria and requirements for obtaining evidence of a reduction in the tax burden. Duration of measures. On the one hand short-term measures may not be effective however longer-term measures may create problems in the future making it difficult for taxpayers to return to normal state. For example, incurred debts or deferred taxes can lead to serious cash problems later on. Possibility of fraud. Some measures may be particularly vulnerable to fraud. It may be necessary to introduce new risk measures depending on the measures taken. The pandemic process has made it even more apparent to world administrations that they need to develop a number of necessities. Against the background that the role of online commerce and services in the world economy has increased in recent years, especially during the pandemic period (it, probably, will continue to grow steadily) there is no alternative to switching online to more structures of government structures and tax administration. If it is technically possible to introduce any type of service online it should be implemented as a matter of priority. This will save more money in the budget, will significantly improve the quality of service and increase the volume of services provided. Due to the Georgian reality, significant shortcomings in the registration of taxpayers were identified, mainly in the form of self-employment. It is important to pay attention in this regard and to solve the problem of tax registration for the first possible mass of taxpayers. Next, the information about their income and paid taxes should be analyzed. This is not only important in order to accumulate more taxes in the budget but also to provide the state with full information on the business challenges in the country so that, if necessary, subsidies can be provided to the sector most vulnerable to the challenges. Most importantly, the interests of a bona fide taxpayer will be better protected and feelings of inequality

will be reduced. The paper presents the issues application in Georgia of good practices realized in the EU and other world countries, as well as the application of Georgia's own approaches.

**Key words:** pandemic (Covid-19), tax administration, tax relief, anti-crisis and post-pandemic measures.

## **Introduction**

Coronavirus (COVID-19) is a complex challenge and a major threat not only to world health but also to the global economy. The exponentially rising number of infected and widespread areal of the virus turned the virus that originated in Wuhan into a pandemic in just a few months at the end of 2019. The negative impact of COVID-19 on the global economy is now irreversible.

The Asian Development Bank study addresses three potential cases of the likely effects of a pandemic. The effect of a pandemic on the global economy will be different and will depend on how long it takes to defeat it. According to the Asian Development Bank, a \$77 billion (0.08 per cent of GDP) pandemic to \$347 billion (0.4 per cent of GDP) would hurt the world economy.

The circumstance triggered by Covid-19 has changed people's lives globally, which is why governments around the world are adopting multi-faceted and multi-point policies to protect citizens, facilitate and support businesses and provide essential services.

Among these acts, the role of tax administrations is significant, which makes it possible to ease the burden on taxpayers and to facilitate businesses and individuals who face difficulties with cash flow, tax payments and other difficulties.

In the context of the Georgian Government's anti-crisis strategy, a range of steps have been taken at several levels, including measures taken by the Georgian tax administration to assist taxpayers in the post-pandemic period. Which is evaluated by global organizations as an adequate and effective response to the challenges posed by the pandemic.

## **Methodology and method**

Effective operation of the tax system in a pandemic is of great importance for promoting the functioning of the economy and the business sector. A number results of researches on these problems were published over the past year (e.g., OECD 2020; Gaspar 2020; Gleckman 2020; Custers

et al. 2020; Steel & Phillips 2020; Suzuki 2020; Yiallourou 2020; Asquith 2020; Eurotax 2020; Papava 2020; Papava & Charaia 2020; Archvadze 2020, Bedianashvili & Begiashvili 2020). In defining specific ways of responding of the tax system in a pandemic economy, it is important to consider both general and modern theoretical approaches (Ananiashvili & Papava 2009; Ananiashvili & Papava 2013; Ananiashvili & Papava 2016; Gale & Samwick 2014; Barro & Furman 2017) As well as understanding the specifics of the relevant tax structure and economic systems in general in the context of specific countries (Bedianashvili et al 2019; Begiashvili 2020; Kopaleishvili & Chikviladze 2011; Chikviladze 2018; Silagadze & Zuniashvili 2016; Gale & Samwick 2014; Oparin & Paienko 2017; Chikviladze 2018). In This context for Georgia as well as any other country, when using specific tax instruments, we think it is advisable to use the benchmarking method (Bedianashvili 2017), which will allow us to share and master the good practices of the EU and other world countries.

### **Global Challenges of the Tax System**

Tax administrations are either using or intending to put in place various steps to support taxpayers or classes of taxpayers impacted by Covid-19. As far as individual taxpayers are concerned, these measures are designed to avoid difficulties and reduce the burden. The measures taken for legal entities and self-employed enterprises are designed to overcome cash flow problems and help solve problems such as mass layoffs, the inability to pay temporarily to suppliers and in the worst case, the closure or bankruptcy of a business.

The measures taken by the tax administrations of the world to address the issues exacerbated by the pandemic can be grouped as follows:

- Extra time to settle tax issues, including:
  - Extension of the declaration and payment deadlines;
  - Removal of fines and penalties;
  - Deferral of tax payments;
  - Quick access to long-term debt repayment plans and extended deadlines;
  - Suspension of the debt collection;
- Quick tax refunds for taxpayers;
- Temporary changes in auditing policies and fast ways to ensure tax sustainability;
- Improved tax services and communications initiatives.

However, it should be noted that at the stage of the implementation of the above steps, the tax administrations of the different countries have identified a number of issues to be addressed in the anti-crisis measures process, namely:

- The State should extend concessions equally to all taxpayers, only to specific individuals most affected by the pandemic, the concessions should be extended to specific business sectors or to small businesses only;
- Consequences which may arise from the State in the process of extending the concessions to the taxpayer;
- Duration of measures taken: The concessions period may not be adequate for certain taxpayers to maintain normal economic conditions, and yet longer-term intervention may create future problems and make it challenging for taxpayers to return to normal;
- The number of unscrupulous taxpayers is expected to increase. At a time when tax administrations are suspending tax arrears, this situation can be used to accumulate tax arrears and evade assets (property and money) from the enterprise, which will ultimately make it impossible to collect taxes in the future. This requires the introduction of new risk-taking measures;
- As social distancing is an important factor in managing the spread of the virus, tax administrations should provide all taxpayers with access to online services through a variety of channels.

Deadlines can be extended by weeks or months to allow more time for Covid-19 impacted individuals and businesses to file tax returns and related documentation, as well as to pay taxes. On request, this process can be automated or in a simple format.

This could be highly pertinent for taxpayers who need assistance from the intermediary or specialist personnel and the system to complete the return.

In addition to the proper calculation of the tax, the details provided for in the State tax return may be required for various purposes. In this case, the time limit for the payment of the tax should be deferred, not the declaration. In addition, tax return information can be used to better understand the economic impacts of Covid-19 in identifying industries that require additional assistance and to be able to track economic improvements.

The Covid-19 outburst had an unprecedented effect upon many people who were temporarily suspended or dismissed on unpaid leave. For many



companies particularly small businesses and self-employed individuals, the economic downturn has had dire consequences as stores have closed, the number of customers has been drastically reduced, contracts have been terminated, the supply chain has been shut down, and so on. At the same time, these businesses still have expenses such as rent, utility bills, wage costs, and so on. Hence the problem of money circulation has affected not only one, but several businesses linked with each other in the domino effect.

In this circumstance, tax administrators would be advised to assist taxpayers by setting a one-time payment requirement for a quarterly or six-month period. It is also conceivable that the State would temporarily cease to take steps to ensure the collection of tax arrears unless there is a rise in economic activity and as a consequence boost the solvency of companies. In addition, tax administrations may consider individual tax fines individually as part of tax incentives, and if they are related to Covid-19, it should be possible to waive them.

Taxpayers with tax arrears should be entitled to defer their debt for a longer period than is normal and under special (new) terms.

During the pandemic, a period of scarce cash resources, the prompt return of overpaid sums by tax administrators to taxpayers is of particular importance. At this point, some relaxation of the risk criteria may be considered, although the risks of fraud should also be considered.

As far as the tax audit is concerned, it requires more resources from both the tax administration and the taxpayer. Audit also entails the risk of disease transmission enough so on-site tax inspections can indeed be replaced by in-house inspections, and tax administration may generally focus on greater risk at this period. For example, fraud involving workers' funds and pension contributions.

In recent years, numerous tax administrations have extended their digital communication platforms, from digital communication to direct digital interaction, making the use of online chats, social media and mobile apps more active. This helps to minimize physical contact and to get a quicker response. Since Covid-19, governments have implemented special websites, media campaigns, hotlines and mobile app updates to deliver services to taxpayers more efficiently and flexibly. It is also essential to manage the waiting time for phone calls and to analyze FAQs (frequently asked questions).

The tax administrations may also consider how they can better communicate information about the measures they have taken to individuals who have difficulty accessing digital services.

## **Response of the Georgian Tax Administration to Covid-19**

The measures taken by the Georgian tax administration to help taxpayers since the onset of the pandemic are as follows.

### **Tax concessions:**

- Employees in the tourism sector, as well as those who had to stop working as a result of COVID-19, were given the opportunity to defer payment of property and income tax (income) until November 1st of this year;
- Fixed taxes for March, April and May were not charged for the following activities: beauty salon, manicure/pedicure (including nail extensions), solarium;
- Until October 1, 2020, the supply and / or import of the following goods intended for treatment / medical purposes shall be excluded from value added tax: protective shields, helmets, gloves, protective overalls, medical coats, sets of medical coats, caps and shoe covers, plastic goggles, contactless thermometers;
- Gambling business fee payers were given the opportunity to restart operations as required during the reporting period (quarterly) at the conclusion of the emergency, and the fee was charged in proportion to the amount of days actually operated instead of the full quarterly advance payment.

### **Simplified tax refunds:**

- The process of responding to the “registration risk” for the purposes of automatic VAT refund has been simplified;
- The refund procedure has been simplified in the “Taxpayers’ Claim” submission section.

### **Improved services under COVID-19:**

- Most of the services can be accessed via the Internet, thus minimizing the need to go directly to the service center;
- A video instruction has been developed – Revenue Service Remote Services (2020), which provides interested parties with detailed information on the electronic services offered by the Revenue Service;
- The project “Electronic Platform for Tax Disputes” has been implemented, which gives taxpayers the opportunity to participate in the dispute resolution session remotely, using electronic means of communication;

- Taxpayers have been made available to submit an additional 25 applications from the website;
- The number of daily incoming calls to the Revenue Service hotline has risen by almost 40%. As a result, the work schedule of the information center has been extended: before the pandemic it was set from 09:00 to 18:00 Monday to Friday, and in pandemic conditions the working time was set from 09:00 to 20:00, every day, including weekends;
- Situational manuals have been prepared to explain tax liabilities, and conveniently provide taxpayers with details on tax rates;
- Tax liabilities/sanctions reported on the temporary registration card of the taxpayer will be transferred to the main personal registration card only if the individual has not appealed the relevant decision of the tax/customs authority to the tax authority within 30 days of the cancelation of the state of emergency. As a result, the time limits for filing and reviewing a complaint have been suspended during this time, and taxpayers will no longer be required to settle their tax debts.

**Communication with taxpayers:**

- In order to facilitate the interaction with taxpayers for the use of the measures adopted, various channels of communication are provided which can be used to obtain the necessary information and services:
  - The Information Call Center (2 299 299) has switched to a new mode of service and 30 operators serve citizens every day, including on weekends, from 9:00 a.m. to 8:00 p.m.;
  - The number of consultants to send instant written explanations via e-mail (info@rs.ge) has increased by 61;
  - In order to provide access to electronic resources, video activation procedures for individuals have been simplified and legal entities are now being able to use the service as well;
  - Telephone contact and consultation were also possible on 24 telephone numbers in service centers and representative offices from 09.00 to 18.00;
- Information on changes to tax codes as a result of a pandemic is given in the form of a notification to the Registered User of Taxpayers page;
- Information about the measures taken is disseminated by the representatives of the Revenue Service through the media, including social media;

- Prior to the State of Emergency Announcement by the Government of Georgia, the Revenue Service called on taxpayers and other interested parties to make the most of the electronic resources available via the taxpayer's electronic platform, the official website of the Revenue Service and the hotline instead of visiting the service centers;
- For the efficient use of remote services, information on the official website of the Revenue Service is provided in the form of general electronic services of the Revenue Service, electronic tax services and customs services;
- Guides (brochures) on the most on-demand services have been prepared to make it easier for interested parties to use remote services;
- Banner COVID-19 has been posted on the Revenue Service website, where information on tax incentives due to the ongoing pandemic is updated regularly;
- The information is posted immediately on the official website of the Revenue Service ([www.rs.ge](http://www.rs.ge)) and on the Facebook page. In addition, a new category for questions related to COVID-19 opportunities has been introduced to the FAQ category at [www.rs.ge](http://www.rs.ge).

The Service Department held an online conference with members of the Accountants' Union to familiarize them with the Pandemic Support Network to which up to 15 online networking groups have been contacted.

### **Continuity of business processes**

#### **Decision on remote work and employee care**

- IT support has made it easier to switch staff to a partial remote mode of service;
- By order of the Head of the Department, it is restricted for the Revenue Service to arrange public activities with the participation of outsiders until the risk of a pandemic has been reduced;
- In order to maintain contact with workers, they can provide details on their health status, work schedule to the Human Resources Management and Development and Job Tracking Departments at [hr19@rs.ge](mailto:hr19@rs.ge) (new mail opened);
- Remotely working employees maintained full pay.

#### **Tax inspections – audit**

- The completed tax audits are temporarily reduced (and not entirely discontinued). Tax audit acts are drawn up as follows:

- (a) at the request of the taxpayer;
  - (b) if during the inspection, the individual did not report any additional tax liabilities (zero) and/or the amounts are reduced;
  - (c) on tax inspections initiated by law enforcement agencies;
  - (d) the results of the determination of the correctness of the recognition of the loss as a result of the inventory of SMPs with the person;
  - (e) the effects of the establishment (falsification) of fictitious operations;
- Ongoing on-site tax inspections are suspended.
- Combining other functions by the administration**
- Following the declaration of the state of emergency, mobile groups have been set up in the Tax Monitoring Department of the Revenue Service to monitor the implementation of the government decree on a daily basis, namely:
    - Identifying and taking action against certain entrepreneurial organizations, as provided for in the law, which had to suspend economic activities for an emergency period;
    - Checking out those entrepreneurial entities that are not forbidden from performing economic activities in a state of emergency as to whether they comply with the requirements and guidelines set out due to COVID-19, such as the equipment of service personnel with face masks and gloves; whether they maintain a social distance between customers (2 meters); whether they conduct disinfection and so on;
  - A group of Revenue Service personnel has been identified and trained to answer incoming questions on the Government Hotline-144 explicitly for emergency situations.

The Georgia Revenue Service has taken an important step towards the return of overpaid taxes, in particular: the automatic (without request) refund of the tax surplus generated by the VAT return for a specific month has been completely implemented since 17 November 2020. Under which, in the first month, more than 70 million GEL was returned to 9000 taxpayers.

It should also be noted that the Georgian Government continues to systematically deliver new incentives to the population and the business sector in the form of the Anti-Crisis Plan. For example, in the context of Phase IV of the anti-crisis plan submitted at the end of November 2020,

in particular for tax purposes, the most affected tourism sector in Georgia will benefit from the most favorable conditions, namely:

- Income Tax Concession – Persons with a salary of up to GEL 1,500 will be exempt from income tax of the amount of GEL 750 during the period of December-May 2021. Estimated number of beneficiaries: 33 thousand companies and 425 thousand employees. Budget – 260 million GEL;
- Property tax exemption for the tourism sector – The tourism sector (hotels, restaurants and similar properties) will be excluded from property tax in 2021. Budget – 45 million GEL;
- 4 months deferred income tax write-off – income tax deferred till December 1, 2020 will be written off for the tourism sector (hotels, restaurants and similar companies). Budget – 20 million GEL.

An article titled Response of the Georgian Revenue Service to Covid-19 has been published on the website of the Intra-European Organization of Tax Administrations (IOTA), which provides comprehensive details on the steps taken to respond practically completely to the challenges raised at the Forum on Tax Administration. It also notes that taxpayers support the initiatives implemented by the Revenue Service.

### **Conclusion**

The process of the pandemic has made the world's governments more aware of the need for accelerated development of a variety of needs. In view of the fact that the role of online commerce and services in the world economy has increased in recent years, particularly during the pandemic period (we presume it will continue to develop steadily), there is no alternative to moving online to more government structures and tax administration. If it is technically feasible to incorporate some form of online service, it should be introduced as a matter of priority. This would save more money in the budget, greatly boost the standard of service and increase the number of services offered.

Due to Georgian reality, major deficiencies in the registration of taxpayers have been identified, mainly in the form of self-employed employees. It is important to pay attention to this and to solve the problem of tax registration for the largest possible mass of taxpayers in the first stage. Next, evaluate the details on their income and taxes paid. This is critical not only in order to accumulate more taxes in the budget, but also to provide the State with full information on the country's business challenges,

so that if necessary, subsidies can be given to the sector most vulnerable to challenges. Most importantly, the rights of a bona fide taxpayer would be better protected and feelings of inequality minimized.

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**Глобальные вызовы налоговой системы и  
ответ налоговой администрации Грузии на COVID-19**

**Резюме**

COVID-19 изменит жизнь людей во всем мире, поэтому правительства по всему миру реализуют комплексные и многосторонние планы по защите граждан, поощрению и поддержке предпринимательства и предоставлению основных услуг. Среди этих видов деятельности важна роль налоговых администраций, которые облегчают нагрузку на налогоплательщиков и облегчают трудности, с которыми имеют дело предприятия и физические лица, сталкивающиеся с проблемами движения денежных средств, налогов и другими трудностями. Мировые налоговые администрации разработали вопросы, которые необходимо учитывать при реализации антикризисных мер, и важно выделить некоторые из них на примере нашей страны, Грузии: целевые действия ограничены налогоплательщиками, наиболее пострадавшими от COVID-19. В этой ситуации налоговые администрации могут подумать, как установить точные критерии и требования для получения доказательств снижения налоговой нагрузки. Продолжительность мероприятий. С одной стороны, краткосрочные меры могут быть неэффективными, но долгосрочные меры могут создать проблемы в будущем, затрудняя возвращение налогоплательщиков к нормальной жизни. Например, возникшие долги или отложенные налоги могут впоследствии вызвать серьезные денежные проблемы. Возможность мошенничества. Некоторые меры могут быть особенно уязвимы для мошенничества. В зависимости от принятых мер может потребоваться введение новых мер риска. Процесс пандемии дал понять глобальным администрациям, что им необходимо удовлетворить ряд потребностей. Учитывая растущую роль онлайн-торговли и услуг в мировой экономике в последние годы, особенно во время пандемии (которая, вероятно, будет продолжать неуклонно расти), у ряда государственных структур и налоговых администраций нет альтернативы переходу в онлайн. Если технически возможно реализовать какие-либо услуги онлайн, это должно быть сделано в приоритетном порядке. Это позволит сэкономить больше денег в бюджете, значительно улучшит качество услуг и увеличит объем предоставляемых услуг. В связи с реальностью в Грузии были выявлены значительные недостатки в регистрации налогоплательщиков, в основном в форме самозанятости. В этом контексте важно обратить внимание и решить проблему постановки на налоговый учет для первой возможной массы налогоплательщиков. Затем следует проанализировать информацию об их доходах и уплаченных налогах. Важно не только накопить больше налогов в бюджет, но и предоставить государству полную информацию о проблемах бизнеса в стране, чтобы при необходимости можно было предоставить субсидии наиболее уязвимым слоям населения. Самое главное — интересы добросовестного налогоплательщика

будут лучше защищены, а чувство неравенства уменьшится. В статье исследуются возможности применения в Грузии передовой практики ЕС и других стран мира, а также использование самого грузинского подхода.

**Ключевые слова:** пандемия (COVID-19), налоговое администрирование, налоговые льготы, антикризисные и постпандемические меры.

*Valery Nikiforov, Marina Likhushina* (Latvia)

## METHODOLOGICAL AND TECHNICAL SUPPORT OF DISTANT LEARNING DURING PANDEMIC PERIOD

The purpose of the article is to describe the problems of methodological and technical support of remote learning during the pandemic. The empirical basis for identifying this problem was a questionnaire survey of students of the Latvian, Russian and English streams of the Baltic international Academy, conducted in April-May 2020. The survey showed that: 1) 77.0% of students consider it possible and acceptable to study independently using distance learning technologies; 2) previous experience in using computer technologies helped the majority of students (68.66 %) to adapt to the transition to fully remote learning; 3) among the various forms of presentation of educational information, 91.66% of classes used video and audio presentations; 4) 88.0% of students did not experience problems with feedback from teachers; 5) students rated their satisfaction with the organization of fully remote learning at 3.62 points on a five-point scale. The novelty of the publication presented by the object of the research – the process of distance learning during the period of pneumonia.

