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Adrese / Address

Daugavpils Universitātes Humanitāro un sociālo zinātņu institūts,
Parādes 1, Daugavpils, LV-5400, Latvija.

Tālrunis (+371)65422163

E-pasts viktorija.sipilova@du.lv

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RAKSTI

SOCIOLOĢIJA

Andrius Segalovicus

MEASURING CONSUMERISM: ATTITUDES TOWARD HOUSING OF LITHUANIAN LARGEST CITIES INHABITANTS

The paper reveals attitudes of Lithuanian largest cities inhabitants towards housing with respect to consumerism expression. Consumerism is understood as a human desire, intention, and willingness to consume. In the case of consumerism – desire and intention to consume is of crucial importance, because it is based on an assumption that not an actual consumption power and actual consumption in general but an orientation towards consumption constitutes consumerism. Thus all men have a certain degree of consumerism (as consumer culture prevails in modern societies) but humans differ in the intensity / strength of consumerism expression. The expression of consumerism is taken as an analytical instrument to deal with the attitudes towards housing. Consumerism operationalization is based on consumer culture features – materialistic values, symbolism, commodification, power to consume, well-being and good life. The survey carried out in 2011 and repeated in 2016 brings us an empirical evidence that the attitudes towards housing differ with respect to the expression of consumerism. The fact that features of consumer culture exist in Lithuania enables us to make an assumption that consumerism is recognized in other social contexts in Lithuania.

Key words: consumerism, consumption, housing.

Patērneciskuma novērtēšana: Lietuvas lielāko pilsētu iedzīvotāju attieksme pret mājokli

Raksts atklāj Lietuvas lielāko pilsētu iedzīvotāju attieksmi pret mājokli saistībā ar patērneciskuma izpausmēm. Patērneciskumu saprot kā cilvēku vēlmi, nodomu un gatavību patērēt. Attiecībā uz patērneciskumu, izšķirošā nozīme ir vēlmei un nodomam patērēt, jo tā pamatā ir pieņēmums, ka nevis faktiskā patēriņa jauda un faktiskais patēriņš kopumā, bet gan orientācija uz patēriņu rada patērneciskumu. Tādējādi katram cilvēkam ir zināms patērneciskuma līmenis (jo mūsdienu sabiedrībā dominē patērētāju kultūra), bet cilvēki atšķiras pēc patērneciskuma izpausmes intensitātes / stipruma. Patērneciskuma izpausme tiek izmantota kā analītiskais instruments, lai pētītu attieksmi pret mājokli. Patērneciskuma operacionālizācija balstās uz patērētāju kultūras iezīmēm – materiālistiskām vērtībām, simbolismu, komfortu, spēju patērēt, labklājību un labu dzīvi. 2011. gadā veikta aptauja, kas tika atkārtota 2016. gadā, sniedz mums empīriskus pierādījumus tam, ka attieksme pret mājokļiem atšķiras atkarībā no patēr-

nieciskuma izpausmes. Fakts, ka Lietuvā pastāv patērētāju kultūras īpatnības, ļauj mums izdarīt pieņēmumu, ka patērnieciskums Lietuvā tiek atzīts citos sociālos apstākļos.

Atslēgas vārdi: patērnieciskums, patēriņš, mājoklis.

Измерение консьюмеризма: отношение жителей крупнейших городов Литвы к жилью

Статья демонстрирует отношение жителей крупнейших городов Литвы к жилью в зависимости от проявления консьюмеризма. Консьюмеризм понимается как желание, намерение и готовность человека потреблять. В случае консьюмеризма – желание и намерение потреблять имеет решающее значение; это явствует из предположения, что именно ориентация на потребление (а не фактический объем потребления или фактическое потребление в целом) является основой консьюмеризма. Таким образом, определенная степень консьюмеризма свойственна всем людям (поскольку потребительская культура преобладает в современных обществах); тем не менее все люди различаются интенсивностью/силой проявления консьюмеризма. Проявление консьюмеризма является аналитическим инструментом для рассмотрения того, как люди относятся к жилью. Операционализм консьюмеризма основан на особенностях потребительской культуры – материалистических ценностях, символизме, товарности, возможности потреблять, благополучии и хорошей жизни. Опрос, проведенный в 2011 году и повторенный в 2016 году, дает нам эмпирические данные о том, что отношение к жилью отличается в зависимости от проявления консьюмеризма. Тот факт, что особенности потребительской культуры существуют в Литве, позволяет нам предположить, что консьюмеризм проявляется в других социальных контекстах Литвы.

Ключевые слова: консьюмеризм, потребление, жилье.