**Key words:** remote training, questionnaire survey, problems of methodological and technical support.

*The pandemic has accelerated the irreversible process of introduction of computer technologies into education.*

### Relevance of the problem

COVID-19 has radically changed the situation in all spheres of human activity in almost all the countries in the world. A number of new problems have arisen: the problem of the formation of the institutional and legal environment for organizing remote work (Бочков 2020); problems of organizing remote work (Данцкер 2020); the attitude of employers and employees to remote work (Михеенкова 2020; Никифоров 2020) and others.

Traditional classroom (contact, offline) classes have given place to remote (contactless, online) forms of education. The emergency transition to distance learning gave rise to a number of interrelated problems. With regard to methodological and technical support, the pandemic has actualized

the following problems: 1) selection of optimal platforms for distance learning; 2) hardware and technical support of distance learning; providing access to information infrastructure; 3) different degrees of proficiency in computer technologies for both students and lecturers; 4) improving the skills of independent work among students; 5) providing effective feedback during education process; 6) counteraction to the decline in the quality of education at the initial stage of the transition to distance learning, etc.

Baltic International Academy (BIA) has a great experience in the use of computer technologies in teaching as an addition to traditional face-to-face teaching. However, the legislative introduction of distance learning in March 2020 due to the pandemic required the use of computer technologies as the main ones. Therefore, it became necessary to evaluate the current state of education using computer at BIA to develop a program for its further development. The assessment of the effectiveness of the educational process takes into account the opinions of the students. Therefore, a questionnaire-based survey was conducted among BIA students studying in Russian, Latvian and English. The questionnaire-based survey was conducted on April 1–7 and May 10–15, 2020. 192 respondents participated in the survey.

### **Distance learning quality assessment questionnaire**

During the emergency in our country, we have been working using only distance learning for more than a month. Your opinion on what needs to be improved is important for us to improve the quality of distance learning in the future. Please answer on the following questions.

1. What platform for distance learning was mainly used by lecturers for distance lectures – Moodle, Skype, ZOOM, other...?
2. Was the interface user friendly?
3. Was it easy to find the information you were looking for?
4. Have the lecturers used various forms of presenting information (video, audio, presentations, etc...)?
5. Were all the scheduled lectures conducted remotely exactly on time and in full scope (if not, please provide specific examples)?
6. Was it possible to get feedback from lecturers? Did the teachers consult, answer on problematic questions?
7. Did the lecturers manage to present the material in a clear and accessible way?

8. Were the tasks for independent work given to you? Were they checked and evaluated on time?
9. Is it possible and appropriate for you to study on your own using distance learning technologies?
10. Are you generally satisfied with the organization of training through distance learning technologies?
11. Your recommendations for improving the distance learning process.

### Answers on questions

1. What platform for distance learning was mainly used by lecturers for distance lectures – Moodle, Skype, ZOOM, other...?

RUS	LV	ENG
Moodle – 72	Moodle – 38	Moodle – 18
Skype – 10	Google Classroom – 1	Skype – 5
Zoom – 4	Zoom – 2	Zoom – 2
Google Classroom – 1	Skype – 3	
Facebook – 3	Whatsapp – 6	
Whatsapp – 4	Webex – 6	
E-mail – 3	Hangout – 4	
	E-mail – 9	
	Does not use any – 1	

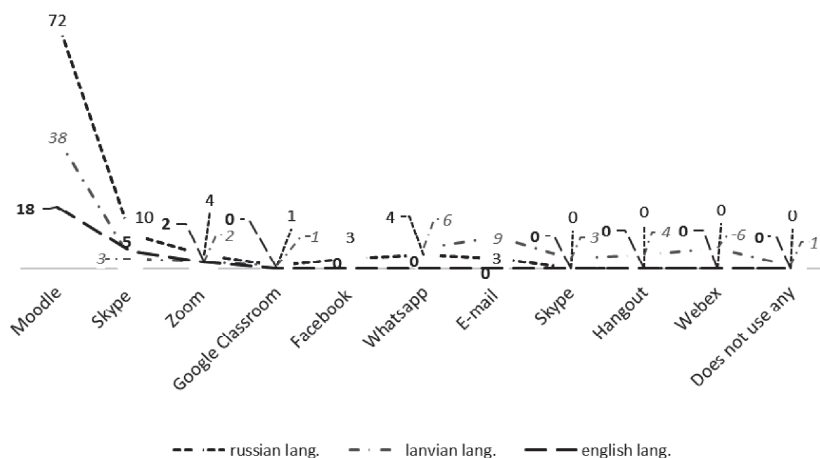


Figure 1. Results of choosing a platform for distant education

Source: Own study.

According to the questionnaire-based survey results, the majority of students used the Moodle system. The advantages of this system are that it allows you to keep track of student attendance, gives the opportunity to student-teacher dialogue online, as well as allows to record lectures (including all used presentations and other teaching materials). Video broadcasts are placed in a special folder of the system and students can watch them at any time.

## 2. Was the interface user friendly?

RUS	LV	ENG
4,1	3,9	3,4

Average – 3,8

All answers here and below were rated on a five-point scale

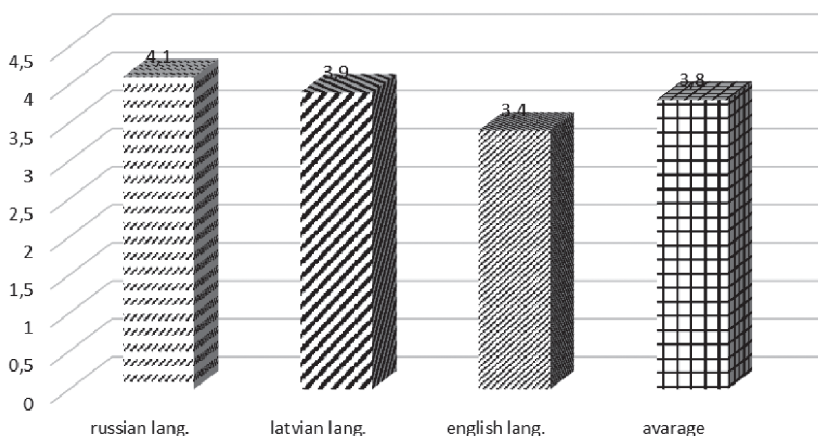


Figure 2. Satisfaction with the chosen interface

Source: *Own study.*

## 3. Was it easy to find the information you were looking for?

RUS	LV	ENG
Yes – 77,0%	Yes – 68,0%	Yes – 61,0%
No – 23,0%	No – 32,0%	No – 39,0%

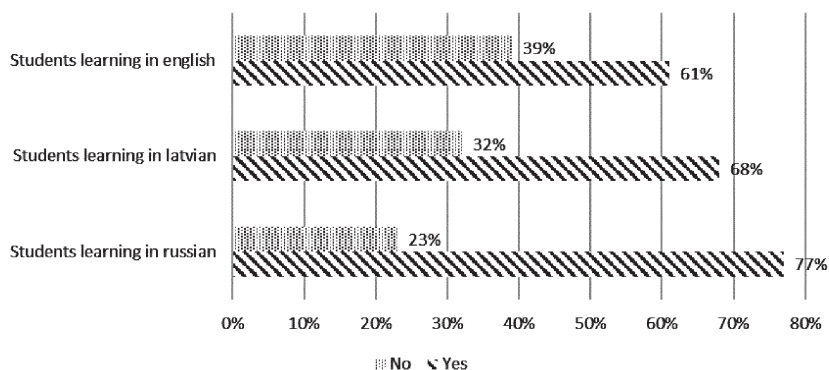


Figure 3. Satisfaction with finding necessary information

Source: Own study.

The largest number of negative answers about the convenience of finding the necessary information was received from English-speaking students. This is due to the fact that at the beginning of distance learning, students who for the first time started studying at BIA were disoriented among the large flow of information. At the moment, the situation has improved – English-speaking students are provided with consultations on technical issues, and the volume of English-language information on the BIA home page has grown significantly.

Another important point is that almost all students who are citizens of the Republic of Latvia (regardless of the language of communication) have previously used a distance learning system like Moodle. For bachelors, these were electronic journals at schools – E-klase or Mycoob, for masters – similar systems at other universities – for example, E-studijas at the University of Latvia.

#### 4. Have the lecturers used various forms of presenting information (video, audio, presentations, etc...)?

RUS	LV	ENG
Video, audio, presentations – 95,0%. Other answers: – Correspondence, – Only text materials for lectures, – Differently, – Looking for the information for tasks by themselves.	Video, audio, presentations – 90,0%. Other answers: – Poor quality of education, Latvian-speaking students have to listen to the lectures in Russian.	Video, audio, presentations – 90,0%.

Most of the lecturers used video, audio and presentation as the most convenient way of presenting information.

**5. Were all the scheduled lessons conducted remotely exactly on time and in full scope (if not, please provide specific examples)?**

RUS	LV	ENG
Yes – 69,0%	Yes – 84,0%	Yes – 56,0%
No – 31,0%	No – 16%	No – 44,0%

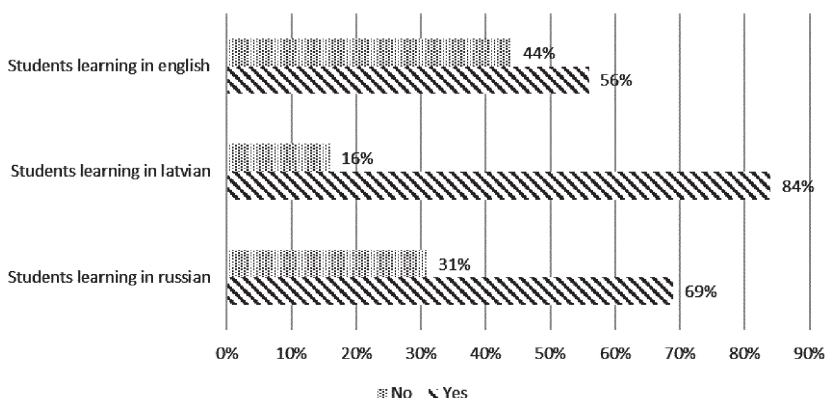


Figure 4. Evaluation of the fulfillment of the planned dates for conducting online classes

Source: Own study.

As mentioned above, not all English-speaking students were able to start their studies on time and understand the e-learning system that was new to them.

*Other answers*

*Answers of Russian-speaking respondents (translated):*

- No, some teachers do not want to give lectures if one lecture left or there is a text material on the e-mail.
- For some subjects, it is impossible to conduct lectures in full scope, therefore, tasks are just given to complete.
- Yes, learning went back to normal after about a week.
- There is no schedule as such!
- Difficulty in finding courses.



- One subject is completely missing.
- No “guided tours” and “hotel practice” lectures.
- There were several delays, but the lesson itself was conducted in full scope.

*Answers of Latvian-speaking respondents (translated):*

- I cannot say that the lectures are conducted as they should. Various materials are available, which teachers give us through e-mail, Facebook and WhatsApp groups.
- No, “Krāsu teorija III” started later.
- There are problems with sound quality.
- No, often lecture notes appear 1 or 2 weeks after their recording, although in fact they should appear immediately after the lecture.
- No. Lecture “Tūrisma darbības organizēšana un vadīšana” was not held.
- Postponing class to a later time takes place, it is difficult to find answers, it is difficult to find a credit work, you need to look through unnecessary subjects to find the information you need.

*Answers from English-speaking respondents:*

- No, there were no lectures for a month at all, but after distance learning started, lectures are given every day, even when it was not planned. As a result, the lecture times began to match.
6. Was it possible to get feedback from lecturers? Did the lecturers consult, answer on problematic questions?

RUS	LV	ENG
Yes – 93,0%	Yes – 81,0%	Yes – 90,0%
No – 7,0%	No – 19,0%	No – 10,0%

A positive point is that the majority of students (on average by flows – 88.0%) did not experience problems with feedback from teachers.

*Other answers*

*Answers of Russian-speaking respondents (translated):*

- Not all teachers answer the questions, some of them cannot be called for a dialogue at all.
- On some issues it is inconvenient to consult, but the teachers do not refuse to give written advice.

***Answers of Latvian-speaking respondents (translated):***

- Sometimes it is difficult to contact Professor V. Kachan.
  - No feedback, no confirmation of receipt of an e-mail.
7. Did the lecturers manage to present the material in a clear and accessible way?

RUS	LV	ENG
Yes – 92,0%	Yes – 90,0%	Yes – 84,0%
No – 8,0%	No – 10,0%	No – 16,0%

When answering this question, a large number of positive answers were also received, which indicates that the majority of students positively assess the ability of teachers to present material in an accessible way (on average, by flows – 89.0%).

8. Were the tasks for independent work given to you? Were they checked and evaluated on time?

RUS	LV	ENG
Yes – 89,0%	Yes – 91,0%	Yes – 92,0%
No – 11,0%	No – 9,0%	No – 8,0%

Based on the answers to this question, we can also conclude that the student-teacher feedback is well established, independent work with students is carried out at the proper level, homework was asked and checked.

9. Is it possible and appropriate for you to study on your own using distance learning technologies?

RUS	LV	ENG
Yes – 72,0%	Yes – 87,0%	Yes – 72,0%
No – 28,0%	No – 13,0%	No – 28,0%

For Russian-speaking and English-speaking respondents, online learning is less acceptable – many students need personal contact and supervision from teachers. Among the Latvian-speaking respondents, this percentage is much higher, which seems to be related to their mentality, which is characterized by a tendency to individual activity, and, possibly, higher self-organization.

Particular difficulties arise with programs of creative directions (for example, computer design), where it is very difficult to conduct classes remotely, since the study of many subjects (construction, painting, etc.) requires the personal presence and control of teachers.

*Answers of Russian-speaking respondents (translated):*

- Yes. You can get used to it.
- Yes. I am an adult and quite capable of controlling and organizing my time.
- Distance learning is not appropriate for the program, and now most of the subjects and their mastering are carried out independently using search of the information, not with the help of a teacher. It turns out to be self-study, not distance learning.
- Education in lecture hall is better.
- It is difficult to master new information completely independently
- Information is extremely difficult to acquire, in comparison with the usual lectures at the academy.
- A good distance learning lecturer is better than “live” lectures by a bad lecturer.
- Convenient, I do not waste time on the driving to the academy.
- It is possible, but sometimes it is difficult to understand the material while at home, rather than at the university.
- Certain subjects are difficult to understand remotely.
- Because of the language barrier, it is very difficult to perceive information by ear without presentations and the teacher’s ability to translate that part of the information that you did not understand.
- The absence of a teacher does not make it possible to solve emerging issues.
- There is no communication with teachers to the extent desired, during some consultations appear problems
- Not all materials are available in the Moodle, but reach us as emails. As a result, they are not sorted and difficult to understand. Some courses contain only one file with a course description and no other files. It is so difficult for a designer to study and work at home, where is no appropriate equipment, and searching for materials in the mail, when only a distance learning environment is available, only complicates the process. Some teachers did not even try to establish contact with the students, however, they had our contacts.
- There is no contact between the subject and the teacher
- It is not clear what I am paying for.
- It is more convenient to study from home.
- I prefer to be face-to-face with the teacher, listen to and write down the lecture, and then at home to repeat the material.

- Design programs are not intended for distance learning. There are subjects that require certain conditions and direct contact with the lecturer. And also there is no single platform on which all the teachers and give us material in an accessible way. Due to the unpreparedness for such a situation, we lost a lot of time waiting for the process to be established.
- There are no lectures, no explanations, but there are assignments. It is not logical to do assignments for subjects we did not have an explanation. We are also not provided with the materials.
- No verbal communication. While distance learning, there is no opportunity to ask the teacher about the question that interests you in detail. Also, sometimes there was a problem of connection (the material was not heard)!
- It is possible to learn, although the quality of the education is not as good as during face-to-face contact.
- Only an English teacher can be listened to in a group, which is as a real lecture, which unites the group and there is punctuality – the obligation to be in place at a specific time with a specific task. While chatting with teachers, each in their own time is difficult.
- I'm looking forward to receive my assignments back.
- Solve problems with lectures, because some could not be found in the records. The recordings of lectures are not from the very beginning, we are missing information!

*Answers of Latvian-speaking respondents (translated):*

- Easy to combine work and study.
- I am responsible.
- I like lectures in classrooms more, because it is more understandable
- Most likely yes, it is acceptable, but there are some practical tasks that are difficult to complete without a teacher.
- Difficult due to the large amount of material, but possible. Difficulties arise, when I have been doing one job for a long time, and having sent it, it turned out that I misunderstood the essence of the task or worked for a long time in the wrong direction. During face-to-face learning, the teacher immediately notices mistakes and asks to correct them. The distance learning process takes longer, but the volume of material remains the same.
- Due to the fact that I live far from Riga, distance learning suits me, but it's still good when I manage to meet with the teachers at the Academy.

- If I wanted, I would initially choose distance learning. It is difficult to understand the subject without face-to-face consultations.
- There is an opportunity to combine work and study.
- Personally, I think it is important that the teacher and the student are in the same room. This helps create a more organic learning environment in which students and teacher can actively work together, which is much more difficult in a virtual environment.
- I can plan my time, and for me, as a working person, this is very important. It is very profitable financially, because I live more than 100 km far from the Academy.
- I save the time that I spent on the driving to the academy, and at the same time I receive information in order to understand the subject.
- Slightly difficult as my teenager also has distance learning.
- Mostly we have very creative tasks. Everything else can be found on the internet.
- Yes, but it is much more difficult to learn on your own.
- There is no need to rush to submit work. But I miss face-to-face lectures.
- No, it is very important for me to be in the auditorium. A completely different quality of education.
- I am not from Riga, so my family saves money this way.
- Distant learning is tiring, I have a lack of contact with people.
- There is no contact with lecturers, and if there is a question, it is not clear who to ask, you also have to wait for an answer.

*Answers of English-speaking respondents:*

- Learning from home is original and very convenient.
- No. It is very difficult, because the teacher cannot convey a lot of information to the students and sometimes we do not understand what the teacher wants to teach us.
- I can choose when I will do assignments. I can attend lectures from different places: home, cafe, another city, and so on. It is very convenient.
- It doesn't suit me at all. It's boring and fake.
- I prefer to study in class. Distance learning is tiring and causes headaches. Sometimes I don't quite understand what the teacher is saying.
- Easy to ask questions during and after lectures.

**10. Are you generally satisfied with the organization of training through distance learning technologies?**

RUS	LV	ENG
3,70	3,67	3,5
Average – 3,62		

**11. Your recommendations for improving the distance learning process.**

- Lack of communication, you need to meet in person!
- It was surprisingly nice to see how convenient Moodle is. It's a pity that we only found out about it at the end of the fourth year!
- It would be nice if there were more online lectures, so far only one subject is online.
- Constant communication with students. Informing about the learning process.
- I would like to note, the only minus is, when a teacher asks to upload a file with homework to the "folder for downloading the assignment", some students cannot do this and have to send the files by e-mail.
- Thank you, everything is great!
- I would like to add a volume slider. Often you have to make your browser quieter. Instead of "general notes", which any student can see, make personal ones. Would be comfortable.
- More learning materials from teachers in the online access.
- I recommend to some teachers clearly explain the tasks and the educational material.
- For the Latvian-speaking students, translate and complete all courses in Latvian, as some of them have to be searched for in the Russian sections, although since September there are full-fledged Latvian-speaking groups.
- I think it would be nice to allow teachers during distant learning to give some of the information in another language.
- It would be great if you did not have to persuade teachers to broadcast online and for the broadcasts to be conducted on time without any requests from the students.
- Download all lecture materials into the Moodle system and establish contact with teachers there. If classes require oral presentation, to make them available to download as there are many factors that interfere listening to them.

- I'm really looking forward to receive my assignments back. I would like to receive it faster.
- There is confusion with the schedule, but this is the issue of Educational department.

*Answers of Latvian-speaking respondents (translated):*

- To give less tasks to complete, because I still have to teach your children and work. Not enough time.
- To make sure that all lectures are accurately on time. I want lecturers to answer, and have all the information available.
- Distance learning is possible, but human relationships are important too.
- Everything is good. I like!
- I would like to all the lectures be recorded so I could watch them later.
- Reduce volume of the material.
- Please arrange the list of courses. It is difficult to find the right course as there are 3 or more courses with the same title and teachers often start streaming in the wrong courses.
- Patience to you!!!
- Ensure communication with teachers so that they can respond on emails and inform about the quality of submitted work (what is correct, what is wrong, how to get the task done better). Also, create a general list of homework, so that it is clear for which course is the task, and that deadline is indicated.
- Lecturers should more plan and prepare for lectures so that there is no system overload that can slow down the learning process.
- I would like all teachers to use one platform and all video lectures would be automatically saved, then those students who for some reason were not there could listen to them.
- More often inform students through do.bsa.edu. Wish everyone the patience!
- To inform students about further actions when the information is 100% known.
- Thanks to the teachers. The learning is going well.
- Distribute materials so each student can easily find the necessary lectures.
- There is no possibility to listen to lectures via phone in Moodle system, only online version or presentation.