Introduction

The study is based on the analysis of concepts of consumption, consumer culture and consumerism. Consumption is understood as the deliberate action of an entity associated with the category of benefit (Bocock 2001). Consumption is a routine, day-to-day practice when individuals meet their needs. In principle, consumption is a fragment of the economic activity associated with the production process – consumer objects are the result of production, and therefore the consumption process responds to market demand – supply logic. The specifics of consumer culture are that not only consumer objects are the result of production, but consumption itself is produced (Galbraith 1963; Baudrillard 1998). In the consumer culture, the objects of consumption and the practice of consumption become the structuring principles of individuals (Featherstone 2007; Bauman 2001), which are characterized by symbolism, asymmetric power relations, and commodification. Symbolism is understood as a value of the consumption object; the symbolic value in consumer culture often marginalizes the functional value of the object of use, and therefore the object of consumption becomes symbols associated with certain objects (Baudrillard 2000; 2002). Symbolism itself in turn implies a subject capable of recognizing and behaving accordingly in relation to the symbolic value of an object. Consumerism is understood as the moral values inherent in consumer culture – an ideology that supports, promotes, grows and is oriented towards consumer practice (Thompson 1990; Campbell 1983). It is

important to notice that not all individuals give up and pass through consumerism in the same way, therefore, the research formulates the concept of intensity of expression of consumerism, expressing the degree of consumerism. In this way, individuals can be categorized according to the degree of expression of consumerism. Moreover, research is based on the assumption that the different intensity of expression of the consumer determines different approaches to the same object. The research examines the attitude towards housing, although the consumer object can be anything – a mobile phone, car, clothes, even marriage or higher education – in all cases the assumption should be valid, that is, subjects should, depending on their degree of consumerism, have different treatment of the same consumption objects.

In general the concept of consumerism in research methodologically is used as the theoretical basis for empirical research or as a speculative theoretical construct, which is based on the analysis of today's Western culture. In both cases, the theoretical-speculative aspect of consumerism dominates. Empirical studies of consumerism are lacking (both in Lithuania and abroad), although the concepts of consumer culture, consumerism or consumer society have undoubtedly become part of the discourse of social sciences. The sociology discipline investigates social processes, explains change, analyzes the causes – reflects reality on the theoretical level, and investigates it empirically. In the case of consumerism, the theoretical reflection is more than sufficient, but empirical research is not large, and the existing one is fragmented, because it analyzes separate aspects of consumerism (designation of identity, expression of materialism, demonstration use, etc.). The lack of empirical research and fragmentation can be explained by the fact that, that consumerism is a multidimensional object of research, which makes it difficult to operationalize it, it is not easy to find a methodological solution for adequate and theoretical concepts and for the whole field of the empirical research. Present study is an attempt to create an empirical research model for consumerism.

Methodology

Consumerism is in itself a speculative construct, but when a consumer object occurs, the premise of exploring the expression of consumerism by analyzing the consumer's attitude towards the object of consumption is found. The research analyzes the approach to housing (as an object of consumption) for a number of reasons. As a consumer object, housing is methodologically distinguished by the fact that it includes a broad field of analytics (Mallet 2004). Housing as an object of consumer research is relevant in the context of Lithuania, as empirical research is lacking, although the changes related to the development of own housing in the major cities of Lithuania are obvious.

The research methodology is based on the concept of housing as an object of consumption and the concept of consumerism. Housing as an object of consumption is revealed by analysing the value of the object (Halbrook 1999). The content of consumerism as an object of empirical research reveals the characteristics of consumer culture (Featherstone 2007; Rojek 2004; Rubavicius 2003; 2010). The essence of the

research is the analysis of the inhabitants' attitude to housing depending on the expression of consumerism, therefore the main methodological assumption of the empirical research is formulated as follows: **the attitude of the population towards housing differs depending on the expression of consumerism**. The methodological premise of the survey obligates to explain how the approach to housing is being investigated and how consumerism is operationalized. The methodological part contains the following tasks:

- Conceptualize housing as an object of consumption
- Identify significant features of housing for the study
- Operationalize consumerism
- Construct an empirical research model for consumerism.

As a consumer object, housing is conceptualized based on the concept of the value of the object of consumption. Any object becomes a consumer object due to its value, and therefore it is important to determine what constitutes the value of the dwelling as an object of consumption. On the basis of the analysis of relevant research (Gram-Hanssen and Bech-Danielsen 2004; Jones, Elsinga, Quilgars and Toussaint 2007; Ronald 2008a; 2008b; Rowlands and Gurney 2001; Toussaint and Elsinga 2009) three aspects of the housing value significant – functional, investment and symbolic – are distinguished. Consumerism is operationalized on the basis of materialism (Richins and Dawson 1992; Dittmar and Halliwell 2008), symbolism – including status and style (Baudrillard 2000; 2002; Cernevičiute 2006; Jenkins 2008), consumer power (Bauman 2007; 2011), commodification (Slater and Tionkiss 2004) and good life / well-being (Galbraith 1963; Dittmar and Halliwell 2008) categories. In the broadest sense, consumerism is understood as the desire to consume, but not the actual power of consumption. The study is based on the assumption that consumerism is common to all individuals, but the intensity of its expression differs. Consumerism Expression Intensity (CEI) is an analytical tool for research – respondents are divided into three groups according to the intensity of expression and analyzed the attitudes of different groups to the object of use – housing.

The consumer expression test model is based on functional, investment and symbolic values that reflect the characteristics of the home and consumerism. The model is based on the research methodological assumption: residents' attitude to housing varies according to the intensity of consumer expression. The hypothesis of empirical research is based on the logic of the methodological assumption: the attitude of different groups of intensity of consumption of consumerism to the functional, investment and symbolic value of the housing is different.

Results. Findings

The inhabitants of Vilnius, Kaunas, Klaipėda, Šiauliai and Panevezys from 17 to 73 years of age were surveyed. Two surveys were conducted using the same questionnaire – in 2011 (563 respondents), repeated in 2016 (524 respondents). The survey was conducted by Synopticom UAB using Synopanel's electronic survey platform in such a way that respondents' age and gender characteristics corresponded to the

structure of the population of largest cities in accordance with the socio-demographic features mentioned above. The survey sample is not representative, though sufficient to reflect trends in the attitude of residents of largest cities in Lithuania.

The questionnaire uses a 5-point Likert scale. Respondents' answers to Consumerism construct questions (number of items 22) are summarized, the results are divided into quartiles, where the lower quartile means low expression of consumerism, upper – high, and the data between the upper and lower quartiles indicate the average expression of consumerism. In this way, the study distinguishes three groups of respondents according to consumerism expression intensity (CEI). The CEI data analysis is used as an analytical tool, a criterion that determines the differences in attitude toward housing.

The study of the functional value of the dwelling revealed that the population is essentially satisfied with their current housing, functional features of the place of residence – security, privacy, spaciousness, suitability for living with the family – essentially satisfy the needs of the population. The study did not distinguish between different groups of consumer intensity groups: there was no definition of consumerism in relation to housing functional properties. The survey found that more than half of the population would like to replace the current housing with another one. Bearing in mind that almost 60% of the inhabitants indicate that they are basically satisfied with the current housing, the desire to change housing is interpreted by the expression of consumerism: residents whose consumerism is more intense, are more likely to change housing than residents whose consumerism is less intense. The results of the research on the attitude towards the function of the housing substantiate the concept of consumerism that the user satisfaction is not as much as the satisfaction of the needs (associated with the functional / instrumental properties of the object), but the desire or desire to use it. This conclusion is supported by the category of materialist ethics of consumerism – the desire to consume, the desire to change owned things with new ones, regardless of the practical functions of consumer objects – these are the characteristics of consumerism ethics that have been observed in the analysis of the population's attitude to housing. The fact that the functional properties of a consumer object are equally important for all residents irrespective of their intensity of consumerism expression is not less important. In the consumer culture research, the symbolic value of an object of use prevails, functional / instrumental aspects of value are not studied at all. The results of present research prove that the instrumental value aspects are marginalized unreasonably – they are important for most respondents, therefore ignoring them in the field of consumer research is incorrect.

An analysis of the investment value of housing includes analysis of the approach to renting a home, the approach to home loans and the approach to housing as an investment. Findings of the survey indicate that the main advantage of renting housing, in the opinion of the population, is the ability to easily change the place of residence; the biggest shortage of rent – rented residential housing is not regarded as a “real house”. The survey found that during the investigation period, the residents' attitude to housing rent has changed – positive assessments have decreased. An analysis of rental and property appraisals by consumerism expression groups has shown that ratings are different – the higher the CEI, the more favorable the assessment of property

and rental less favorable; The group of high CEI tends to associate the rent with an inferiority, people who are satisfied with the rental of housing, the group of high CEI tends to describe negatively. The significance of research is that the approach to renting a dwelling is based on the expression of consumerism, as the ratings of high and low CEI groups differ. The results of the empirical research are consistent with the conceptual model of consumerism, since consumerism is associated with ownership, i.e. the ownership of the dwelling, and even more so – those who do not attribute ownership, are evaluated negatively. On the other hand, it should be borne in mind that residential housing rent is not equated with a home – a category that is significant for most people, and therefore there is reason to believe that negative estimates of rental housing are at least partly related to the category of home that is significant for everyone, regardless of the consumerism expression intensity.