- It seems that it would be easier if the system had only the subjects of my course, and not the entire branch and the materials of all teachers.
- Teachers need to communicate more with students. If there is a lecture, lecturers should be contacted, not only by email.
- It is necessary to provide really necessary classes, not just “go there and read such and such a lecture about such and such a topic, and already from this topic look for questions and write about your topic”.
- Reduce volume of the material. Work through, think over the lesson scheme so that everything is accurately on time.
- Distance learning can be used as additional educational material, but close contact with classmates and teachers is required.
- It would be nice to have all the lectures.
- More communication.
- I would recommend to improve the quality of the Internet, although I understand that this does not depend on the teacher. Many thanks to the teachers who are learning to use new technologies with us and are very patient. The lectures are very interesting. 1 year, Social work.

*Answers from English-speaking respondents:*

- You can try other methods of delivering lectures online, something else may be more effective.
- The fact that learning is now online does not mean that we have nothing else to do at home. Most teachers think so and overload us with homework and presentations. Distance learning does not mean that the lecturer can force you to get in touch during weekends and public holidays, which sometimes happens.
- Everyone loves real discussion and learning. You can study at home, but I don't understand everything. Therefore, I prefer to study at the university.
- Teachers usually read presentations like robots, so lectures are boring. Please communicate with students more, it would be more attractive and interesting for students.
- I enjoyed studying at Moodle, but there is no direct download section. I recommend adding a section to download materials directly.
- The sound system needs to be improved. Downloading files and videos during lectures should be available.



### **Conclusions based on the results of the questionnaire-based survey**

1. The use of different platforms for distance learning: Moodle, Google Classroom, Zoom, Skype, Whatsapp, Webex, Hangout, E-mail, Without any, Facebook showed that the majority of students preferred to use the **Moodle** system – 128 students out of 192 respondents (66.66%).
2. The experience of previous distance learning helped the majority of students (68, 66%) to find the necessary information quite easily and successfully.
3. Among the various forms of delivering educational information (video, audio, text), 91.66% of the lessons used video-audio presentations.
4. Most of the trainees did not experience problems with feedback from teachers – on average, by flows – 88.0%.
5. The majority of students (on average by flows – 88.66%) believes that the teachers managed to present educational materials in a clear and accessible way.
6. Independent work, in the opinion of the students, was carried out at the proper level – homework was assigned and checked (the average score by the flows was 90.66%).
7. 77.0% of students consider it possible and acceptable to study independently using distance learning technologies.
8. Accurately according to the schedule and in full scope, distance learning classes were conducted: Latvian flow – 84.0%; Russian flow – 69.0%; English flow – 56.0%. Average – 69.66%.
10. In general, students assessed their satisfaction with the organization of learning through distance learning technologies at 3.62 points on a five-point scale, which is significantly higher than the average.

The conducted questionnaire-based survey of students highlighted only part of the problems that arose during the transition to completely remote learning. Moreover, these are problems “through the eyes of students”, at the first stage of a pandemia and in relation to only one university. To the problems identified by the questionnaire, one should add such negative consequences for higher education in general as 1) an increase in the student workload; 2) an increase in the methodological load of teachers and support personnel; 3) reduction in the number of foreign students; 4) decrease in the international mobility of students,

academic and administrative staff of universities; 5) reduction in the number of priority internships at high-ranking universities; 6) a decrease in the quality of training specialists in areas requiring full-time (offline) training practice – doctors, engineers, geologists, etc. 7) an increase in learning costs; 8) falling of incomes of universities and states; 9) deterioration of the financial situation of some teachers and administrators of universities; 10) psychological discomfort of teachers and students accompanying any innovation; 11) the absence of personal emotional contact between the student and the teacher (after all, for full communication, not only oral communication through the e-system is needed, but also the use of body language and facial expressions, empathy and psychological comfort from live communication), an individual approach, emotional coloring of the proposed material through the personality of the teacher.

Due to the fact that the first wave of the pandemic was followed by the second, it became necessary to improve the emerging technologies of methodological and technical support of education in higher education sphere or even to develop a new paradigm, because it is obvious that *education will not be the same*. The format of university education will also change, but the goals remain the same: to form universal skills: the ability to study, work with information, acquire new technologies, think critically, creatively approach problem solving and provide knowledge, skills and abilities of professional activity in the chosen specialty (Nikiforov, 2020).

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## **Методическое и техническое обеспечение дистанционного обучения в период пандемии**

### **Резюме**

Целью статьи является описание проблем методического и технического обеспечения удаленного обучения в период пандемии. Эмпирической основой для выявления этой проблематики послужил анкетный опрос студентов латышского, русского и английского потоков Балтийской международной академии, проведенный в апреле-мае 2020 года. Опрос показал, что: 1) 77,0 % студентов считает возможным и приемлемым обучаться самостоятельно с помощью технологий дистанционного обучения; 2) предшествующий опыт использования компьютерных технологий помог большинству обучаемых (68,66 %) адаптироваться к переходу на полностью удаленное обучение; 3) среди различных форм преподнесения учебной информации 91,66 % занятий использовали видео-аудио презентации; 4) 88,0 %. обучаемых не испытывали проблем с обратной связью с преподавателями; 5) свою удовлетворенность организацией полностью удаленного обучения студенты оценили на 3.62 балла по пятибалльной шкале. Новизна публикации представлена объектом исследования — процессом удаленного обучения в период пандемии.

**Ключевые слова:** удаленное обучение, анкетный опрос, проблемы методического и технического обеспечения.

## MIGRATION CRISIS AND THEIR CONSEQUENCES FOR THE EUROPEAN COUNTRIES

The processes of international labor migration are multilevel and multi-vector. Their external social and economic effects are complex and multifaceted and have an ambiguous impact on the economies of donor and recipient countries. The mass arrival of migrants from the Middle East and Africa to Europe is determined as “migration crisis.” The purpose of the study is to comprehensively substantiate the theoretical aspects of international migration, as well as to develop on this basis practical recommendations for overcoming the migration crisis in Europe. Achieving this goal requires solving a set of such tasks: to outline the essence and features of international migration in the global economic system; to study effects of international migration on countries; to determine the reasons of the migration crisis in Europe; to assess the European migration crisis; to study the consequences of migration for European countries; to suggest ways to overcome the migration crisis in Europe. The research methods are general methods (historical and economics, analysis and synthesis) and statistics method. The novelty of the article is proposed directions of migration problem minimization in European countries. In the article the theoretical base of migration features has been determined, the European migration statistics have been analyzed, the main reasons of migration crisis have been highlighted.

**Key words:** migration, crisis, labor, Europe, social, influence, effects.

### Introduction

Migration crisis is a complex crisis with strong social effect. First, the crisis is humanitarian, marked by the death and suffering of thousands of people. Secondly, the crisis in the management of both the border and the granting of asylum, in particular the procedures under which the country responsible for determining the status of an asylum seeker is determined in the EU. Thirdly, it is a crisis of solidarity, as solidarity is the basis of the unity of the European Union, and finding a common solution to the mass influx of refugees that would allow a more even distribution of the burden on individual countries and their migration services has proved extremely difficult.

As a result, the migration crisis threatens the EU's fundamental achievements, especially the existence of a free movement zone (Austria, Belgium,

Denmark, Germany, Norway, Slovenia, Hungary and Sweden have resumed control of the EU's internal borders). In the conditions of the crisis, extreme political forces are becoming more active, the mood of a part of the population is radicalizing, which threatens the growth of xenophobia and racism. Immigration has become the most painful problem for Europeans, leaving behind economic hardship and unemployment. And the leadership of the European Union has declared the regulation of migration one of the 10 main priorities. In general, the study of this topic by various researchers is quite controversial and ambiguous, so the phenomenon of migration crisis is still a debatable issue for specialists studying modern migration processes, as well as for heads of state and politicians.

A lot of researchers paid attention to this problematic and its different aspects. Mainly we should mention Konovalov V. (2010), Malinovska O. (2010), Menshikov V. (2013; 2017), Moysey V. I. (2015), Sardak S. (2017), Shushpanov P. G. (2009), Stukalo N. (2018), Stupnytskyi O. (2008), Zvonar J. P. (2015), Dudin M. N., Frolova E. E., Kovalev S. I., Ermakova E. P., Kirsanov A. N. (2017), Scholten P., van Nispen F. (2015) who investigated the issue of labor migration at global, regional and national levels.

There are research works about different aspects of migration crisis in European countries of such scientists as L. Ansems de Vries (2016), M. Carballo et al. (2017), L. Chouliaraki et al. (2017), C. Cummings et al. (2015), N. Dines (2018), T. Dragostinova (2016), J. Esteve (2018), G. Lazaridis (2015), P. Pallister-Wilkins (2016), J. Park (2015), A. Porumbescu (2019), O. Torfimova (2017), S. Wallaschek (2020). These authors discussed migration processes in Europe, migration management, dangers of migration for social sphere, cross-European migration, reasons, drivers and regional trends of migration, national migration strategies of different countries in Europe.

The aim of this article is to propose the ways of migration crisis solving in social context. Achieving the aim of the article requires solving a set of such tasks: to outline the features of international migration in the global economic system; to study the effects of international migration on countries; to analyze the European migration statistics; to determine the reasons of the migration crisis in Europe; to study the consequences of migration for European countries; to suggest ways to overcome the migration problem in Europe.

## Methods

Research methods are based on general scientific principles and fundamental theories of economic theory, the theory of globalization and migration. The methodological bases of the study are statistic methods of analysis (for analysis and comparison of international migration in the European region). The study used the following general methods to solve the tasks:

- historical and economic (to study the types of labor migration);
- methods of analysis and synthesis, deduction, induction, generalization and system analysis (for generalization, systematization of views and approaches of scientists on the situation of migration crisis in Europe with advantages and disadvantages of population migration).

The use of the above methods allowed obtaining the authors' proposals to mitigate the negative effects of migration in European countries.

So, the authors' research methodology consists of several stages: literature review (historical and economic methods, methods of analysis and synthesis), statistical analysis, proposals (Figure 1).

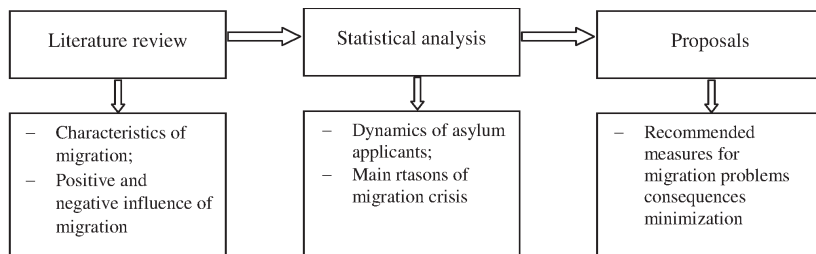


Figure 1. The methodology of the study

**Source:** The information base of the research consists of scientific publications of the authors on migration issues, Eurostat statistics, Internet resources.

## The research and results

Population migration plays an important role in the modern world and covers almost all countries of the world. The movement of labor across national borders is part of the social process of population migration – very complex in nature, diverse in form and consequences. This process is influenced by various demographic, political, socio-economic and other factors, but it should be noted that international migration, in

turn, affects the development of socio-economic systems at the national, regional, supranational and global levels. Moreover, in modern conditions, international labor migration is an important factor in the configuration of the world economic system, so a number of problems arising from this phenomenon need to be addressed at the supranational level, as rightly pointed out by researchers.

In the XXI century. formed a global system of migration flows, which covers almost all countries. Globalization processes in combination with rapid changes in global political and economic systems have contributed to the intensification of global migration flows, led to the formation of a fundamentally new immigration situation in the world with the following important features (Malinovska, 2010):

- unprecedented expansion of the scale and geography of international immigration;
- transformation of the structure of international migration flows;
- crucial importance of labor migration;
- steady growth and structural “insurmountability” of illegal labor migration;
- growth scale and expansion of the geography of forced migration;
- increasing the importance of international population migration in the socio-economic development of the modern world economic system;
- the dual nature of modern immigration policy of a number of developed countries.

Thus, international labor migration is a complex systemic socio-economic phenomenon, the essence of which is that certain parts of the labor force of some countries work in the economies of others, and there is a constant movement of labor between countries to sell labor. As for the structure of international labor migration, the division into types is carried out on many grounds, we propose such a typology for the separation of the structure (see Table 1).

Regarding the impact of international labor migration on the economies of donor countries and recipient countries, it should be noted that, since the migration of low-skilled migrants is the most massive, it would be logical to expect one and large external economic effects. However, we emphasize that this does not mean that in the study of the effects of international labor migration can be neglected labor migration with a high level of intellectual capital. Such migration affects the economy of the donor country and the recipient country differently (creates fundamentally different externalities) than the migration of low-skilled labor.

Table 1.

**Signs of division and types of international labor migration**

Separation sign	Type of migration
Legal status of a migrant	Legal, illegal
Duration	Temporary (long-term, short-term, step, pendulum, cyclic, seasonal, rotational), permanent
Geography of movement	By distance (regional, interregional, intracontinental, intercontinental); in the direction (East – West, North – South, West – East); by types of settlements (village – village, village – city, city – village, city – city)
Number of migrants	Individual, family, group
Level of intellectual capital of migrants	Migration of low-skilled labor, migration of highly skilled labor
Method of organization	Organized (public, private, independent), unorganized

Source: Shushpanov P. G (2009), Stupnytskyi O. (2008).

There are the following reasons for the emergence and existence of external labor migration from donor countries (Konovalov, 2010):

- high population density, which can be explained, in particular, by the demographic boom in some countries (for example, in India, China, Nigeria);
- mass unemployment, due to scientific and technological progress (is a factor in creating technology that requires less service personnel), the closure of extractive industries due to the exhaustion of natural resources, insufficiently balanced social policy of some states, changes in the needs of the country and others. The biggest problems with unemployment occur in densely populated regions of the world and in underdeveloped countries, which often coincides. Densely populated are mainly South and Southeast Asia, North and Central Africa, the northern part of Latin America. At the same time, in some developed countries there is a saturation of the economy “white-collar”, and therefore they become unemployed;
- low standard of living and relatively low wages. At the same time, there are fewer and fewer people in developed countries who want to do hard, low-skilled “dirty work”, and therefore there are vacancies for it;
- production need (for professionals who work in developing countries).



The effective impact of international labor migration on the economy of the recipient country of labor is given in Table 2.

Table 2.

**Influence of international immigration in the economy  
of the recipient country**

Positive	Negative
Increase labor force in the economy, growth volumes production, domestic market (due to increase income); – additional inflow of intellectual capital and knowledge into the economy; – smoothing structural disproportionate labor market; – depreciation of the cyclical process of unemployment; – improving the age structure of labor in the short and long term (for family migration); – increasing the competitiveness of products due to lower labor costs of migrants compared to local workers; – savings on pensions and other social benefits (in case of temporary migration).	– Increasing the budget burden due to additional social costs (mainly in the case of constant migration, family migration and the presence of “strong unemploy- ment trap”); – increase in the budget burden due to “strong” and “local” unemployment traps; – growth of the shadow sector of the economy; – additional costs to neutralize the increase of social tension and criminalization (mainly in the case of illegal migration).

Source: Moysey V. I. (2014; 2015).

Table 3.

**Influence of international immigration on the economy  
of the donor country**

Positive	Negative
1	2
Reducing tensions in the local labor market; – investment of potential migrants in education; – reducing the level of unemployment (and / or increase wages); – reducing the budget burden through unemployment benefits and other budget expenditures (education, health); – growth in come population due to transfers of migrants; – demand in the domestic market of goods and services on account of transfers;	“Outflow of brains”, qualified personnel, as a consequence – technological lag; – reduction of GDP; – possible increase in inflation with a large advantage of foreign transfers; – reduction of labor force in the long run.

1	2
– investments of migrant families at the expense of transfers; – the possibility of returning skilled workers who have gained experience and education abroad (for “free”); – reducing poverty.	

Source: Moysey V. I. (2014; 2015).

The avalanche of immigration flows from the developing countries of the world to the highly developed states is caused not only by political instability in the world and military conflicts and the use of weapons of mass destruction, but also by economic factors and the desire of European asylum seekers to improve.

The main factors of migration processes in European countries are:

- historically formed reasons, caused, first of all, by immigration to Europe of the population of former colonies;
- economic factors, which include payments and benefits that immigrants can receive in the European countries, as well as compensation for other needs, providing a higher standard of living than in the result countries;
- social and cultural factors, which are family reunification, the formation of a sustainable image of a “better life” in European countries through the social networks of migrants, developed social infrastructure in Europe, etc.;
- humanitarian factors (policy of hospitality, tolerance, ensuring the rights and freedoms of refugees).

According to Eurostat (information mid-March 2019) – in 2018 in the European immigration agencies were submitted a little less than 581 thousand applications for asylum. The price is much less than in the midst of the migration crisis in 2015, when such statements were more than 1.2 million, according to experts, now we can talk about the end of this crisis.

The official European statistics showed that in 2018 2.4 million immigrants entered the EU-27 from non-EU-27 countries and at the beginning of 2019 21.8 million people (4.9 %) of the 446.8 million people living in the EU-27 were non-EU-27 citizens (Eurostat, 2019). It is significant. In 2018 EU-27 Member States granted citizenship to 672 thousand persons. Thus, migrants became the part of European culture and society.

Table 4.

## Number of extra EU 28 asylum applicants

Year	2010	2011	2012	2013	2014	2015	2016	2017	2018
1	2	3	4	5	6	7	8	9	10
EU 28	259,400	309,040	335,290	431,090	626,960	1,322,825	1,259,955	712,235	647,165
Germany	48,475	53,235	77,485	126,705	202,645	476,510	745,155	222,560	184,180
France	52,725	57,330	61,440	66,265	64,310	76,165	84,270	99,330	120,425
Greece	10,275	9,310	9,575	8,225	9,430	13,205	51,110	58,650	66,965
Italy	10,000	40,315	17,335	26,620	64,625	83,540	122,960	128,850	59,950
Spain	2,740	3,420	2,565	4,485	5,615	14,780	15,755	36,605	54,050
United Kingdom	24,335	26,915	28,800	30,585	32,785	40,160	38,785	34,780	38,840
Netherlands	15,100	14,590	13,095	13,060	24,495	44,970	20,945	18,210	24,025
Belgium	26,080	31,910	28,075	21,030	22,710	44,660	18,280	18,340	22,530
Sweden	31,850	29,650	43,855	54,270	81,180	162,450	28,790	26,325	21,560
Switzerland	15,425	23,615	28,400	21,305	23,555	39,445	27,140	18,015	15,160
Austria	11,045	14,420	17,415	17,500	28,035	88,160	42,255	24,715	13,710
Cyprus	2,875	1,770	1,635	1,255	1,745	2,265	2,940	4,600	7,765
Finland	3,085	2,915	3,095	3,210	3,620	32,345	5,605	4,990	4,500
Poland	6,540	6,885	10,750	15,240	8,020	12,190	12,305	5,045	4,110
Ireland	1,935	1,290	955	945	1,450	3,275	2,245	2,930	3,670
Denmark	5,065	3,945	6,045	7,170	14,680	20,935	6,180	3,220	3,570
Slovenia	240	355	295	270	385	275	1,310	1,475	2,875
Norway	10,015	8,990	9,675	11,930	11,415	31,110	3,485	3,520	2,660

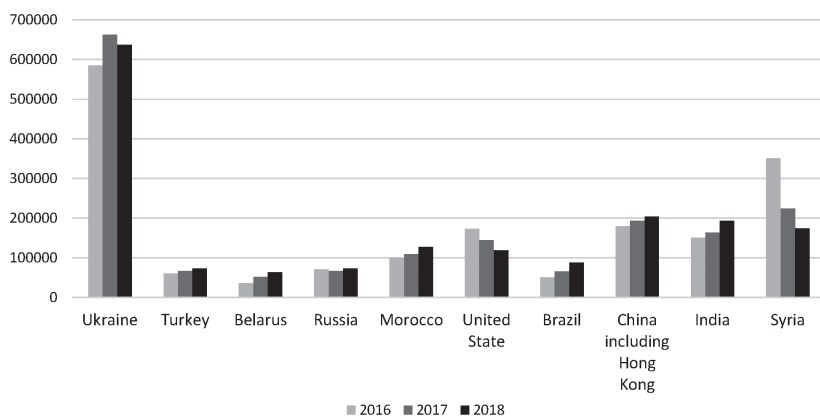
1	2	3	4	5	6	7	8	9	10
Bulgaria	1,025	890	1,385	7,145	11,080	20,365	19,420	3,695	2,535
Luxembourg	780	2,150	2,050	1,070	1,150	2,505	2,160	2,430	2,335
Romania	885	1,720	2,510	1,495	1,545	1,260	1,880	4,815	2,135
Malta	175	1,890	2,080	2,245	1,350	1,845	1,930	1,840	2,130
Czech Republic	775	750	740	695	1,145	1,515	1,475	1,445	1,690
Portugal	155	275	295	500	440	895	1,460	1,750	1,285
Croatia	–	–	–	1,075	450	210	2,225	975	800
Iceland	40	75	115	125	170	345	1,125	1,085	775
Hungary	2,095	1,690	2,155	18,895	42,775	177,135	29,430	3,390	670
Lithuania	495	525	645	400	440	315	430	545	405
Latvia	65	340	205	195	375	330	350	355	185
Slovakia	540	490	730	440	330	330	145	160	175
Liechtenstein	105	75	70	55	65	150	80	150	165
Estonia	35	65	75	95	155	230	175	190	95

Source: Eurostat, 2019

The main leader in the number of migrants in Europe is Germany, the number of migrants who enter this country is quite stable, in 2018 the number of asylum applicants was 184.2 thousand people (Table 4). Since 2017, the number of migrants in Germany has decreased. Most of them were in 2015 and 2016. Along with Germany, the key positions of leaders among European countries-recipients are: France (120.4 thousand people), Greece (67 thousand people), Italy (60 thousand people), Spain (54.1 thousand people) and the United Kingdom 38.8 (thousand people). The lowest number of asylum applicants among European countries (less than a thousand people) in 2018 was in Croatia, Iceland, Hungary, Lithuania, Latvia, Slovakia, Liechtenstein and Estonia. Therefore, these countries have no basis for the negative effects of the migration crisis.