The study found that by almost 40% of the population is convinced that a mortgage loan to them is the only way to have a home. During the survey period, significant changes in the population's attitude towards mortgage loans were recorded: the number of residents who believe that taking a bank loan is a matter of course is increasing; a decrease in the share of the population, which is reflected in the negative consequences of borrowing for housing; the number of inhabitants who believe that the image of their own housing and well-being of advertising is realistically accessible to them is increased. These changes indicate that the population's attitude to home loans is becoming more favorable and the loan becomes a standard tool for consumption – the skepticism about this instrument is decreasing among the population. The study found differences between different groups of CEI: residents whose CEI highs tend to think that a mortgage loan is the only way for them to have a home and to judge the loan as a matter of course; a group of high CEI is more likely to associate mortgage loans with demonstrative consumption patterns. It is important to mention that one of the most significant ideologems of consumerism – the image of well-being and the good life – is recognizable among the inhabitants of the major cities of Lithuania, the research data confirm that this image is not illusory – a positive change was observed during the research period, as half of the population believes that the life represented in advertising is not a mere fiction, but is really achievable for them.

The analysis of consumption power has shown significant differences between CEI groups: a high CEI is more likely than one group of low CEI to consider working primarily for ability to consume; high CEI group tend to support a belief that it is unreasonable to refuse a loan if it is easily available. Even more importantly, a group of high CEI tends to assess the individual's ability to borrow for housing as a criterion for social stratification – individuals who cannot afford housing (due to limited financial power) are negatively valued. The positive attitude of the high CEI population towards mortgage loans confirms the importance of consumption power in the context of consumer culture, which is consistent with the importance of consumer empowerment identified in the concept of consumerism. Empirical data makes it possible to reasonably claim that housing among residents of largest cities of Lithuania is understood as an investment object. The data confirmed the research hypothesis that the investment value of a home is more significant for a group of high CEI than for a low CEI group,

which empirically justifies the inclusion of the category of commodification found in the concept of consumerism.

The results of the symbolic value of the housing analysis confirmed the concept of housing as a symbolic value object. There is a significant difference in approaches between CEI groups: the symbolic value of a place of residence is more likely to be highlighted by residents with high consumerism than those with low consumerism. The results of the research justify the category of the symbolism found in the concept of consumerism, where social status and lifestyle in general are associated with objects of consumption.

The results of the analysis of the research data prove that the developed model of the consumerism test in the research was applied correctly. The operationalization of the concept of consumerism based on the categories of materialism, symbolism, consumption power, image of the good life and well-being is adequate to the field of empirical research, since all categories of consumerism are recognizable by the population. The same empirical data show the adequacy of the theoretical concept of consumerism to the empirical research model. The Consumer Expression survey has based consumerism as a gradual category, which means that the premise of the study – consumerism is common to all individuals, but is manifested in different intensities – proved to be true. The intensity of consumerism expression is a criterion for determining the population's consumerism groups, empirical data has proved that the assessments of different CEI groups are related to the point of view on the object of consumption – housing – differ. The results prove that in Lithuania there are notable features of consumer culture related to material values, commodification, symbolism, consumption power and categories of the good life and well-being. Significant is the fact that the expression of consumerism features in Lithuania has been established, which justifies the assumption that the expression of consumerism can be empirically investigated in other contexts, while choosing other objects of consumption.

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Lilija Kublickienė, Alina Žvinklienė

INSTITUTIONALIZATION OF GENDER EQUALITY POLITICS AND CURRENT GENDER GAPS IN THE BALTIC STATES¹

The common reference to the Baltic States as a single geopolitical entity conceals the actual differences between Estonia, Latvia and Lithuania. The article aims to outline the principal similarities and differences between Estonia, Latvia and Lithuania in the field of gender equality politics developed within gender mainstreaming approach in attempt to better understanding of the current gender gaps in these countries. The research focuses on how national gender equality machineries were (re)constructed in accordance with international commitments to the UN and the EU after the restoration of independence in the Baltic States. It is demonstrated that differences between the Baltic States in the institutionalization of the contemporary structure of gender equality machinery were overcome once they became EU members. The current outcomes of gender equality politics are described on the basis of the Global Gender Gap Report 2017. The empirical data are provided for three Baltic States by analysing their gender gaps in four spheres – Economic participation and opportunity, Education attainment, Political empowerment and Health and survival. According to the Global Gender Gap Index, the Baltic States are among the EU Member States with the average / slightly above-average gender equality. The article argues that confirmation of the institutionalization of the contemporary gender equality machinery, the content of national governmental activities and the predominant relationship model with civil society in the Baltic States indicate that gender mainstreaming is likely yet another and the most recent social policy tool for the management of human resources. Thus, Latvia usually demonstrates a minimal attachment to gender mainstreaming. Moreover, Latvia has regressed somewhat in this respect in 2013. However, current Latvia can be considered as having more equality than Lithuania and Estonia. Among all countries participated in the research in 2017, Latvia ranks 10th, Lithuania, accordingly, 12th, and Estonia, accordingly, 16th. The case of Latvia leveraging the rank up due to positive trends in closing gender gaps in both Economic Participation and Opportunity and Political Empowerment subindexes confirms an assumption that rather social changes related to national demographical and economic development than merely technocratic sophistication of gender equality politics has a profound impact on current statistical indexes related to gender equality.