Thus, we identify the migration crisis in Europe for such countries as Germany, France, Greece, Italy, Spain, Great Britain.

Developments for the number of first residence permits issued, by country of citizenship, EU-28, 2016–2018 (1000 persons).



**Figure 2. Citizenships of the first residence permits issued in 2016–2018, EU-28**

Source: Eurostat, 2019.

According to the Figure 2, in 2018, citizens of Ukraine (527 000 beneficiaries, or 16.3% of the total number of first residence permits issued in the EU-28) received the highest number of first residence permits, ahead of citizens of China (206 000, or 6.4%; note all data presented for China include Hong Kong), India (197 000, or 6.1%), Syria (174 000, or

5.4%), Belarus (138 000, or 4.3%), Morocco (127 000, or 3.9%) and the United States (120 000, or 3.7%) (Eurostat, 2019). The main reasons for migration from these countries to the EU-28:

- political instability;
- low socio-economic development;
- military conflicts (for Ukraine and Syria);
- low level of economic socialization;
- motivation to seek better living conditions;
- higher wages.

Citizens from Brazil, Turkey and Russia, all three below 100 000, followed. Above half (54 %) of all first residence permits issued in the EU in 2018 were issued to citizens of these ten countries (Figure 2) (Eurostat, 2019).

The situation with migration in European countries escalated in early 2020, due to the sharp aggravation of the situation in Syria, in the province of Idlib. On February 29, Erdogan stated that his country had opened its borders with the European Union to Syrian refugees and would not close its doors – the Turkish authorities began to guide and encourage the movement of illegal migrants; Ankara allowed more than 100,000 refugees to enter the European Union through its borders. On the border between Greece and Turkey (in particular, on the island of Lesbos) were border breaches of illegal migrants and clashes with border guards and police. Ministers of Foreign Affairs of the EU member states convened an emergency meeting; It was stated that the developing Greek-Turkish border immigration crisis provoked by Ankara for political purposes, stipulating, however, that recognize: Turkey itself faced a migratory burden and was forced to accept 3.7 million migrants and refugees (Dudina, Tarasenko, 2020).

The number of international migrants has tripled since 1970, and the migrant share of the world's population rose from 2.3 percent to 3.5 percent of the world's 7.7 billion people in 2019. Asia (84 million) and Europe (82 million) have over 60 percent of the world's migrants (RMN, 2020).

The current situation in Europe is called the second “resettlement”. Such large-scale migration flows affect the political, economic and demographic processes of European countries. The current situation will lead to the following main consequences (Zvonar, 2015):

- 1) The growth of labor. Thus, today in Germany in great demand in the labor market are workers with skills in mathematics, information technology and science.

- 2) Solving the problem of aging Europe. The aging population of Europe contributes to labor shortages. The growth of the labor force in the form of migrants can increase the birth rate, becoming a counterweight to the aging process. According to Eurostat, the lowest birth rate is observed in countries with the largest economies – Germany, Italy and Spain.
- 3) Increasing the burden on the economy. Despite the fact that migrants may join the ranks of workers, there are serious concerns that many of the newly arrived refugees from Africa and the Middle East have no education or professional skills – that is, they will be an additional burden on the economies of host European countries.
- 4) Protests against immigration. Over the past few years in Europe, anti-immigrant sentiment is growing, and the current migration problem has divided public opinion in half. Many opponents of migration have changed their views after receiving information on the statistics of mortality of migrant children and adults who died on the way to Europe. In many European cities, demonstrations and protests began to be held more and more often, both against migrants and in their support.

Measures that need to be taken to address the problem of illegal migration in the EU, aimed at: financing search and rescue missions, allocation of funds and means to combat migrant carriers, effective economic socialization (Simakhova, 2018).

### **Conclusion**

International labor migration has two systemically interconnected components: stable (number of immigrants and emigrants in specific economies) and dynamic (primary and secondary international labor migration flows over a period). Although international labor migration can be structured on many grounds, but from the standpoint of its impact on the economies of donor countries and recipient countries labor forceful features of division are the legal status of migrants, their number and level of intellectual and cultural capital. International labor migration is influenced by many factors, social as well.

Powerful migration flows are directed to the European continent, although during the financial and economic crisis the scale of immigration decreased, but the departure from European countries was much smaller

than expected. Increasing requirements for migration policy due to the fact that its scope is constantly expanding. It is addressed not only to migrants themselves, but also to persons belonging to the second or third generation of newcomers who have citizenship of EU countries, however, due to their origin, differ from the mass of the population in educational level, level and areas of employment, property status, etc.

We identified migration crisis in Europe for such countries as Germany, France, Greece, Italy, Spain, Great Britain. The highest number of first residence permits in EU resieved in 2016–2018 the citizens of Ukraine, China (include Hong Kong), India, Syrya, Belarus, the countries with unstable political situation, low socio-economic development, low level of economic socialization and other problems.

In summary, in our opinion a number of measures should be identified that need to be taken to address the problem of illegal migration in EU countries, aimed at:

- financing search and rescue missions;
- allocating funds and means to deal with migrants;
- expanding the network of refugee reception centers for their temporary deployment and assistance;
- simplifying legal opportunities for immigration to the EU;
- encouraging refugees to return home and implement appropriate programs on the priority of voluntary departure of immigrants to their home;
- to unify the common European migration legislation and the legislation of individual countries in accordance with the migration crisis of today;
- cooperation of EU with the countries of transitive economy and developing countries in the fiels of illegal migration;
- minimal social support of the migrant and correct politics of socialization for them.

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## **Миграционный кризис и его последствия для стран Европы**

### **Резюме**

Процессы международной трудовой миграции многоуровневые и много-векторные. Их внешние социальные и экономические последствия сложны и многогранны и неоднозначно влияют на экономику стран-доноров и стран-получателей. Массовый приезд мигрантов из стран Ближнего Востока и Африки в Европу определяется как «миграционный кризис». Цель данного исследования — всесторонне обосновать теоретические аспекты международной миграции, а также разработать на этой основе практические рекомендации по преодолению миграционного кризиса в Европе. Для достижения этой цели необходимо было решить комплекс следующих задач: выяснить сущность международной миграции в мировой экономической системе; изучить причины и последствия международной миграции для европейских стран; определить основы миграционного кризиса в Европе; оценить европейский миграционный кризис на основе статистических данных; изучить последствия миграции для европейских стран; предложить пути выхода из миграционного кризиса в Европе. Методы исследования: общие методы (исторический и экономический, анализ и синтез) и статистический метод. Новизна статьи заключается в том, что предлагаются направления минимизации миграционной проблемы в странах Европы. В статье определены теоретические основы особенностей трудовой миграции, проанализирована европейская миграционная статистика, выделены основные причины миграционного кризиса.

**Ключевые слова:** миграция, кризис, рабочая сила, Европа, социальный, влияние, эффекты.

## LOCAL DEVELOPMENT OF THE COMMUNE IN THE CONTEXT OF PRESENCE OF MILITARY UNIT

Military units located in the territory of individual communes have a varied impact on local development. Their importance is potentially greater in smaller communes, where military units as employers, tax payers, principals and contractors, as well as entities integrating the life of the local community, play one of the key roles in the context of boosting development. In these communes there is a strong link between the military unit, its size and the condition of the commune, where the majority of activity is linked to the presence of the military. The units in these locations influence the presence in the commune of a specific combination of characteristics that distinguish this space from other territorial units. One of such communes is the commune of Orzysz located in the Warmian Masurian Voivodeship, whose development path has been linked to the military unit located there for many decades. Therefore, the following research objective was adopted. The aim of research is to determine how the local government and residents of a small city see a military unit located on its territory in the context of its participation in social and economic development processes and its assistance in searching the new development path by commune using the example of Orzysz.

The objective was achieved applying the following research methods – literature analysis, the diagnostic survey, utilising the interview technique and the CATI, text mining.

**Key words:** local development, links, military units, trajectory of development.

### Introduction

The phenomenon of development is considered on the basis of local and regional development theories, which describe and explain the importance of particular elements located in the space, giving recommendations to public authorities to take specific actions to maintain or dynamise development.

Local development is a process of diversification and enrichment of economic and social activity in a given territory, which consists in amassing and coordination of resources and energy (Jewtuchowicz 2005; Wojsławicz 1996). Among the factors of local development, we identify both economic, social, technical and technological as well as environmental and spatial factors. The importance of individual factors changes over

the years, reflecting the transformations that take place in individual territories. The social, economic, institutional and cultural potential of the territorial units determines their development possibilities and their ability to respond to crisis phenomena such as: depopulation, disintegration of social ties, migration for work, weakening of economic potential, insufficient resources of investment capital (<https://samorzad.pap.pl/kategoria/praca/122-miast-srednich-tracacych-funkcje-spoleczno-gospodarcze>), increasing costs of infrastructure maintenance.

Among the entities that can influence the development of particular places in space are military units (military bases) (Andersson, Lundberg, Sjöström, 2007; Hicks, Raney, 2003; Stenberg, Rowley, 1993). These units, as components of the armed forces, participate in the implementation of defence, crisis response, stabilisation and support tasks. They form the foundation of security and indirectly affect the development of the communes in which they are stationed. Their location in different parts of the country results from operational conditions. In some communes, the presence of the army favours local development, while in others it leads to certain limitations (Hughes, 1997). The extent and strength of the influence of military units on development varies and depends on a number of factors which are not always easy to identify. Sometimes it is only the liquidation of a military unit or a change of its staff, resulting in a limitation of the unit's size that allows us to notice the dependencies that exist in the arrangement of a military unit – entities in its closer environment (Piotrowska-Trybull, Sirko, 2019; Ignasiak-Szulc, Piotrowska-Trybull, 2019; Piotrowska-Trybull, 2013; Paloyo, Vance, Vorell, 2010).

The research conducted since 2010 allowed authors to come up with the following conclusions (Sirko, Piotrowska-Trybull, Wojtaszek, 2020; Sirko, Kozuba, Piotrowska-Trybull, 2019; Sirko, Piotrowska-Trybull, 2019, 2018; Sirko, Piotrowska-Trybull (ed.), 2013).

Army influences the social and economic situation of individual commune:

1. The presence of the army in a local territory is assessed differently by local authorities, residents and entrepreneurs.
2. Army impacts on labour market, local finance, technical infrastructure, environment and land management.
3. Army can be analysis as an entrepreneur, buyer, supplier, taxpayer, constructor of some element of local infrastructure and participant in a process of land management especially in neighbourhood.

## **Methodology**

The research, whose results are presented in this article, was financed from the task “Military units in local communities – social, economic, environmental context” and from the task “Cooperation of local entities for security and development of local society” within the framework of statutory activities of War Studies University. The research were conducted by research team: Stanislaw Sirko, Marzena Piotrowska-Trybull.

The research covered twelve small and medium-sized towns, where military units representing various types of armed forces were stationed. In the first stage of the research, a library investigation was conducted and statistical data were collected, which are the basis for analyses of the socio-economic situation of selected cities. In the second stage of the research, a survey was carried out using the survey technique and the intelligence technique. The survey of residents and interviews with representatives of local authorities were conducted based on research tools designed by the research team – a survey questionnaire and an interview questionnaire. During the research, the respondents expressed their opinion on the relationship between the military unit and the local government unit, in social, economic and environmental terms.

The analysis of the material collected during the survey was carried out with the use of Statistica v. 13.3 and Excel software. On the other hand, the analysis of text from recorded interviews was carried out using R v. 4.0.0 and RStudio editor. The analysis of texts (figure 3) was based on the solutions presented in the works of (Grolemund and Wickham, 2018; Lula, 2018; Kwartler, 2017; Silge and Robinson, 2017; Murphy 2017).

This article presents only the results of the survey carried out in the commune of Orzysz. The case of the commune of Orzysz is extremely interesting, allowing to observe how the changes taking place over the years in the context of the presence of the army in the commune influence its development. The survey technique involved 97 residents of Orzysz, including 49 women and 48 men.

## **Results of research.**

### **Orzysz in the perspective of army presence**

Orzysz has been a garrison commune since 1895. In the interwar period Orzysz was a dynamically developing city. Residential buildings for soldiers with connection to the water supply system, lighting and a

mess deck were constructed. The development of the garrison led to the creation of the “city within the city”, the technical infrastructure, including the railway infrastructure, was being developed, which, among other things, facilitated the movement of the army (<http://www.orzysz.pl/index.php?k=98>; <http://orzysz-wojskowastolicapolski.pl/index.php?k=6>).

After the Second World War, social and cultural institutions were established in Orzysz (city library, tourist and tourist society, garrison club, schools) and production plants providing services for the army. As a result of these changes, the number of inhabitants of the city increased from about 300 in 1945 to 5.200 in 1969 (<http://www.orzysz.pl/index.php?k=98>). What is more in this territory powerful rockets and nuclear warhead carriers were stationed. Military unit located there was under control of the Soviet Union. Additionally, this cause many limitations in everyday life (it was forbidden to stay in the street for more than a few minutes; photographs were not allowed). In these years activities of the military unit have dominated the civilian sphere in economic development.

In 1991 the penal company, which started its functioning in 1971, was liquidated. The number of soldiers decreased. Army model was restructured towards professional army. The military limited its functions focusing on training, gave up running shops, tourist facilities and canteens. The military land and facilities were handed over to the city.

In 1995 the 4th Suwałki Armoured Cavalry Brigade was formed in Orzysz, which was disbanded in 2001, and after that the military complexes were taken over by the 15th Mechanised Brigade in Giżycko. In addition, in 1997, the staff of the Lithuanian-Polish Peacekeeping Forces Battalion was established in Orzysz, and since 2017, among others, American troops have been stationed here, whose task, in accordance with NATO plans, is to strengthen the Suwałki Pass (<http://www.orzysz.pl/index.php?wiad=15887>). The added value of their presence is the benefits for the local community resulting from increased demand for selected products and services.

Neighbours of Orzysz Ruciane Nida, Mikołajki, Giżycko, Pisz were developing in terms of tourism and Orzysz was looking for the direction of city development. Apart from the natural direction of tourism development, the military was also used. And now the military, in addition to such factors as favourable geographical location and tourist values, is one of the development factors of the town of Orzysz.

Others important factors of development are investments in infrastructure and EU funds which were used for them, as well as the increased

interest of tourists in staying there. The presence of a military unit in Orzysz and the image of the garrison town contribute to the creation of facilities, as well as to the initiation by local and military authorities of various types of undertakings causing the increased interest of investors and tourists, including the military lovers. And so, for example:

- the reputation of the “penal company” was used and the Tiger’s 40 km run with 80–100 obstacles was recreated on the training ground;
- Orzysz created advertising slogan “Orzysz, the military capital of Poland”;
- the Military Museum of the Orzysz region was established;
- staged battles, equipment demonstrations, etc. are organised every year.

In the opinion of mayor of the city practically every family has someone who is or was a soldier. This opinion is confirmed by the answers of the respondents, 70% of whom declared that there are people in the family who have worked or who work in a military unit. This indicates the common experience of working in the unit, in the local community (Figure 1).

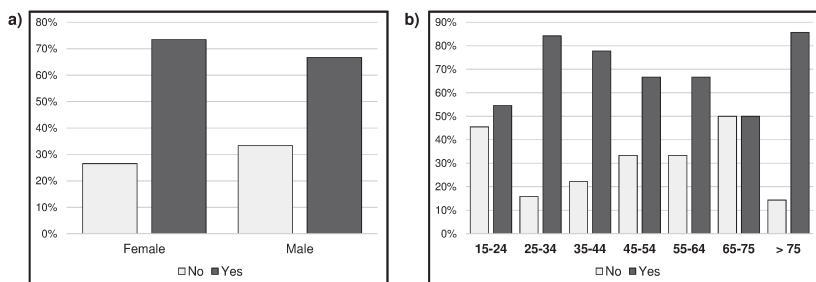


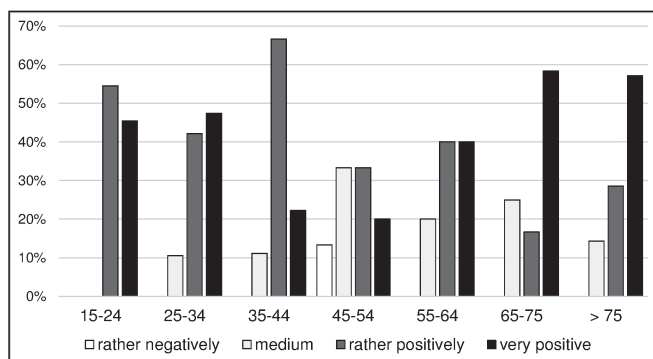
Figure 1. Respondents by sex (a) and age (b), whose family members worked or are working in the military unit

Source: own study.

When asked how the presence of a military unit in the city affects the feeling of security of the inhabitants, half of the respondents answered that it definitely increases the feeling of security – 50.5%, followed by 36.0% of the respondents stating that it rather increases. Slightly more than 10% answered that the unit does not affect the feeling of security, 1% answered that its presence reduces the feeling of security, while 2% of the respondents were unable to give a single answer.



Then the respondents were asked about the general assessment of the military unit's presence in the commune. The majority of respondents assessed it rather positively – 42% and very positively – 39%, the average assessment was given by 16.5% of respondents, while 2% replied that they assessed it rather negatively (Figure 2).



**Figure 2. General assessment of the presence of a military unit in the commune, by age of the respondents**

Source: *own study*.

In order to find out how the respondents perceive the individual and with which areas they identify its impact on the development of the commune, they were asked to indicate which of the proposed statements they agree with. Respondents could indicate only one area which in their opinion is most significant. As a result, three of the most frequently indicated areas were included: provides revenues to the local budget – 28.86%; keeps the demand stable – 19.95%; it favours the creation of new jobs – 12.37%.

Table 1.

**Influence of the military unit in Orzysz commune in opinion of respondents**

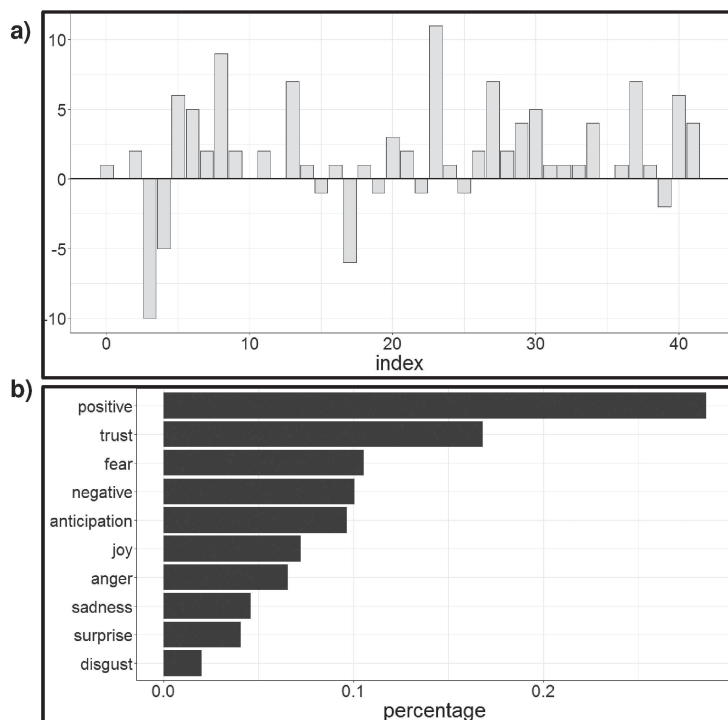
Presence of military unit	%
1	2
It favors the creation of new jobs	12.37
It helps to keep jobs	8.25
It favors the strengthening of patriotic attitudes among children and youth	8.25

1	2
Limits the outflow of people	7.22
Provides revenues to the local budget	28.86
Contributes to the influx of people	7.22
It favors the development of local companies/ increases their trade turnover	8.25
Keeps the demand stable	19.59

Source: *own study*.

A positive opinion on the presence of a military unit in the commune was also expressed by the mayor of the city, who stressed its importance for the labour market and stabilisation of the population in the commune. At the same time, the mayor stressed that local companies adapt their offer of products and services to the requirements of soldiers, including those from other NATO countries stationed in Orzysz. In addition, the inhabitants attend language courses to break down the communication barrier. As he stressed, the presence of the army and the organisation of joint ventures with soldiers make it possible to promote Orzysz in Poland and abroad.

During the interview with the representative of the authorities in Orzysz, positive emotions and trust dominated (Figure 3), which allows to conclude that the military unit is valid for the local community and economy. Describing the relationship between the military unit and the city, their changing fates were highlighted. In the interview there were also negative emotions, fear, sadness, accompanying the description of the situation at the beginning of the 1990s, when the army was limiting its number and activity, apart from training activities. The restrictions resulted in the closure of some entities providing services to residents, including the many soldiers stationed here. In turn, positive emotions appeared in the interview in connection with the description of activities that the representatives of the city carry out in cooperation with the army, which resulted in greater recognition of the city, an influx of tourists and investors. The resources of investors and funds from projects co-financed from EU funds allow to change the face of the city, one of the distinguishing features of which is the army, which, as the mayor stressed, the authorities are trying to use.



**Figure 3. Mood change (a) and distribution of emotions (b) during the interview in Orzysz**

Source: *own study*.

The surveyed group was attended by a large number of respondents who conducted business activities, hence the question whether they take into account the presence of a military unit in the commune when making business decisions. Most of them, as much as 82% answered affirmatively, 18% denied (Figure 4). The obtained result proves that the military unit has strong economic links with entities located in the commune. The unit, as it was emphasised, at the outset can commission work to be carried out by external companies, which perform various types of construction and repair works, as well as supply products and services for its benefit. On the other hand, the presence of soldiers and their families in the context of demand from local companies is an important factor stabilising their trade turnover.

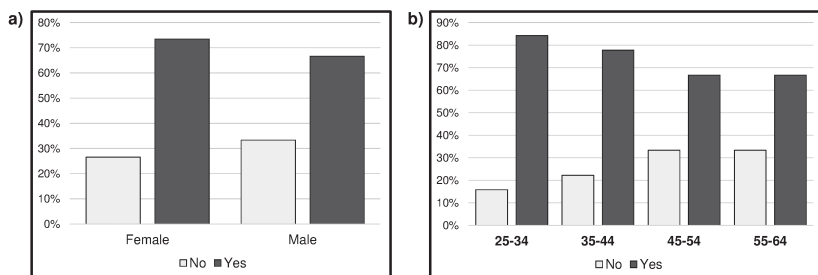


Figure 4. Do you consider the presence of military unit when making business decisions, respondents by sex (a) and age (b)?

Source: own study.

The importance of the military unit for the community, and the local labour market in particular, is indicated by the answers of respondents to the question: Would the liquidation of the military unit worsen the situation on the local labour market? Over 90% of the respondents to the question asked in this way answered: definitely yes (62%) and rather yes (32%). However, 4% of the respondents answered – probably not, and another 4% – that it is difficult to say (Figure 5). This result corresponds to the results obtained in other communes, where the respondents emphasised the potentially negative impact of the liquidation of the military unit on the situation in the local labour market (Piotrowska-Trybull, Sirko, 2018).

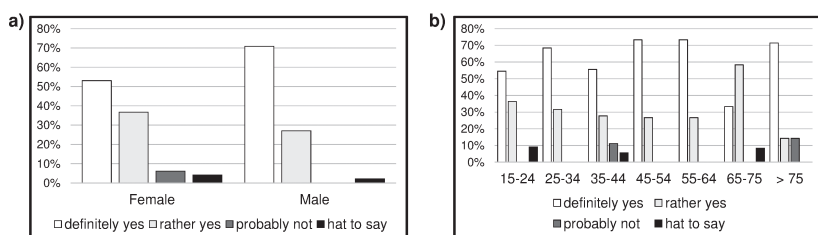


Figure 5. Would the liquidation of the military unit worsen the situation on the local labour market, respondents by sex (a) and age (b)?

Source: own study.

The presence of the unit in the commune is associated with the generation of noise, which is generated in particular during exercises and

training sessions taking place on the training ground. Among the respondents, 94% confirm the generation of noise by the unit (definitely yes 62%; rather yes 32%), 4% answered that it rather does not generate noise and another 4% did not formulate an explicit response.

### Conclusions

The army stationed in Orzysz gives the city a certain difference to other cities in the Warmian-Masurian Voivodeship, but also in Poland. Positive assessments of the presence of the army and its impact formulated by the inhabitants and representatives of local authorities suggest that it plays an important role in its development. The respondents particularly notice the influence of the army in the context of the financial situation of the city, the stabilisation of the inhabitants' income and the labour market.

Among the factors which determine the development of Orzysz are the values of the environment, its geographical location and the army. Therefore, the local authorities, appreciating the presence of the unit, organise joint undertakings aimed at promoting the city and strengthening its image as the military capital of Poland.

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### **Локальное развитие муниципалитетов в контексте наличия военной части**

#### **Резюме**

Армия, дислоцированная в Оржише, отличает город от других городов Варминьско-Мазурского воеводства, а также Польши. Положительные оценки присутствия армии и ее воздействия, сформулированные жителями и представителями местных властей, говорят о том, что она играет важную роль в ее развитии. Респонденты особо отмечают влияние армии в контексте финансового положения города, стабилизации доходов жителей и рынка труда.

Среди факторов, определяющих развитие Оржиша — ценности окружающей среды, его географическое положение и армия. Поэтому местные власти, высоко оценивая наличие подразделения, организуют совместные мероприятия, направленные на продвижение города и укрепление его имиджа как военной столицы Польши.

**Ключевые слова:** местное развитие, связи, воинские части, траектория развития.

## CONGRUENCE OF MARKETING AND ORGANIZATION'S INVESTMENT IN SUSTAINABLE DEVELOPMENT

The paper examines researchers' views on sustainability and marketing congruence. **The aim** of the research is to provide theoretical provisions on congruence of organization's investment in sustainable development and marketing. **The tasks** of the article: to identify the main issues related to the lack of sustainability integration in organizations business strategy; to analyze the link between marketing and sustainability. **The methods:** systematic analysis of scientific literature, general and logical analysis, methods of comparison and generalization are applied. (Pakseresht 2016), (Kumar 2016), (Caprita 2016) conducted research on what are key drivers of sustainability. Meanwhile, (Arseculeratne 2014) analyzed the link between green marketing and company reputation. But it should be noted that according to the consumption level, marketing, and sustainable development are on opposite sides. It's noteworthy that the link between marketing and sustainable development is particularly strong due to the functions of marketing in a market economy. **The scientific problem** can be identified as follows: how can be identified congruence of marketing and organization's in sustainable development. According to conducted analysis, it should be noted that marketing and sustainable development are seen as very different concepts based on current stereotype. The existence of this congruence is emphasized in recent studies. The analysis of scientific articles revealed a variety of approaches that enable congruence between organizations' sustainable development, investment in sustainable development and marketing. It was found that congruence between sustainable development investments and marketing can be expressed in terms of green or sustainable marketing. As much as possible the more company invests in sustainable marketing, the more revenue a company can earn. It should be emphasized that sustainable marketing is oriented not only towards the satisfaction of consumers and company profits, but also towards the goals of the community as a whole, such as social goals and the protection of environment.

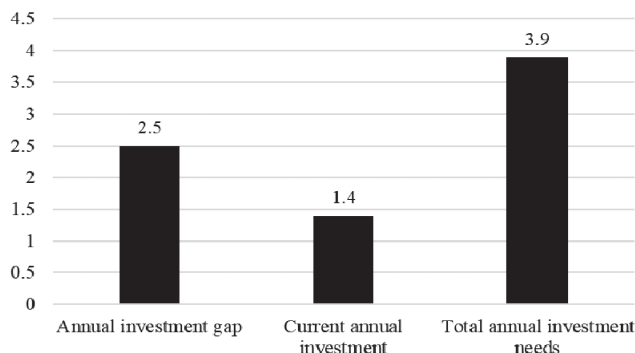
**Key words:** sustainable development, green marketing, sustainable marketing, sustainable investment.

Sustainable development is no longer new for today's organizations. It can be assumed that an organization which has nothing similar with a sustainable development – has no future. It should be noted, that many organizations incorporate sustainable development issues in their practice because of a necessity to assure competitive advantages, in order to meet



regular requirements and the rules of winning tender. According to (Lazar 2017), regardless of the reasons for the sustainable development of activities, these effort benefits the community and the environment.

The indisputable fact is that investing in sustainability is a necessity. For example, United nations conference on trade and development (2014) estimates that an investment of \$3.9 trillion is needed on average each year from 2015 to 2030 in order to fully meet the 17 Sustainable Development Goals in developing countries alone. It further estimates that only about 36 per cent of this investment need is being met by current public investment plans. The remaining \$2.5 trillion per year represents a gap that the private sector could potentially help address, as illustrated in Figure 1. Consequently, companies must have an interest in investing in sustainable development. However, it is no secret that the goal of every profit-seeking company is to make a profit. Not surprisingly, a return on investment is expected and proper marketing can help attract it.



**Figure 1. Estimated annual investment needs in developing countries, trillions of United States dollars**

*Source: Made by authors based on United Nations Conference on Trade and Development, 2014.*

A problem is encountered – investors in sustainable development need updated standards, indices and measures to facilitate the dissemination of information about the company's impact on people, the planet and earned (Lauesen 2019). While sustainability is an ethical issue, it is also becoming relevant from a marketing perspective and may be particularly so important in stakeholder relations (Baldassarre 2016). Companies can address this issue in a variety of ways, choosing whether to publicize

their good behaviour or design a responsible attitude. According to (McPhee 2014), sustainable thinking drives innovation – technology, production, marketing, business model innovation. It is argued that today's sustainable business models should focus on more than the simple vision and goal setting. Sustainable business model should clearly set out new one's actions and new behaviours that would change the way of a company's interaction with the world. Noteworthy that it is increasingly recognized that sustainable investment is good for business and investors do not necessarily have to choose between returns and positive impact. This can be explained by the fact that sustainability information can be used to better management of long-term risks, reduction of costs and potentially enhancement of return while meeting regulatory requirements. (Miles 2000) state that increased requirements to simultaneously improve financial performance and environmental performance encourage companies to seek innovative ways in order to utilize environmental or green marketing and management as a source of enhancing reputational and competitive advantage.

(Tollin 2015) conducted research in order to analyze the main reasons why companies have not started to integrate sustainability into their business strategy. They suggested to managers (those who want to start or further develop a sustainable business) to spend a lot of time and effort dealing with and promoting the idea of sustainability and thus making clear what sustainable business is (i.e. the long-term perspective, balance between micro and macro issues, broad partnership of innovation processes, proactive position strategy development, etc.). According to (Pakseresht 2016), consumer demand is a key driver of sustainability. What is more, (Kumar 2016) offer to classify the stakeholders concerned according to their economic, social, environmental and regulatory aspects. (Caprita 2016) conducted a research the link between green marketing and company reputation. She has investigated that the progress of the organization correlates with green marketing thus creating more powerful links between the organization and consumers. (Arseculeratne 2014) state that green marketing value have been recognized by organizations as a step towards catering to customer needs while appreciating the significance to the growth and expansion of a business. It should be noted that the concept of green marketing have changed over time. Today this concept entails certain fundamental elements. Marketing products which are environmentally safe; developing and marketing products to minimize environmental hazards;

produce, promote, and package products in a manner be-fitting so as to protect the environment are some characteristics of green marketing (Arseculeratne 2014). Green marketing involves establishing a link between the business and customer; and this process entails a holistic approach since business will naturally have to integrate all its activities in line with environmental concerns. (Peattie 2001) identifies three stages in the evolution of green marketing: ecological marketing, environmental marketing and sustainable marketing. As (Rakic 2015) point out, sustainable marketing can be understood as a more radical approach towards market and marketing as seeking to fully meet environmental costs of production and consumption while creating a sustainable economy. There is a need for organizations to identify socio-ecological problems as a starting point of the marketing process, understand consumer behavior holistically, reconfigure marketing mix for sustainability and develop long term relationships with stakeholders. Sustainable marketing, among other things, represents a call to have corporate time horizons and value continuity over profit lengthened.

Integration of marketing communications into the digital space has increased. It is realized that social media is valuable tool in building digital relationships with customers. (Dovleac 2019) researched that social media is the right tool for businesses to spread information on sustainability issues. It can be argued that consumers consume more when they make decisions about purchasing by digital marketing and social media helps businesses strengthen relationships with clients. It is said that most companies are just now starting to use social networks like this like Facebook, Twitter, YouTube.

(Kamiński 2016) shows that the link between marketing and sustainable development is particularly strong, arising from the functions it performs marketing in a market economy consisting of a pair of goods, market demand for action by customers developing and meeting needs. Marketing and investing in sustainability are expected to face many challenges in the future. For example, (Grubor 2017) state that understanding of consumers' behavior, business processes and sustainable branding, encouraging a wide audience to adopt sustainable issues will be one of the key challenges for the future and a key stage in a thriving business.

According to (Löbler 2017), only two resources are limitless: solar energy and human creativity. The challenge of sustainable marketing is to harness these two unlimited resources in order that all other constraints

could be overcome. The congruence of marketing and organization's investment in sustainable development can be detected from a management standpoint, as much as possible the more company invests in sustainable marketing, the more revenue a company can earn (Capatina 2017). Moreover, organizations may achieve competitive advantage by positioning and differentiating on the basis of sustainable development (Rakic 2015). It can be stated that sustainable marketing of organizations can lead towards sustainable development. Sustainable marketing is oriented not only towards the satisfaction of consumers and company profits, but also towards the goals of the community as a whole, such as social goals and the protection of environment. Instead of orientation towards sustainable development because of public pressure, socially responsible companies should redirect themselves towards achieving goals of sustainable development. (Peterson 2013) proposes a term of sustainable enterprise. Sustainable enterprise is an organization that can anticipate and meet the needs of present and future generations of customers and stakeholders through creating and innovating new business strategies and activities that accelerate positive social change; protect and preserve environmental integrity, while enhancing business performance. Sustainable enterprise incorporates principles of sustainability into each of its business decisions, it supplies environmentally friendly products or services that replaces demand for non-green products and/or services, it is greener than traditional competition, and has made an enduring commitment to environmental principles in its business operations (Zu 2013). An important basis for sustainable enterprise is sustainable marketing. (Hunt 2012) states that sustainable marketing is normally considered to be within even broader area of sustainable development. There is a need for organizations to maintain sustainable relationships with customers, the social environment and the natural environment. Despite the obvious fact that the need for sustainable development exist, but redirection process from unsustainable into sustainable development can be difficult. This process is time-consuming and requires huge amount of investments. As sustainable development is a long-term goal of organizations and countries, so there is a need of holistic management of sustainability at the level of governments and organizations.

To sum up, despite the growing focus on sustainable development, investment is insufficient. A joint strategy between governments and business is needed to secure greater investment to address sustainable development issues. In general, congruence between sustainable develop-

ment investments and marketing can be expressed in terms of green or sustainable marketing. It should be emphasized that sustainable marketing is oriented not only towards the satisfaction of consumers and company profits, but also towards the goals of the community as a whole, such as social goals and the protection of environment.

### Conclusions

1. Many organizations incorporate sustainable development issues in their practice because of a necessity to assure competitive advantages, but it's not enough. There is a huge gap of current annual investment. So private sector can contribute to decrease this gap and address more concern on sustainable development issue. One of the tools enabling this process – could be a sustainable marketing.
2. Green or sustainable marketing involves establishing a link between the business and customer; and this process entails a holistic approach since business will naturally have to integrate all its activities in line with environmental concerns.
3. The congruence of marketing and organization's investment in sustainable development can be detected from a management standpoint, as much as possible the more company invests in sustainable marketing, the more revenue a company can earn. It should be emphasized that sustainable marketing is oriented not only towards the satisfaction of consumers and company profits, but also towards the goals of the community as a whole, such as social goals and the protection of environment.

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## **Конгруенция маркетинга и инвестиции организации в устойчивое развитие**

### **Резюме**

Устойчивое развитие уже не новость для современных организаций. Согласно сложившимся стереотипам, маркетинг и инвестиции в устойчивое развитие рассматриваются как совершенно разные концепции. По уровню потребления маркетинг и устойчивое развитие находятся на противоположных сторонах. Примечательно, что связь между маркетингом и устойчивым развитием особенно сильна благодаря функциям маркетинга в рыночной экономике. Многие организации включают вопросы решения устойчивого развития в свою практику из-за необходимости обеспечить конкурентные преимущества, но этого недостаточно. Существует огромный пробел в текущих ежегодных инвестициях в устойчивое развитие, который частный сектор потенциально мог бы решить, и маркетинг мог бы стать инструментом, позволяющим это сделать. Зелёный (экологический) маркетинг предполагает установление связи между бизнесом и покупателем, лояльным клиентам. И этот процесс предполагает целостный подход, поскольку бизнесу, естественно, придётся интегрировать всю свою деятельность в соответствии с экологическими проблемами, взаимоотношением с природной средой. Совмещение маркетинга и инвестиций организации в устойчивое развитие может быть определено с точки зрения менеджмента: чем больше компания вкладывает в устойчивый, зелёный маркетинг, тем больший доход она может получить. Таким образом, можно выразить конгруенцию между инвестициями в устойчивое развитие и зелёным маркетингом.

**Ключевые слова:** устойчивое развитие, зелёный маркетинг, устойчивый маркетинг, устойчивые инвестиции.

## **MĀCĪBU PROCESA KVALITĀTES MONITORINGA PRAKTISKĀS PIELIETOŠANAS IZVĒRTĒJUMS TIESĪBSARGĀJOŠO INSTITŪCIJU PROFESIONĀLĀS IZGLĪTĪBAS IESTĀDĒS**

Profesionālās sagatavošanas izglītības iestādēs kvalitātes nozīme mūsdienā apstākļos, kad ir novērojams konkurences pieaugums izglītības pakalpojumu jomā, ko stimulē nelabvēlīgās demogrāfiskās situācijas tendences un darba tirgus augstās prasības pēc kvalificēta darba spēka, arvien pieaug. Patreizējā problemātiskā situācija Eiropas Savienības robežu drošības un migrācijas jautājumu griezumā un no tās izrietoši izaicinājumi nosaka kvalitātes vadības sistēmu esamības un efektivitātes aktualitāti arī izglītības iestādēs, kas sagatavo personālu tiesībsargājošo institūciju vajadzībām (turpmāk – tiesībsargājošo institūciju izglītības iestādes). Savukārt, kvalitātes vadības sistēmu neesamība, formāla vai nepilnvērtīga funkcionēšana, arī attiecībā uz iekšējās kontroles elementu (t.sk. mācību procesa kvalitātes monitoringa) praktisko pielietojumu, veido mācību procesa īstenošanas un profesionālās izglītības kvalitātes valstī ilgtspējības riskus.

Kvalitātes monitoringa galvenais mērķis ir palīdzēt atklāt trūkumus un nodrošināt informatīvo pamatu attiecīgo koriģējošo darbību veikšanai. Riska situāciju veido tas apstāklis, ka, diemžēl, mācību procesa kvalitātes monitoringa nozīme joprojām brīžiem tiek nepietiekami novērtēta un izglītības iestāžu praksē tā būtība bieži vien tiek sašaurināta līdz mācību procesa gala rezultātu kvalitātes novērtēšanai. Tas neļauj pilnvērtīgi monitorēt un analizēt visu faktoru kompleksu, kas ietekmē speciālistu profesionālās sagatavošanas kvalitātes līmeni un traucē atbilstoši efektīvi vadīt mācību procesa kvalitāti izglītības iestādē.

Rakstā ir atreferēts viens no veiktā promocijas pētījuma robežsargu profesionālās sagatavošanas kvalitātes vadības jomā ietvaros posmiem, kas ir veltīts mācību procesa nodrošināšanas un norises kvalitātes monitoringa pasākumu praktiskās pielietojšanas aspektiem tiesībsargājošo institūciju (robežsardze, policija) izglītības iestādēs.