Key words: gender equality, gender mainstreaming, gender equality machinery, gender gap.

Gendera vienlīdzības institucionalizācija un mūsdienu sieviešu un vīriešu vienlīdzības stāvoklis Baltijas valstīs

Kopējā atsauce uz Baltijas valstīm, kā vienotu ģeopolitisku vienību, slēpj faktiskās atšķirības starp Igauniju, Latviju un Lietuvu. Raksta mērķis ir izklāstīt galvenās kopīgās un atšķirīgās iezīmes starp Igauniju, Latviju un Lietuvu dzimumu līdztiesības politikas jomā, kas izstrādāta dzimumu līdztiesības aspekta pieejas ietvaros, lai labāk izprastu pašreizējās dzimumu atšķirības šajās valstīs. Galvenā uzmanība pētījumā tiek pievērsta tam, kā izmainījās valsts dzimumu līdztiesības mehānismi Baltijas valstīs saskaņā ar starptautiskajām saistībām pret ANO un ES pēc neatkarības atgūšanas. Ir pierādīts, ka atšķirības starp Baltijas valstīm dzimumu līdztiesības mehānismu mūsdienu struktūras institucionalizācijā tika pārvarētas, kad tās kļuva par ES

dalībvalstīm. Pašreizējie dzimumu līdztiesības politikas rezultāti ir aprakstīti, pamatojoties uz “Globālo ziņojumu par dzimumu līdztiesības problēmu 2017. gadā”. Empīriskie dati tiek sniegti trim Baltijas valstīm, analizējot to atšķirības starp dzimumiem četrās jomās – ekonomiskā līdzdalība un iespējas, izglītība, politiskā ietekme, veselība un izdzīvošana. Saskaņā ar Global Gender Gap Index, Baltijas valstis dzimumu līdztiesības jomā atbilst vidējam līmenim starp ES dalībvalstīm. Balstoties uz rezultātu analīzi, var pieņemt, ka mūsdienu dzimumu līdztiesības mehānisma institucionalizēšanas apstiprināšana, nacionālo valsts programmu saturs un dominējošais attiecību modelis ar pilsonisko sabiedrību Baltijas valstīs liecina, ka dzimuma līdztiesības problemātikas uzskaitē visdrīzāk ir viens no sociālās politikas instrumentiem cilvēkresursu vadībā. Latvija parasti parāda minimālu uzmanību dzimumu problemātikas uzskaites institūtu attīstībā, turklāt 2013. gadā pat tika novērots regress šajā jomā. Tomēr 2017. gada rādītāji parāda, ka Latviju var uzskatīt par vienlīdzīgāku nekā Lietuvu un Igauniju. Starp visām valstīm, kas piedalījās pētījumā 2017. gadā, Latvija ieņem 10. vietu, attiecīgi Lietuva 12. un Igaunija – 16. vietu. Latvijas reitings paaugstinājās sakarā ar pozitīvām tendencēm dzimumu atšķirību novēršanā gan ekonomiskās līdzdalības un iespēju, gan politisko tiesību palielināšanas apakšindeksos, kas apstiprina pieņēmumu, ka sociālās izmaiņas, kas saistītas ar nacionālo, demogrāfisko un ekonomisko attīstību, nozīmīgāk ietekmē ar dzimuma līdztiesību saistītos statistikas rādītājus, nekā vienkārši tehnikas dzimumu līdztiesības politikas pilnveidošana.

Atslēgas vārdi: gendera vienlīdzība, gendera problemātikas novērtējums, gendera vienlīdzības mehānismi, gendera pārrāvums.