**Raksta mērķis** ir, pamatojoties uz profesionālās sagatavošanas mācību procesa visu dalībnieku kategoriju praktisko pieredzi balstītiem viedokļiem, izzināt faktisko stāvokli un problemātikas esamību attiecībā uz profesionālās sagatavošanas mācību procesa nodrošināšanas un praktiskās norises kvalitātes monitoringa pielietojšanas aspektiem pētījumā iekļautajās Baltijas valstu tiesībsargājošo institūciju izglītības iestādēs.

Kvantitatīva rakstura, uz empīrisma principiem balstīta **pētījuma uzdevumi**:

- 1) izpētīt profesionālās sagatavošanas mācību procesa nodrošināšanas un praktiskās norises kvalitātes monitoringa, kā kvalitātes vadības sistēmas (turpmāk – KVS) iekšējās kontroles elementa, pielietojšanas aspektus tiesībsargājošo institūciju izglītības iestādēs;



- 2) veikt iegūto konsolidēto datu analīzi un to interpretāciju faktiskā stāvokļa, labākās prakses subjektu un problemātikas izzināšanai mācību procesa nodrošināšanas un praktiskās norises kvalitātes monitoringa pasākumu īstenošanas jomā;
- 3) izveidot zinātnisku pamatojumu rekomendāciju sniegšanai tiesībsargājošo institūciju un citām, ar sabiedrības un cilvēku drošību programmu realizēšanu saistītajām izglītības iestādēm, rīcībai mācību procesa kvalitātes monitoringa pasākumu kompleksa funkcionēšanas pilnveidošanai KVS elementu kopas ietvaros.

Īstenotā pētījuma ietvaros, triju Baltijas valstu tiesībsargājošo institūciju un izglītības iestāžu anketēšana (kopumā 2264 respondenti). Veiktās anketēšanas gaitā iegūtie dati apkopoti, izmantojot Microsoft Excel programmatūras rīkus, un veikta to analīze – faktoru struktūras izpēte, aprakstošās statistikas un iekšējās saskaņotības noteikšana – izmantojot SPSS (“Statistical Package for the Social Sciences”) programmatūras paketes 23. versiju.

Pētījuma rezultāti dod iespēju un zinātnisko pamatu tiesībsargājošo institūciju un to izglītības iestāžu vadībai noteikt faktisko situāciju un pastāvošo problemātiku personāla profesionālās sagatavošanas mācību procesa kvalitātes monitoringā, kā iekšējās kontroles sistēmas elementa, darbībā un definēt aktuālos pasākumus KVS efektivitātes pilnveidošanai.

Pētījuma temats ir aktuāls arī Latgales reģionam, Latvijas valstij kopumā un tās drošībai tādēļ, jo tieši valsts tiesībsargājošo institūciju personāla profesionālās sagatavotības kvalitātes līmenis ir viens no svarīgākajiem priekšnosacījumiem valsts drošībai, kas, savukārt, ir viens no būtiskākajiem faktoriem, kas nosaka pašas valsts suverenitāti.

Pētījuma aktualitāti reģionālajai attīstībai nosaka triju izglītības iestāžu (Daugpils universitāte, Valsts robežsardzes koledža, Valsts policijas koledža (Latgales filiāle)) esamība un darbība Latgales reģionā realizējot attiecīgās profesionālās izglītības programmas un sagatavojot personālu Latvijas valsts tiesībsargājošo institūciju vajadzībām.

**Atslēgas vārdi:** iekšējā kontrole, kvalitātes monitorings, kvalitātes vadība, mācību process, profesionālā sagatavošana, tiesībsargājošās institūcijas.

Migrantu krīzes uz ārējām Eiropas Savienības (turpmāk – ES) robežām, masveidā patvērumu meklētāju pieteikšanās valstu iekšienēs un ar to saistītā lielā spriedze un darba slodze izraisīja zināmu problemātiku šo jautājumu risināšanā. Tanī starpā, pieaugot nelegālās migrācijas spiedienam, vairojas arī ES valstu robežu un iekšējās drošības apdraudējumi. Līdz ar to ES valstis un to tiesībsargājošās institūcijas ir saskārušās ar jauniem, līdz šim nepieredzētiem izaicinājumiem. Viens no jauniem aktuāliem izaicinājumiem un uzdevumiem robežkontroles un policijas institūcijām ir celt personāla rīcībspējas kapacitāti, pilnveidojot personāla profesionālās

sagatavotības kvalitāti ar mērķi nodrošināt darbinieku spēju efektīvi rīkoties jauno izaicinājumu apstākļos, pildot dienesta pienākumus kā savās valstīs, tā arī darbojoties starptautiskajās misijās un operācijās (Zālītis 2016).

Tiesībsargājošo institūciju darbinieku profesionālās sagatavošanas kvalitātes jautājumi vienmēr ir bijuši un joprojām ir aktuāli visā pasaulē un regulāri tiek pētīti gan Ziemeļamerikas, gan Eiropa Savienībā, gan arī Austrumeiropas valstīs (Sherman & Lawrence 1978; Kratcoski 2004; Das & Kratcoski 2007; Balendr 2018; Peres 2019; Zālītis, Davidova & Glaudiņš 2020; Zālītis, Ignatjeva, Davidova & Kokina 2020 u.c.). Neskatoties uz tiesībsargājošo iestāžu personāla profesionālās sagatavošanas un izglītības jautājumu specifiku, to pētīšanai ir noderīgas atziņas, kas izriet gan no izglītības procesu kvalitātes jautājumu problemātikas pētījumiem, ko veikuši atsevišķi zinātnieki (Štālbergs 1999; Bordovsky 2001; Pratasavitskaya & Stensaker 2010; Siliņa 2019 u.c.), gan no ES un Latvijas valsts līmenī atbalstīto projektu ietvaros veiktiem pētījumiem (Eiropas Izglītības fonds 1998; Nacionālās programmas projekts 2007 u.c.).

“Tehniskā un operatīvā stratēģija Eiropas integrētajai robežu pārvaldībai” (Eiropas Robežu un krasta apsardzes aģentūra (FRONTEX) 2019) izvirza uzdevumus “ES dalībvalstīm izstrādāt un piemērot kvalitātes nodrošināšanas mehānismus, kas attiecas uz apmācības saturu un nodrošināšanu, pasniedzējiem, apmācāmajiem un apmācības vidi”. Līdz ar to tiek plānots rezultāts, ka “kvalitātes nodrošināšanas mehānismi valsts līmenī sekmēs pienācīgu un salīdzināmu kompetenču līmeni” un nodrošinās, ka “pastāvīga apmācības novērtēšana un uzlabošana efektīvi palielinās cilvēkresursu rezervju spēju izpildīt uzticētos uzdevumus ES ārējo robežu aizsardzības jomā”.

Sistēmisks kvalitātes monitorings mūsdienās tiek uzskatīts par pilnvērtīgā mācību procesa svarīgu un neatņemamu sastāvdaļu, tiek intensīvi pētīts (Kennedy 1998; Corder 1999; Pfeifer 2012 u.c.) un ir spējīgs kļūt par efektīvu līdzekli un kompleksu instrumentu mācību procesa kvalitātes vadībā izglītības iestādē pie nosacījuma, ka tas tiek plānots un īstenots kā vienots, regulārs pasākumu kopums un ir uzskatāms par līdzekli, ar kura palīdzību var izmērīt izglītības iestādes mācību procesa kvalitātes procesuālos un rezultējošos aspektus un nodrošināt sistemātiski funkcionējošu atgriezenisko saiti aktuālās informācijas saņemšanai no visiem ieinteresētajiem mācību procesa dalībniekiem.

Kvantitatīva pētījuma empīrisko bāzi veido mācību procesa dalībnieku visu segmentu (izglītības iestāžu apmācāmie, absolventi, pasniedzēji,

administrācijas pārstāvji, darba devēju pārstāvji) 2264 pārstāvju aptaujas rezultāti. Pēc anketu kvalitātes pārbaudes pētījuma datu kopu veidošanā tika izmantoti 1324 respondentu sniegtie vērtējumi. Plaša respondentu auditorija no Igaunijas, Latvijas un Lietuvas tiesībsargājošajām institūcijām un izglītības iestādēm tika piesaistīta ar mērķi iegūt maksimāli plašu un daudzpusīgu informāciju par vadības sistēmu funkcionēšanas un mācību procesa īstenošanas un nodrošināšanas kvalitātes aspektiem robežsargu un policistu profesionālās sagatavošanas nozarē Baltijas valstu reģionā. Dati tika iegūti ar Latvijas, Lietuvas un Igaunijas tiesībsargājošo institūciju un to izglītības iestāžu vadītāju piekrišanu un atbalstu.

Aptaujas instrumentārijā tika iekļauti 35 apgalvojumi, kas raksturo mācību procesa kvalitāti tiesībsargājošo institūciju izglītības iestādēs un dod iespēju respondentiem to novērtēt. Aptaujas jautājumi tika formulēti ar uzdevumu iegūt iespējami detalizētu respondentu redzējumu par mācību procesa piekritīgajā izglītības iestādē īstenošanas un nodrošināšanas kvalitāti un atbilstību pamatmērķim – apmācāmo profesionālā sagatavošana praktiskajam dienestam tiesībsargājošo institūciju struktūrvienībās. Respondentiem tika dota instrukcija saskaņā ar vērtējumu Likerta skalu – “pilnīgi nepiekrītu”, “drīzāk nepiekrītu, nekā piekrītu”, “grūti atbildēt”, “drīzāk piekrītu, nekā nepiekrītu (daļēji piekrītu)”, “pilnīgi piekrītu” – novērtēt funkcionāli piekritīgās izglītības iestādes profesionālās sagatavošanas mācību procesa īstenošanas un nodrošināšanas kvalitātes aspektus. Faktoranalīze (Child 2006), kas tika veikta analizējot definēto indikatoru kopu un aptaujas gaitā iegūtos datus, ļāva identificēt apskatāmās parādības četru faktoru struktūru (1. attēls).



1. attēls. Identificētā četru faktoru struktūra

Avots: pētījuma ietvaros autoru izveidots attēls.

Rakstā atreferētajā pētījuma daļā tiek analizēts viens no četriem identificētiem faktoriem – “Mācību procesa īstenošanas un nodrošināšanas kvalitātes monitoringa aspekti”. Analizējamajā faktorā iekļauto indikatoru aprēķinātā faktoru slodze ir diapazonā no 0,407 līdz 0,766 (1. tabula).

1. tabula

**Analizējamā faktorā iekļautie indikatori un to faktoru slodze**

Indikatora numurs	Indikatora definīcija	Faktoru slodze
1	Izglītības iestāde praktizē regulāras absolventu anketēšanas ar mērķi apzināt aktuālo situāciju, problemātiku un ieteikumus turpmākai attīstībai	,766
2	Anketās apmācāmajiem un absolventiem tiek iekļauti jautājumi katra pasniedzēja darba aspektu individuālajai novērtēšanai (atsauksmēm)	,719
3	Izglītības iestādē praktizējas regulāra apmācāmo anketēšana ar mērķi apzināt aktuālo situāciju, vajadzības un ieteikumus turpmākai attīstībai	,711
4	Anketēšanu izglītības iestāde veic anonīmi un tas nodrošina respondentiem brīvi izteikt savu viedokli	,543
5	Izglītības iestādē tiek praktizētas regulāras nodarbību norises un pasniedzēju metodisko prasmju vērošanas-pārbaudes (hospitācijas)	,466
6	Izglītības iestādē tiek praktizēta regulāra apmācāmo sekmju un disciplīnas analīzes veikšana kā arī sasniegto rezultātu apkopošana un izvērtēšana	,440
7	Izglītības iestādē tiek praktizēta konsultāciju un citu pasniedzējiem saistošu dienas kārtības elementu administratīvās pārbaudes	,435
8	Izglītības iestādē ir izveidota un pilnvērtīgi darbojas profesionālās sagatavošanas kvalitātes vadības un nodrošināšanas sistēma	,407

*Avots: uz pētījuma ietvaros veikto aprēķinu pamata autoru izveidotā tabula.*

Respondentu izlašu vērtējumu rādītāju atšķirību statistiskais būtiskums tika pārbaudīts un apstiprināts ar vienfaktora dispersijas analīzi, (jeb ANOVA – Analysis of Variance), kuras rezultātā tika noteikts faktora kritērija (F) statistiskā nozīmīguma līmenis (Sig.) (2. tabula), kas apliecina iegūto datu ticamību attiecībā arī uz visām attiecīgo respondentu kopām.

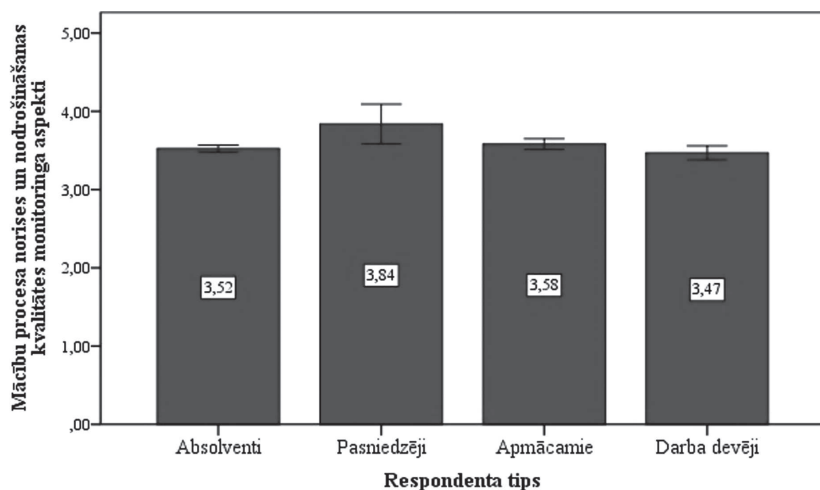
2. tabula

**Analizējamā faktora kritērija statistiskā nozīmīguma līmenis**

	F	Sig.
Sarp respondentu kategoriju izlašu grupām	4,537	0,004

Avots: uz pētījuma ietvaros veikto aprēķinu pamata autoru izveidotā tabula.

Analizējot pētījuma gaitā iegūtos rezultātus konstatēts, ka vidējo rādītāju šķērsgriezums (2. attēls) uzrāda konsolidēto ainu, kas kopumā ir relatīvi vienmērīga, bez izteikti kritiskiem rādītājiem respondentu kategoriju griezumā. Ievērojamākā konstatētā kopējo vidējo rādītāju disonanse ir tajā, ka pasniedzēju atzinumi uz kopējā fona ir salīdzinoši pozitīvāki attiecībā uz anketā piedāvātajiem apgalvojumiem, bet izglītības pakalpojuma adresāti (apmācāmie, absolventi, darba devēji) ir kritiskāki piedāvāto indikatoru novērtējumos.

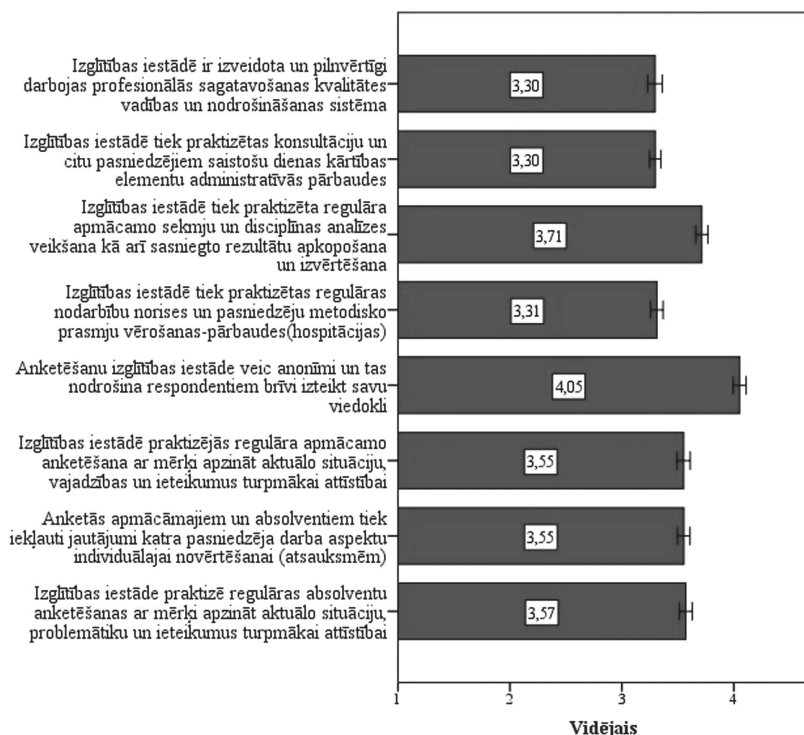


2. attēls. Kopējie vidējie rādītāji respondentu kategoriju griezumā (N=1324)

Avots: uz pētījuma ietvaros veikto aprēķinu pamata autoru izveidots attēls.

Savukārt, indikatoru vidējos vērtējumos (3. attēls) novērojama tendence, ka respondenti salīdzinoši atzinīgi novērtē (4,05) aptauju anonimitātes aspektus, bet ievērojami zemāk vērtē tādu mācību procesa norises kvalitātes monitoringa pasākumu, kā nodarbību norises un pasniedzēju meto-

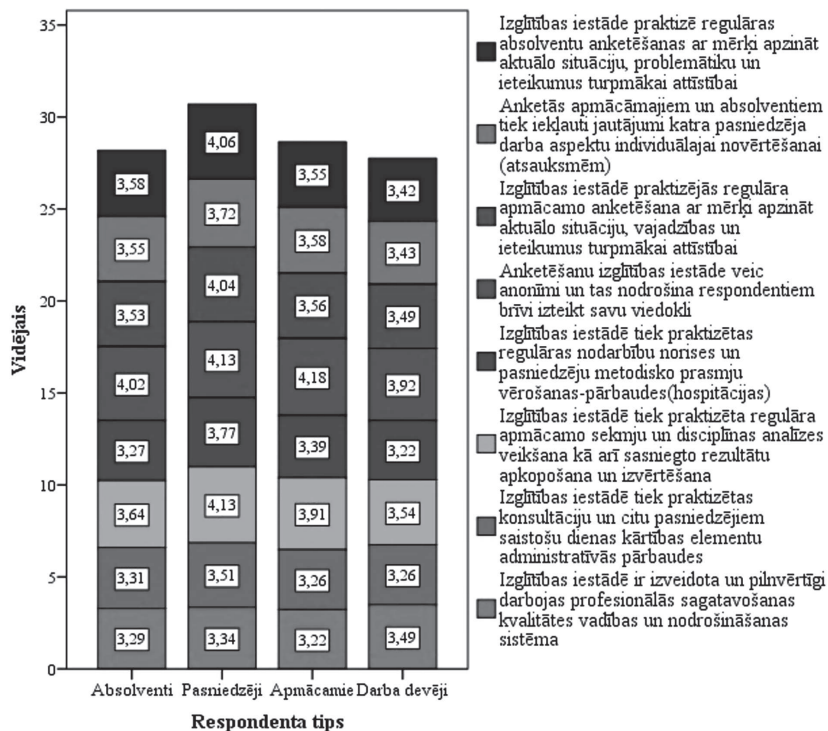
disko prasmju vērošanas-pārbaudes (hospitācijas) (3,31) un konsultāciju un citu pasniedzējiem saistošu dienas kārtības elementu administratīvās pārbaudes (3,30) īstenošanas aspektus, kas liecina par izglītības iestāžu kopumā nepietiekamām aktivitātēm doto KVS iekšējās kontroles elementu izmantošanā praktiskajā darbā.



3. attēls. Indikatoru vidējie vērtējumi (N=1324)

Avots: uz pētījuma ietvaros veikto aprēķinu pamata autoru izveidots attēls.

Neskatoties uz samēra līdzīgiem, mēreniem vidējiem rādītājiem, veicot iegūto datu analīzi atsevišķu indikatoru griezumos, ir konstatējamas relatīvi nozīmīgas atšķirības vērtējumos, kas ļauj fiksēt iespējamās problēmjautājumus KVS iekšējās kontroles jomas instrumentārijā. Līdz ar to pētījuma rezultātu vidējie rādītāji pa respondentu kategorijām indikatoru griezumā (4. attēls) dod daudz vairāk iespēju aptauju gaitā iegūto datu analīzei un sekmīgai pētījuma mērķu sasniegšanai.



4. attēls. Vērtējumu vidējie rādītāji pa respondentu kategorijām indikatoru griezumā (N=1324)

Avots: uz pētījuma ietvaros veikto aprēķinu pamata autoru izveidots attēls.