Институционализация гендерного равенства и современное состояние равенства мужчин и женщин в странах Балтии

Объединение Эстонии, Латвии и Литвы в единый геополитический субъект: страны Балтии, как правило, скрывает фактические различия между ними. В целях лучшего понимания гендерных разрывов в Эстонии, Латвии и Литве, в статье обсуждаются основные сходства и различия в национальной политике гендерного равенства этих стран, которая разработана в рамках общего подхода к учету гендерной проблематики. Основное внимание исследования направлено на процесс создания национальных механизмов гендерного равенства в соответствии с международными обязательствами перед ООН и ЕС после восстановления независимости в Эстонии, Латвии и Литве. В статье показано, что в контексте вступления в ЕС, страны Балтии выразили различный уровень энтузиазма по поводу (вос)создания национальных механизмов обеспечения гендерного равенства. Однако различия между Эстонией, Латвией и Литвой в институционализации современной структуры механизмов, обеспечивающих гендерное равенство были преодолены вскоре после того, как они стали членами ЕС. Текущие результаты политики в области гендерного равенства описаны на основе показателей «Глобального доклада о гендерном разрыве – 2017». Согласно обобщенному индексу *гендерного разрыва*, равенство между женщинами и мужчинами в странах Балтии соответствует среднему уровню в ЕС. На основе анализа данных предполагается, что подтверждение институционализации современного механизма гендерного равенства, содержание национальных государственных программ и преобладание модели отношений с гражданским обществом в странах Балтии, скорее всего, свидетельствуют о том, что учет гендерной проблематики является еще одним инструментом социальной политики управления людскими ресурсами. Так, Латвия обычно демонстрирует минимальное внимание к развитию институтов учета гендерной проблематики, и даже некоторый регресс в 2013 году. Однако Латвия может считаться более равноправной, чем Литва и Эстония в 2017 году. Среди всех стран, участвовавших в ис-

следованиях, Латвия занимает 10-е место, соответственно Литва, 12-е и Эстония, соответственно, 16-е место. Латвия подняла свой рейтинг в связи с позитивными тенденциями в устранении гендерных разрывов в суб-индексах экономического участия и возможностей, и политических прав. Это предполагает, что скорее социальные изменения, связанные с национальным демографическим и экономическим развитием, чем просто технократическое совершенствование политики равенства, оказывает влияние на текущие статистические показатели, связанные с гендерным равенством.

Ключевые слова: гендерное равенство, учёт гендерной проблематики, механизм гендерного равенства, гендерный разрыв.

Introduction

Gender equality is transformed into one of the fundamental values of the European Union (founded in 1957) by the Treaty of Lisbon of 2007 (EU treaties).

The notion of gender equality politics usually refers to the theory and practice of the influence on elimination of the disparities between genders, i.e. so-called gender gaps in society. Gender equality politics as an integral sign of democratization of societies.

Contemporary gender equality politics in the Baltic States are developed within the frame imposed by European integration and known as a gender mainstreaming approach. The gender mainstreaming refers to the principle of taking a systematic account of the differences between the conditions, situations and needs of women and men in all public policies and actions (EC 1996).

The main postulates of a new institutionalism approach, for instance, new institutions are created or adopted using existing templates, social causations ‘path dependent’, and institutions affect the actors’ construction of identities, self-images and preferences, thus also their behaviour (Hall, Taylor 1996; Powell 2007) are useful for policy research. In case of gender equality, there is a clear relationship between both the Soviet Union or European Union initiatives and the construction of gender equality politics in the Baltic States. The Soviet gender equality policy was formulated on the basis of the approach known as the question of women (*zhenskiy vopros – женский-вопрос*). Historically, the solution of the woman question lies in advancement towards equality and implies the creation of conditions for social changes defined in terms of women’s emancipation or liberation (The Great Soviet Encyclopaedia 1979). It is argued that in the Baltic States, since 1990/91, innovations in gender equality politics are related rather to reformulation of the concept of gender equality and leading approaches than to the institutional machinery of gender equality policy (Žvinklienė 2016).

Undoubtedly, the Soviet legacy in gender equality issues should be traced as in the official (normative) policy documents and in activities of the institutions responsible for implementation of gender equality as in current actual behaviour of population in the Baltic States. Moreover, the Soviet legacy may be politically employed as either a brake or a buster for development of national gender equality politics.

The research aimed to demonstrate how national gender equality politics were (re)constructed in accordance with international commitments to the UN and the EU

after the restoration of independence in the Baltic States and, consequently, how it affected the current actual state of gender equality in Estonia, Latvia and Lithuania.

From nowadays point of view, the topic of the research can be considered as the employment of an historical comparative perspective which has a little to do with the present of gender equality. The main methodological reason for this choice is a shared postulate of the new institutionalism approach that the present is path dependent.

An empirical framework includes a documentary analysis of available official documents related to the gender equality politics, the analysis of secondary sources, and quantitative data from the *Global Gender Gap Report 2017*.