Piemēram, veicot Indikatora nr. 2 (Apgalvojums – “Anketās apmācāmajiem un absolventiem tiek iekļauti jautājumi katra pasniedzēja darba aspektu individuālajai novērtēšanai (atsauksmēm)”) vērtējumu analīzi (3. tabula), konstatēts, ka šāds aspekts apmācāmo un absolventu anketēšanā, viskūtrāk, acīmredzot, tiek piemērots Lietuvas attiecīgajās izglītības iestādēs, bet izteikti sistēmiskāk – Igaunijas tiesībsargājošo institūciju izglītības iestādēs. Dotā indikatora novērtējums Latvijas attiecīgajās izglītības iestādēs norāda uz pastāvošām rezervēm mācību procesa kvalitātes monitoringa pilnveidošanai pasniedzēju darba individuālās novērtēšanas aspektā.

3. tabula

**Indikatora Nr. 2 novērtējums respondentu valstiskās  
piederības griezumā (N=1172)**

Respondentu kategorija	Indikators Nr. 2		
	LAT	LTU	EST
Apmācāmie	3,60	3,39	3,84
Pasniedzēji	4,18	3,30	5,00
Absolventi	3,75	3,32	4,30

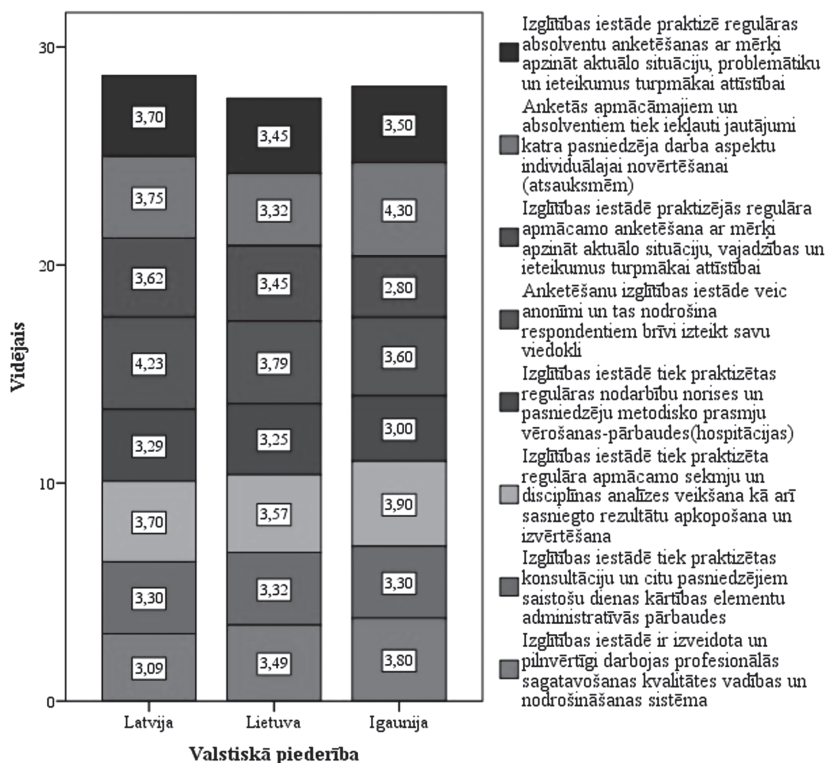
*Avots: uz pētījuma ietvaros veikto aprēķinu pamata autoru izveidotā tabula.*

Pētījuma rezultātu analīze respondentu datu un atsevišķu indikatoru griezumā dod plašu informācijas klāstu, kas ļauj noteikt mācību procesa nodrošināšanas un norises kvalitātes monitoringa pasākumu sistēmiskuma līmeni tiesībsargājošo institūciju izglītības iestādēs KVS darbības ietvaros.

Piemēram, respondentu kategorijas “Absolventi” apkopoto vērtējumu analīze liecina, ka visos respondentu datu griezumos – izglītības programmu līmenis, izglītības programmu apguves pieredze, dienesta pieredze, personīgais izglītības līmenis – indikatoru novērtējumu rādītāji ir ļoti līdzīgi, izņemot pavalstniecības griezumā (5. attēls), kur 5 indikatoros no 8 vidējo vērtējumu rādītāji atšķirās vairāk kā par 0,30. Pētījuma rezultāti dotajā griezumā norāda uz salīdzinoši atšķirīgu mācību procesa kvalitātes monitoringa atsevišķu elementu attīstības pakāpi Baltijas kaimiņvalstu tiesībsargājošo institūciju izglītības iestādēs un dod iespēju interesentiem iegūt pozitīvo to piemērošanas pieredzi.

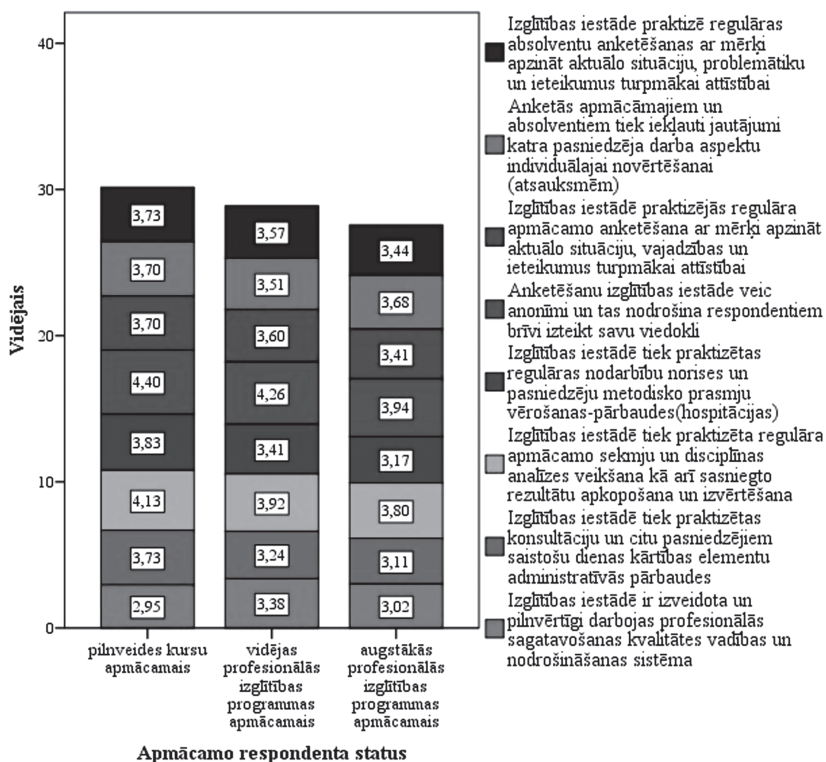
Apmācāmo aptauju rezultātu analīze (6. attēls) uzrāda tendenci, ka augstākās izglītības programmās studējošie relatīvi zemāk novērtē monitoringa pasākumu (hospitāciju) realizācijas regularitāti, t.i. intensitāti un sistēmiskumu attiecībā uz pasniedzēju darbu. Konstatētā parādība ir izskaidrojama ar atšķirīgu izglītības iestāžu filozofiju un principiem attiecībā uz hospitācijām, t.sk. ar akadēmiskās brīvības būtības diferencētu izpratni augstākās izglītības un vidējās profesionālās izglītības iestādēs, tomēr kopumā ietekmē respondentu viedokli par KVS darbības pilnvērtīgumu augstākās izglītības iestādēs.





5. attēls. Indikatoru novērtējumi valstiskās piederības griezumā (N=782)

Avots: uz pētījuma ietvaros veikto aprēķinu pamata autoru izveidots attēls.



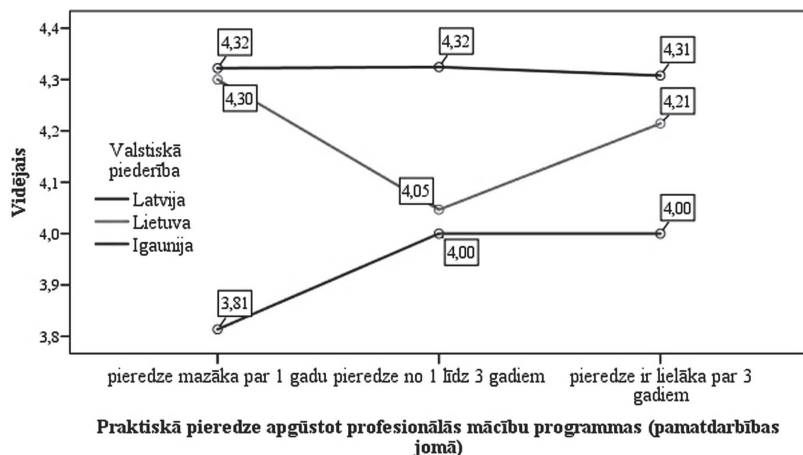
6. attēls. Indikators novērtējumi apmācāmo statusa (pēc apgūstāmās programmas līmeņa) griezumā (N=343)

Avots: uz pētījuma ietvaros veikto aprēķinu pamata autoru izveidots attēls.

Iegūto datu izpēti procesā izmantota arī divfaktoru analīzes metode, kas ļauj veikt indikatoru novērtējumu analīzi kombinētos griezumos. Piemēram, analizējot apmācāmo anketēšanas anonimitātes aspektu, kas ir Indikators Nr. 4, praktiskās pieredzes, apgūstot profesionālās izglītības programmas, griezumā (7. attēls), ir secināms, ka Latvijā visu līmeņu tiesībsargājošo institūciju izglītības iestāžu visos mācību un studiju posmos anketēšanas sistēma strādā šajā aspektā pēc stabiliem, noteiktiem standartiem. Savukārt, Igaunijas vidējās profesionālās izglītības iestādēs dotais apgalvojums tiek atbalstīts relatīvi vājāk, nekā augstākās izglītības iestādēs; Lietuvā, toties, otrādi: kā nedaudz sistēmiskāk funkcionējošs Indikators Nr. 4 tiek novērtēts vidējās profesionālās izglītības iestādēs.

Augstākminētie secinājumi attiecībā uz anketēšanas anonimitātes aspektu nav kritiski pēc būtības, bet parāda analīzes iespējas pētījuma ietvaros un norāda uz relatīvi nebūtiskām, bet tomēr konstatējamām atšķirībām KVS monitoringa elementu praktiskās piemērošanas taktikā un metodikā.

**Anketēšanu izglītības iestāde veic anonūmi un tas nodrošina respondentiem brīvi izteikt savu viedokli**



7. attēls. Indikators nr. 4 novērtējums apmācāmo praktiskās pieredzes, apgūstot izglītības programmu pamatdarbības jomā, griezumā (N=343)

Avots: uz pētījuma ietvaros veikto aprēķinu pamata autoru izveidots attēls.

Respondentu kategorijas “Pasniedzēji”, kas jāautver kā izglītotāko un kompetentāko respondentu kategoriju, vērtējumu analīze ļauj secināt, ka ir konstatējamas relatīvi nozīmīgas disonanses indikatoru vērtējumos respondentu datu griezumā pēc pārstāvētās izglītības iestādes statusa, pašu respondentu statusa izglītības iestādē un respondentu valstiskās piederības. Kā viens no raksturīgākajiem ir atzīmējams Indikators Nr. 5 “Izglītības iestādē tiek praktizētas regulāras nodarbību norises un pasniedzēju metodisko prasmju vērošanas-pārbaudes (hospitācijas)” novērtējums respondentu datu griezumā kategorijā “Pasniedzēji” (4. tabula). Novērtējumu analīzes rezultāti liecina, ka tiesībsargājošo institūciju izglītības iestādēs atsevišķos aspektos pastāv izteikti atšķirīga pieeja KVS darbības

organizācijā iekšējās kontroles elementu, t.sk. skaitā mācību procesa kvalitātes monitoringa, funkcionēšanas jomā.

4. tabula

**Indikatora Nr. 5 novērtējums respondentu atsevišķu datu griezumā kategorijā “Pasniedzēji” (N=47)**

Respondentu datu tips	Respondenta izglītības iestādes statuss		Respondenta statuss izglītības iestādē		Respondenta valstiskā piederība		
	Vidējā profesionālā	Augstākās izglītības	Pasniedzējs	Pasniedzējs ar AF	Igaunija	Latvija	Lietuva
Novērtējuma rādītājs	4,18	3,64	3,52	4,36	3,33	4,65	3,26

Avots: uz pētījuma ietvaros veikto aprēķinu pamata autoru izveidotā tabula.

### Secinājumi

1. Teorētiskās atziņas: ņemot vērā, ka pilnvērtīga personāla profesionāla sagatavošana izglītības iestādē nav sekmīgi realizējama bez detalizēti izstrādātas un praktiski ieviestas KVS, mācību procesa nodrošināšanas un norises kvalitātes monitoringa, kā iekšējās kontroles elementa, sistēmisks pasākumu komplekss, nodrošinot atgriezenisko saiti un savlaicīgus koriģējošos pasākumus, veicina KVS izglītības iestādē pilnvērtīgāku funkcionēšanu;
2. Praktiskās atziņas:
  - 2.1. Pētījuma gaitā iegūtie dati un to detalizēta analīze ļauj izzināt faktisko stāvokli un problemātikas esamību, kā arī identificēt labākās prakses subjektus attiecībā uz profesionālās sagatavošanas mācību procesa nodrošināšanas un praktiskās norises kvalitātes monitoringa pielietošanas aspektiem Baltijas valstu tiesībsargājošās institūciju izglītības iestādēs.
  - 2.2. Neskatoties uz to, ka visās pētījumā iekļautajās izglītības iestādēs atšķirīgā kārtībā un intensitātē tiek veikti mācību procesa nodrošināšanas un norises kvalitātes monitoringa pasākumi, secināms, ka KVS ir veidotas un darbojas pēc konceptuāli atšķirīgiem principiem un netiek realizēti sistēmiski sabalansēti

- mācību procesa kvalitātes vadības politika un KVS pasākumu nodrošināšana iekšējās kontroles jomā;
- 2.3. Līdzšinējās pieejas tiesībsargājošo institūciju izglītības iestādēs KVS monitoringa pasākumu administrēšanā attiecībā uz personāla profesionālās sagatavošanas mācību procesa nodrošināšanas un praktiskās norises kvalitāti nav bijušas pilnvērtīgi efektīvas, par ko liecina zināmas, atsevišķos indikatoros nozīmīgas, disonanses mācību procesa dalībnieku attiecīgo aspektu novērtējumos.
- 2.4. Veiktā mācību procesa nodrošināšanas un praktiskās norises kvalitātes monitoringa aspektu pētījuma rezultātā tika izveidots iegūto datu analīzes instrumentārijs iespējamo riska faktoru un nepilnību iestādes IKS darbībā noteikšanai, kas dod iespēju institūciju un izglītības iestāžu vadībai identificēt problemātiku un nodrošināt pasākumus kvalitātes vadības sistēmu funkcionalitātes pilnveidošanai.

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**Оценка практического применения мониторинга качества процесса обучения в профессиональных образовательных учреждениях правоохранительных учреждений**

**Резюме**

В современных условиях, на фоне роста конкуренции в сфере образовательных услуг, который стимулируется неблагоприятными демографическими тенденциями и повышенным спросом рынка труда на квалифицированную рабочую силу, возрастает важность качества профессиональной подготовки в образовательных учреждениях. В то же время, текущая сложная ситуация в сфере безопасности границ и вопросов миграции в Европейском Союзе и связанные с этим вызовы определяют актуальность наличия и эффективно-

сти функционирования систем управления качеством и в образовательных учреждениях, которые готовят персонал для правоохранительных органов (далее — образовательные учреждения правоохранительных институций). В свою очередь, отсутствие систем менеджмента качества, формальное или неполноценное их функционирование, в том числе и в отношении практического применения такого элемента внутреннего контроля, как мониторинг качества учебного процесса, создает риски для полноценной реализации учебного процесса и устойчивости качества профессионального образования в целом.

Целью исследования является выявление на основе практического опыта всех категорий участников процесса профессионального обучения актуальной ситуации и возможной проблематики, касающихся аспектов качества осуществления и обеспечения учебного процесса в рамках профессиональной подготовки, в том числе и применения мониторинга качества во включенных в исследование учебных заведениях правоохранительных институций стран Балтии.

В рамках проведенного исследования данные, полученные в ходе опроса, проведенного среди в общей сложности 2264 респондентов из правоохранительных институций и образовательных учреждений трех стран Балтии, позволяют оценить эффективность и влияние мероприятий внутреннего системного мониторинга за качеством учебного процесса, как элемента внутреннего контроля системы управления качеством, на выполнение поставленных задач в области профессиональной подготовки персонала для правоохранительных органов.

Результаты исследования дают возможность и научное обоснование для руководства правоохранительных органов и образовательных учреждений определить фактическое состояние и возможную проблематику в вопросах функционирования мониторинга качества учебного процесса, как элемента системы внутреннего контроля, в области профессиональной подготовки персонала и определить необходимые мероприятия по повышению эффективности систем управления качеством.

**Ключевые слова:** внутренний контроль, мониторинг качества, управление качеством, учебный процесс, профессиональная подготовка, правоохранительные органы.

## РОЛЬ УЧЕБНЫХ ЗАВЕДЕНИЙ ДЛЯ РАЗВИТИЯ РЕГИОНА

В данной статье автор предлагает обзор радикальных изменений в системе образования Литвы за последние 30 лет. Отмечается, что необходимые изменения в содержании образования не всегда сопровождаются рациональными и жизнью востребованными реформами. Все большую тревогу вызывают падение престижа учителей и педагогов, декларативные обещания властей обеспечить им достойную заработную плату. Снижение качества образования, ликвидация школ в малонаселенных поселках, понижение статуса высших учебных заведений негативно сказывается на качестве жизни населения, стимулирует миграцию. Автор считает, что аналогичные проблемы регионального развития присущи и другим странам Балтии.

**Ключевые слова:** образование, профессиональная подготовка, престиж профессии, централизация высшего образования, развитие региона.

После восстановления государственности в Литве, Латвии и Эстонии произошли кардинальные изменения во всех сферах жизни. Переход к рыночной экономике и вступление в Европейский Союз обусловило конкурентный характер развития как самих стран, так и их различных регионов. Если в бывшей советской империи наши страны образно назывались «советской заграницей», т.е. наиболее развитыми, то в условиях первичного транзитного периода дикого капитализма мы оказались «младшими братьями» и были не готовыми к жесткой конкуренции. В первую очередь это привело к широкому потоку миграционных процессов и значительному уменьшению численности населения. Так по данным переписи населения 1989 года в Литве жило 3 миллиона 694 тысячи жителей, в 2020 году — 2 миллиона 794 тысяч; в Латвии, соответственно, 2 миллиона 666 тысяч и 1 миллион 920 тысяч; в Эстонии, соответственно 1 миллион 566 тысяч и 1 миллион 329 тысяч. Эти невосполнимые потери вообще ставят под сомнение перспективу существования наших стран. Очевидно, что обезлюдившая территория безусловно будет заполняться другими. Кстати Литву и Китай разделяют лишь две страны — Белоруссия и Россия. А Латвию и того меньше — лишь Россия. К сожалению, приходится отмечать, что усилению миграционных процессов способствовал и развал системы образования.



Естественно, реформа образования была необходима: идеологизированная система воспитания советского человека в корне отлична от требований демократического общества. Но за прошедшие три десятилетия процесс изменений мало походил на реформу, а в большей мере на развал системы. В бывшей советской империи фактически была осуществлена структура немецкой системы образования: дошкольное образование, общеобразовательная школа, профессиональное училище, техникум, высшее образование, курсы повышения квалификации. Конечно, такая структура фактически противоречила стремлению к равенству, которое так акцентировалось советскими идеологами. В те, уже давние времена, и мои исследования включения молодежи в социальную структуру общества показывали четкую социальную детерминированность: дети интеллигенции предпочитают вуз, а дети рабочих и колхозников в большинстве — в профучилище или техникум. Конечно, отмечались и социальные перемещения, Советская номенклатура также формировалась не столь по признаку социального происхождения, а на основе проявляющихся способностей.

Компонент профессиональной подготовки был четко обозначен. Каждый сегмент системы профессиональной подготовки был четко направлен на определенный уровень необходимой квалификации (Matulionis 1990). Профучилище обучало навыкам конкретного ремесла. Техникум давал как теоретическое обоснование, так и профессиональные знания. Университет предоставлял академическую подготовку, а институт или академия были направлены на профессиональную подготовку специалистов высшего уровня. Причем, прием в учебные заведения проводился целенаправленно: вступительные экзамены на конкретную специальность.