The construction of contemporary gender equality machinery in the Baltic States

Contemporary gender equality politics in post-communist countries are usually discussed in the context of gender mainstreaming approach and the international commitments to the United Nations (UN) and the European Union (EU).

In the Baltic States, the first internationally confirmed commitment in the field of gender equality was the (re) ratification of the UN Convention on the Elimination of All Forms of Discrimination against Women (CEDAW1979), which the Soviet Union ratified in 1981 on behalf of its member republics; it was ratified by the independent Estonia in 1991, Latvia in 1992 and Lithuania in 1994.

In 1995, the Baltic States were among the 189 UN member States that unanimously adopted the Beijing Platform for Action (BPFA) to improve the situation of all women without exception (BPFA 1995). Set out in the BPFA, the concept of gender mainstreaming as a strategy to promote gender equality entered European politics in 1991; however, 1995 became the key year for its adoption by the EU (Pollack, Hafner-Burton 2000).

Implementation of gender mainstreaming implied the (re)construction of the relevant gender equality machinery. In the BPFA document, the national machinery for the advancement of women is seen “as the central policy-coordinating unit inside government. Its main task is to support government-wide mainstreaming of a gender-equality perspective in all policy areas” (BPFA 1995). National machineries dealing with gender issues, oftenknown as gender equality machineries, vary in terms of structures, positioning and location within the overall government.

The ombudsman is seen as an independent institutional mechanism within the gender equality machinery's structure whose purpose is the non-judicial conflict resolution of possible (gender) discrimination. Ombudsman institutions, or institutions with similar responsibilities mandated to deal with discrimination issues, are commonly called equality bodies.

In 1995, the Baltic States applied for EU membership². The application for EU membership implied a national commitment to adopt and implement the European *acquis communautaire* (*acquis*) and to follow the guidelines of the European policy documents³.

Thus, 1995 marks a starting point for the formal re-addressing of national gender equality politics based on an approach to woman mainstreaming that at the time was usually defined in terms of the advancement of women (the woman question) to gender mainstreaming in accordance with international commitments to both the UN and the EU.

In the Baltic States the gender equality machinery comprises legal, parliamentary, governmental, inter- (a mechanism for social dialog), non-governmental levels, and ombudsman institution.

The Legal level

Legally, there is no discontinuity in the state's commitment to gender equality in the Baltic States after the restoration of their independence in 1990/91. The Soviet Constitution lost its effect, but gender equality de jure was secured by the relevant articles present in the reinstated national pre-war constitutions and the new constitutions of Estonia (Estonia's Constitution 1992, article 12), Lithuania (Constitution of the Republic of Lithuania 1992, article 29), and Latvia (Constitution of the Republic of Latvia 1992, article 91) kept its former one.

Estonia often stressed during accession that it was committed to the implementation of gender equality in the field of social policy prior to joining the EU and even before the legal basis for installing administrative units to deal with the task was in place. However, the *Gender Equality Act* (GEA) was formally adopted for the utilitarian purpose of facilitating EU accession, coming into effect on May 1, 2004 (Kuhl 2008; Põldsaar 2008; Sepper, Linntam 2005).

Gender equality is defined as a relatively new concept in Latvia, but the comparably high proportion of working women and a strong tradition of reconciling work and family life are cited as a positive legacy of the Soviet regime (Rastrigina 2015). Latvia did not adopt a specific gender equality law and it seems unlikely it will do so. Documents produced during accession by the Ministry of Welfare such as *The Gender Equality Initiative* (2001) and *Equal Opportunities for Everybody in Latvia* (2001) have remained at the draft stage. Latvia limited its legal commitment to gender equality policy to the *Labour Law* and the *Labour Protection Law* (2002), both of which incorporate the relevant European directives and contain the norms promoting gender equality (Gunda Werner Institute 2012).

Lithuania adopted two anti-discrimination laws: the Law on Equal Opportunities for Women and Men (1998) and the Law on Equal Treatment (2003). All current and future European directives on equal opportunities and treatment are incorporated into these laws and are implemented under the supervision of the Ombudsman for Equal Opportunities.

After joining the EU in 2004, the content of the legal level of (gender) the equality machinery was developed due to the *acquis* and national preferences, i.e. gender as a separate ground of discrimination gradually merged into the broadening set of legally protected grounds of discrimination. In 2004, however, only Lithuania among the Baltic States signed and ratified the Optional Protocol to the Convention on the Elimination of All Forms of Discrimination against Women (CEDAW 1999), which

establishes procedures for submitting individual and collective claims of infringement of rights protected under the Convention.