После восстановления государственности наши страны чуть ли не автоматически переняли американскую модель образования, где социальные границы на уровне общеобразовательной школы стали даже более явными: начальная школа, прогимназия и гимназия. На более высоком уровне, наоборот, размытыми: колледж может предоставить степень бакалавра, как и вуз. Правда вуз имеет и высшие уровни: магистратуру и докторантуру, которые предоставляют ученую степень. Направленность профессиональной подготовки размыта: бакалавра можно приобрести по одной специальности, магистра по другой. Нередко магистры так и не получают полной профессиональной подготовки. Прием ведется по результатам среднего образования, причем

претендент указывает не одну, а целый список часто очень различных по профилю специальностей. Даже те, которые получают стипендию (кстати, очень скудную), нередко работают, но по другой специальности. Для учебы времени не остается.

Кроме того, надо иметь ввиду, что в демократических странах системы образования формировались длительный период и их функционирование отлажено долгими годами практики. Там роль учителя не утратила престижности. Недаром в Германии учитель является профессором. В Литве престиж профессии учителя лишь декларируется, а привлекательность этой профессии очень низкая. Явно сказывается низкий уровень зарплаты учителей. Забастовки учителей обусловили некоторый рост зарплаты, но он достигается путем увеличения нагрузки. Еще более усугубляет эту проблему ситуация с коронавирусом и в связи с этим рост напряжения и усталости учителей. Число учителей пенсионного возраста все возрастает, а лишь часть выпускников педагогического профиля начинают работать по специальности. Проблему усугубляет и искусственное подчинение бывшего университета эдукологии в Вильнюсе Университету Витаутаса Великого, находящегося в Каунасе. Все острее чувствуется нехватка учителей как некоторых специальностей, в особенности математиков, физиков, химиков, так и в сельских школах или в малых городах.

Значительный удар по системе образования произошел из-за непродуманной политики регионального развития. В отличие от Латвии в Литве было более равномерное распределение жителей. Помимо столицы Вильнюса и временной столицы Каунаса к большим городам относились крупный порт Клайпеда, а также Шяуляй и Паневежис. Быстро росли областные центры Капсукас (теперешняя Мариямполь), Алитус, Утена, Тельшяй и Таураге. Хотя в Конституции Литвы была определена роль областей, которые должны были определять более равномерное развитие территориальной структуры, их роль была сведена на нет. Вместо координации планов развития районов, входящих в состав области, и кооперации средств, эти функции переняло правительство и министерства. Определяющее воздействие на такое решение имел интерес перераспределения средств, получаемых из структурных фондов Европейского Союза. Вместе с тем, эти средства преимущественно вкладывались в строительство материальных объектов, обходя вопрос решения человеческих ресурсов. Теперь многие реновированные здания стоят пустые, так как были закрыты школы, дома культуры, почты. Для меня очень чув-

ствительным — мой отец был лесоводом — была централизация лесного хозяйства, когда было создано генеральное лесничество и отнята самостоятельность районных лесничеств и сокращено их число. Кроме того, в лесу почти не осталось самих лесоводов. Леса, в особенности частные, вырубались вчистую. Планы шведской Икея уже реализованы в Латвии и Эстонии, теперь настал черед Литвы. Лесничество, которые сопротивлялись этому произволу, были уволены, Сама профессия лесоводов была очернена, поэтому на лесоводческий факультет университета Витаутаса Великого (это как и с педагогами — создан гибридный монстр) поступило лишь несколько юношей.

Сравнительно неплохая социальная инфраструктура была и в районных центрах, даже в колхозных центрах. После восстановления государственности в период приватизации ситуация значительно изменилась. Особенно это почувствовали бывшие колхозные центры, в которых были закрыты фельдшерские пункты, дома культуры, библиотеки, почта и, что самое главное — школы. Все объяснялось необходимостью улучшения качества преподавания и экономии средств. Такие населенные пункты были обречены. Начальная миграция из них впоследствии переросла в миграцию из страны. Отрицательное влияние такой «оптимизации» особенно проявилось в отдаленных от Вильнюса районах. Так в Зарасайском районе осталось лишь пять школ. Единственным городом в Литве, в котором число жителей увеличилось, является столица — Вильнюс. Кстати в Латвии число жителей уменьшилось даже в столице — Риге.

Еще несколько замечаний насчет «реформы» среднего образования. Начало было обнадеживающим. Еще во времена перестройки, т.е. в советское время, была принята новая концепция образования в Литве, направленная на развитие личности. Это стало важной основой для формирования новой системы образования в независимом государстве. В 1992 году, в независимой Литве основной целью образования стало становление самостоятельной и творческой личности, уже в школе раскрывающей свои способности. Таким образом акцентировалось развитие каждого школьника, учет его индивидуальных особенностей и возможностей. Школа должна была помочь как познать самого себя, так и развить навыки социального общения. Помочь не потонуть во все расширяющихся информационных потоках. Но эта цель потонула в мутных потоках либерализма. Впрочем, ученик определялся как «школьная корзинка», а учитель — как носитель услуг. Сколько «корзинок» соберет школа, столько и

получит средств. Кроме того, финансовое обеспечение школ министерство переложило на самоуправления. Основную часть средств «съедали» коммунальные услуги. Поэтому школам пришлось экономить и увеличивать число учеников в классах, а учителям выделять лишь доли штатной единицы. Учителям приходится метаться по нескольким школам. Таким образом, качество подготовки школьников ухудшалось. Так как оценка школы во многом определяется по результатам выпускных экзаменов, основной задачей школы становится не развитие самой личности, а результаты аттестата зрелости. Вирус либерализма значительно подточил миссию школы.

За первые десятилетия реформы образования значительные потери понесла система профтехобразования. Особенно это было наглядно в сельских районах, где были закрыты профтехучилища с направленностью сельского хозяйства. Потеря таких школ также была очень болезненна для этих населенных пунктов. Потеряли работу и многие преподаватели этих школ. Лишь теперь происходит некоторое возрождение системы профтехобразования, так как рабочую специальность все больше предпочитают даже выпускники вузов.

Несколько слов о попытках централизации высшего образования (Tisenkopfs 2011). Потребность централизации и сокращения числа вузов основывалось на требовании повышения качества подготовки студентов. Но пример гибридных объединений, какой произошел с классическим университетом Витаутаса Великого, когда к нему были фактически присоединены когда-то бывшая сельскохозяйственная академия и бывший когда-то Вильнюсский педагогический институт, создал множество дополнительных проблем и ничем не повысил качество подготовки. Клайпедский университет пока отстоял свой статус, а Шауляй теряет его, хотя их отдаленность от университетских центров Вильнюса и Каунаса определяют их значимость для территориального развития Литвы. Таким образом, по моему мнению, решения должны исходить из общей концепции всех звеньев системы образования и их значимости для государства.

Отдаленность Даугавпилса — второго по численности города в Латвии — от столицы Риги также определяет значимость Даугавпилсского университета для Латгалии (Meņšikovs 2002; Tisenkopfs 2011). Планы подчинения университета Резекненской академии технологий наглядный пример механистического «решения оптимизации» системы образования в Латвии.

Новые вызовы сегодняшнего противоречивого мира, пандемия коронавируса, набирающая скорость четвертая научно-техническая революция конечно будут требовать кардинальных изменений во всех сферах жизни и, в особенности, в сфере образования, но это должны быть именно научно обоснованные реформы, а не реализация корыстных интересов.

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### Izglītības iestāžu loma reģionālajai attīstībai

#### Kopsavilkums

Šajā rakstā autors piedāvā pārskatu par radikālajām izmaiņām Lietuvas izglītības sistēmā pēdējo 30 gadu laikā. Tiek atzīmēts, ka nepieciešamās izmaiņas izglītības saturā ne vienmēr tiek pavadītas ar racionālām un dzīves pieprasītam reformām. Arvien lielāku uztraukumu izsauc skolotāju un pasniedzēju prestiža kritums, deklaratīvi varas solījumi nodrošināt viņiem pienācīgu atalgojumu. Izglītības kvalitātes kritums, skolu likvidēšana mazapdzīvotās vietās un augstākās izglītības iestāžu statusa pazemināšanās negatīvi ietekmē iedzīvotāju dzīves kvalitāti un stimulē migrāciju. Autors uzskata, ka līdzīgas reģionālās attīstības problēmas ir raksturīgas arī citām Baltijas valstīm.

**Atslēgas vārdi:** izglītība, profesionālā apmācība, profesijas prestižs, augstākās izglītības centralizācija, reģiona attīstība.

## **ЦИФРОВАЯ ТРАНСФОРМАЦИЯ ОБРАЗОВАНИЯ В РЕСПУБЛИКЕ БЕЛАРУСЬ**

Цифровая трансформация предполагает преобразование системы образования, которое является фундаментом инновационной экономики, формируя ее кадровый потенциал, под влиянием передовых инновационных информационно-коммуникативных технологий (ИКТ). Цифровая трансформация образования Республики Беларусь необходима с целью обеспечения соответствия образовательного процесса потребностям рынка труда, повышения степени вовлеченности в данные процессы учреждений образования всех уровней и других организаций системы образования, а также ученых, руководителей и специалистов органов государственного управления, представителей частного сектора экономики.

**Цель.** Рассмотреть стратегию, задачи, направления и границы развития процесса цифровой трансформации системы образования в Беларуси, выявить управленческие и проблемы формирования кадрового состава, факторы, сдерживающие процессы цифровой трансформации высшего образования.

**Выводы.** В статье рассмотрены основные направления цифровой трансформации системы образования в Беларуси: цифровая трансформация образовательного процесса с целью формирования соответствующей инфраструктуры и преобразования управления в системе образования; цифровая трансформация процессов, сопутствующих образовательному процессу (внедрение дистанционного обучения, новых образовательных методик и практик, количество специальностей в сфере IT, новые образовательные стандарты «Университет 3+»); обновления образовательного процесса подготовки преподавателей, которое реализуется при подготовке педагогических кадров, переподготовке и повышении квалификации педагогических работников и других специалистов системы образования. Показаны особенности создания Республиканской информационно-образовательной среды.

**Ключевые слова:** цифровая трансформация, образование, Республика Беларусь, концепция.

Цифровую трансформацию образования в Республике Беларусь определяют, как коренную трансформацию образовательных процессов, а также системы управления им в учреждениях высшего образования на основе использования современных цифровых технологий (Государственная программа, 2016). Цифровая трансформация образования необходима с целью обеспечения соответствия образователь-

ного процесса потребностям рынка труда, повышения степени вовлеченности в данные процессы учреждений образования всех уровней и других организаций системы образования, а также ученых, руководителей и специалистов органов государственного управления, представителей частного сектора экономики.

В Беларуси о развитии процесса цифровой трансформации системы образования свидетельствует разработка и принятие общегосударственной Концепции цифровой трансформации образования, ряда других нормативно-правовых актов. Так, в «Концепции цифровой трансформации процессов в системе образования Республики Беларусь на 2019–2025 гг.» (Консерсiя 2019) определены основные цели, задачи, направления и границы цифровой трансформации процессов в системе образования. Концепция, образуя базу для осуществления цифровой трансформации, определяет 1) модернизацию инфраструктуры системы образования, 2) внедрение прорывных технологий в образовательный процесс (блокчейн, уберизация, наборы сенсоров, формирующие «умные учреждения», технологии больших данных, искусственный интеллект, технологии виртуальной и дополненной реальности), 3) оптимизацию и оцифровку с помощью программных средств всех процессов, протекающих в системе образования и реализуемых на основе принятия технических, программных, методических и нормативных решений.

В настоящее время в Республике Беларусь цифровая трансформация процессов в системе образования, предполагающая обновление содержания подготовки специалистов для различных отраслей реального сектора экономики и образовательного процесса подготовки преподавателей, осуществляется по двум основным направлениям.

Первое – Цифровая трансформация образовательного процесса с целью формирования соответствующей инфраструктуры в учреждениях образования и преобразования управления в системе образования.

Система образования в настоящее время включает более 9 тыс. учреждений образования различного уровня. По сравнению с 2011 г. в 2019–2020 учебном году, как видно по данным таблицы 1, количество вузов сократилось с 55 до 51 (в том числе государственных с 24 до 20), численность студентов на 42 % (с 445576 до 260909).

Республика Беларусь готова к цифровой трансформации образовательного процесса, поскольку в ней практически завершена инфор-

матизация. ИКТ используются в учреждениях образования всех типов и видов на всех уровнях основного, специального и дополнительного образования. Доступ к сети Интернет имеют 98% учреждений образования, в том числе в 91% учреждений доступ обеспечен по широкополосному каналу (Консерсја 2019). В том числе высшее образование относится к «цифровым лидерам» — отраслям экономики, наиболее интенсивно использующим информационно-коммуникационные технологии. Так, к 2016 г. среди организаций республики, реализующих программы высшего образования, 96,6% использовали электронную почту и имели локальные вычислительные сети, а 98,3% имели доступ к сети Интернет и собственный веб-сайт (Karpenko 2018).

Таблица 1.

**Система высшего образования Республики Беларусь**

	2011	2014	2015	2016	2017	2018	2019
Число учреждений высшего образования	55	54	52	51	51	51	51
Студентов, тыс. человек	445,6	362,9	336,4	313,2	284,3	268,1	260,9
Численность магистрантов, тыс. человек	7,6	8,9	10,2	11,8	14,9	14,7	11,9
Численность студентов и магистрантов на 10 000 человек населения, человек	425	392	365	342	315	298	288

**Источник:** *Obrazovanie v Respublike Belarus' 2019.*

Второе — Цифровая трансформация процессов, сопутствующих образовательному (внедрение дистанционного обучения, новых образовательных методик и практик, количество специальностей в сфере IT, новые образовательные стандарты «Университет 3+») (Консерсја 2019).

Развитие дистанционного обучения в Беларуси осуществляется путем объединения усилий учреждений высшего образования и ИТ-компаний через их интеграцию в ИТ-кластер — дистанционный сетевой университет. С этой целью на единой площадке будут размещены курсы онлайн-обучения и электронные учебно-методические комплексы, созданные преподавателями разных университетов и прошедшие экспертную проверку качества (Lis 2018).

Перспективными направлением развития высшего образования и совершенствования деятельности университетов в Республике Бела-



русь определены реализация модели развития «Университет 3.0» и переход к сетевой системе учреждений высшего образования через кластеризацию (формирование образовательных кластеров, объединяющих учреждения различных уровней образования) (University 5.0. 2020; Analiticheskij otchet). Это позволит осуществить переход к новой образовательной парадигме «Образование через всю жизнь».

Вместе с тем, в Республике Беларусь есть проблемы цифровой трансформации системы образования, которые прежде всего включают управленческие (недостаток компетенций в области цифровизации у руководящих работников, низкая скорость принятия решений) и проблемы формирования кадрового состава (недостаток компетенций в сфере цифровой трансформации у педагогических работников, а также студентов педагогических специальностей, сравнительно низкий уровень оплаты труда педагогов) (Lis 2019). Кроме того, недостаточно количество квалифицированных экспертов в области цифровой трансформации, которые могут взять на себя функцию оценки и продвижения реальных инновационных подходов, а также нехватку педагогических работников, способных в полной мере реализовывать направления цифровой трансформации процессов в системе образования.

Цифровая трансформация образования также реализуется в рамках такого направления как обновление образовательного процесса подготовки преподавателей а) при подготовке педагогических кадров, б) при переподготовке и повышении квалификации педагогических работников и других специалистов системы образования. Так, в условиях цифровой трансформации в подготовке педагогических кадров главным ориентиром становится сетевая, распределенная педагогическая деятельность. Для этого для педагога особую важность приобретает умение создания собственных моделей электронного обучения. Поэтому при подготовке кадров осуществляется переход от обучения возможностям существующих систем и технических средств к формированию проектировочных умений на основе нескольких моделей электронного обучения (Leading Countries of the World 2017).

Формированию новых моделей электронного обучения способствуют развитая ИКТ-инфраструктура для поддержки электронного обучения, усиление индивидуализации образования, повышение качества обучения за счет введения управляемой преподавателем самостоятельной работы студента, изменение структуры учебной, научно-

методической нагрузки профессорско-преподавательского состава (уменьшение аудиторных форм), организация самостоятельной работы студента на основе дистанционных образовательных технологий, возможность привлечения в онлайн-программы студентов из-за рубежа, повышение ресурсоэффективности педагогического образования через разработку MOOK (массовых образовательных онлайн курсов) (Zhuk, Minich 2019).

В тоже время процесс формирования новых моделей электронного обучения затруднен вследствие: отсутствия в перечне образовательных услуг в системе педагогического образования дистанционных и онлайн курсов; недостатка качественных учебных материалов для организации электронного обучения; отсутствия ясных параметров описания компетенций и образовательных результатов в учебных программах для организации управляемой самостоятельной работы на основе технологий электронного обучения; низкого качества тьюторского сопровождения обучающихся; недостаточного уровня ИКТ-компетенций студентов и ППС; недостатка прямого общения между студентами и преподавателями, большой зависимости от технологий; недостаточного применения электронного обучения при проведении педагогических практик, практических и лабораторных занятий (Консерсја 2019). Для ускорения цифровой трансформации процессов в системе образования целесообразно создание экспериментальных учреждений образования с максимально полным набором ИКТ-сервисов для детальной оценки их эффективности и последующего внедрения во все учреждения образования (Zhuk, Minich 2019).

Дополнительно к базовому образованию на базе профильных учреждений образования, а также в Республиканском институте высшего образования на постоянной основе осуществляется переподготовка и повышение квалификации руководящих работников и специалистов для успешной интеграции в процесс цифровой трансформации.

Вместе с тем, на ряду с проблемами действуют факторы, сдерживающие процессы цифровой трансформации высшего образования республики. К ним следует отнести недостатки статистического учета (публикуемые официальной статистикой показатели описывают исключительно процессы информатизации, но не цифровой трансформации), недостаточная степень интеграции баз и банков данных в системе образования и охвата ими всех сфер образовательной деятельности, недостаточное использование органами управления си-

стемы образования аналитических возможностей, предоставляемых передовыми информационными технологиями, ограниченное внедрение наиболее передовых технологий в образовательный процесс, отсутствие международных и национальных стандартов по вопросам использования ИКТ в образовании, недостаточная информированность педагогических работников о возможностях применения ИКТ в образовательном процессе, о вопросах информационной безопасности, в т. ч. при работе в сети Интернет, недостаточное рассмотрение в научной литературе процессов цифровой трансформации высшего образования с точки зрения экономической эффективности (Bogush 2018). Кроме того, необходимо расширение государственно-частного партнерства с участием производителей и поставщиков передовых ИКТ, имеющих перспективы применения в образовательном процессе в учреждениях высшего образования.

Особое значение в ходе цифровой трансформации процессов в системе образования отведено проекту создания Республиканской информационно-образовательной среды (РИОС). Основной целью создания РИОС является обеспечение эффективной информационной поддержки процесса управления системой образования, а также внедрение современных ИКТ в процесс обучения (Lis, Problemy transformacii 2018). РИОС включает в себя четыре основных цифровых профиля: для обучающегося, педагогического работника, учреждения образования, органа управления образованием. В результате будет сформирован проект «Электронное образование», включающий «Электронный детский сад», «Электронная школа», «Электронный колледж», «Цифровой университет», «Цифровой отдел (управление) по образованию».

Ближайшая перспектива трансформации процессов в сфере образования включает формирование систем мониторинга обеспечения образовательного процесса, модернизацию систем статистики, внедрение аналитики с использованием искусственного интеллекта, расширение безбумажного документооборота, создание единого корпоративного почтового сервиса, распространение электронных платежей и развитие дистанционного обучения. Данные процедуры будут интегрированы в РИОС. Таким образом, РИОС явится одним из элементов электронного правительства Беларуси (Lis 2019; Lis, Problemy transformacii 2018). В связи с этим РИОС является индикатором готовности системы образования к цифровой трансформации. В перс-

пективе реализация Концепции цифровой трансформации системы образования в Республике Беларусь позволит достичь определенных результатов для государства, системы образования, педагогических работников, обучающихся.

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## **Digital transformation of education in the Republic of Belarus**

### **Summary**

Digital transformation involves the transformation of the education system, that is the foundation of an innovative economy and forms its human potential under the influence of advanced information and communication technologies (ICT). The digital transformation of education in the Republic of Belarus is necessary to ensure the compliance of the educational process with the needs of the labor market, to increase the involvement of educational institutions of all levels in these processes, as well as scientists, managers and specialists of public and private sectors of the economy. The purpose of the research is to consider the strategy, objectives, directions and limits of the process of digital transformation of the educational system in Belarus, to identify managerial and staff problems, factors constraining the digital transformation of higher education in the country.

Conclusions. The article discusses the main directions of digital transformation of the educational system in Belarus, including: digital transformation of the educational process with the aim of forming an appropriate infrastructure and transforming the management system in the educational sphere; digital transformation of the processes accompanying the educational process (introduction of distance learning, new educational methods and practices, development of IT specialties, implantation of new educational standards “University 3+”); digital transformation of with the aim of updating the process of teachers training. The features of the creation of the Republican information and educational environment are shown.

**Key words:** digital transformation, education, Belarus, concept.

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