Parliamentary and Governmental Levels

Formally, equality issues are incorporated in the activities of various parliamentary committees and commissions dealing with human rights and social affairs. However, there are attempts to establish a specific parliamentary institution dealing with gender equality. In Estonia, a draft resolution on the formation of a parliamentary study committee to analyse gender equality was initiated in 2015; in Latvia, the Parliamentary Subcommittee on Gender Equality was established in 2003; in Lithuania, the Women's Parliamentary Group initially dealing with the promotion of the equal opportunities law was created in 1996.

The (re)involvement of governmental administrative bodies in the formation, development and implementation of contemporary gender equality politics was initiated by the action plans adopted by national governments and allocated to the ministries dealing with social security matters. In Estonia, measures promoting equality between women and men had been included in the government's action plan and national program for the adoption of the *acquis* since 1998; in Latvia, *The Statement on Gender Equality Implementation*, which was the first strategic document used as the foundation for the development of action plans and documents implementing the goals of the current gender equality policy, was produced in 2001; in Lithuania, the *Action Plan for the Advancement of Women* was adopted by the Lithuanian government already in 1996.

The key institutions for the management of gender equality politics are the national ministries responsible for social security matters and the newly created focal points within their structures: in Estonia, the Gender Equality Bureau in the Ministry of Social Affairs was established in 1998, in Latvia, the Gender Equality Unit within the Department of European and Legal Affairs at the Ministry of Welfare was created in 2003, and in Lithuania, the Labour Market and Equal Opportunities Division at the Ministry of Social Security and Labour dates from 2001.

Such (occasional) institution as the State Councillor (Advisor) on Women's Issues to the Prime Minister was realized only in Lithuania in 1994.

Inter-level

The mechanism for social dialog between governmental and civil society organizations, i.e. the coordinating and consultative bodies for the initial adoption of the Beijing Platform for Action (BPFA's) commitments, are: in Estonia, the Inter-Ministerial Working Group on Women's and Equal Opportunities Policies created in 1996; in Latvia, the Gender Equality Council charged with ensuring the implementation of gender equality policy at the highest level established in 2002 and reorganized into the Gender Equality Commission in 2010; in Lithuania, the permanent Inter-Ministerial Commission on Equal Opportunities for Women and Men as the primary structure for gender mainstreaming established in 2000.

The Non-Governmental Level

Nowadays, the trade unions are usually described as social partners. The political context of the restoration of independence was very damaging for the contemporary trade union movement in the Baltic States. In recent years, trade union density in the Baltic States is among the lowest in the EU: 6–15% of total employment (Glovackas 2009; European Trade Union Institute; OECD iLibrary).

The Baltic Council of Trade Unions was established in 1999 for the sub-regional coordination of activities, including membership increase and adapting to the challenges of free market conditions. The women's sections are traditionally incorporated in the internal structure of the largest national unions.

Traditionally, trade unions are mediators in non-judicial labour dispute resolution between employee and employer. Theoretically, an individual labour dispute may have gender discrimination dimension. Formally, there are three stages for individual labour dispute resolution: negotiation between employee and employer within the enterprise, application to a labour dispute commission (committee) and finally to a court of law. The labour dispute commission (committee) according to respective laws (a separate law or provisions incorporated in the national Labour Codes) is in force in all three Baltic States.

The number of civic organizations dealing with gender equality issues and their quality in terms of institutional capacities is unevenly distributed across the Baltic States and in different periods of time. The first women's studies centre in the Baltic States was founded in Lithuania in 1992, whereas such centres were created in Estonia in 1997 and Latvia in 1998.

The Ombudsman institution

The creation of the ombudsman institution whose purpose is the non-judicial conflict resolution is regarded as a measure to win public trust for the state and democracy. The main characteristic of the ombudsman is its institutional independence in relation to the authority that appoints him or her and its role must always be supplementary to that of the courts⁴.

Along with the establishment of the *classic* parliamentary ombudsman mainly dealing with maladministration, other parliamentary ombudsmen with special mandates have also been created to address public complaints in specific areas, such as discrimination, children's rights, minorities, media, information, finance and so on.

In the Baltic States, commitment to the democratization of society and the rule of law were also demonstrated by the restoration or creation of the ombudsman institution.

In 1999 in Estonia, the function of the ombudsman was entrusted to the Chancellor of Justice (*Õiguskantsler*), an institution that had first been established in 1938, abolished during Soviet times and re-established in 1993; the investigation of complaints of gender discrimination was formally the responsibility of the institution. In 2007, following the provisions of GEA, the Commissioner for Gender Equality and Equal Treatment was appointed for the first time by the Minister of Social Affairs.

In Latvia, the National Human Rights Office, established in 1995 and reformed in the Ombudsman (*tiesībsargs*) institution in 2007, was formally responsible of dealing with complaints on gender discrimination.

The process of establishing Ombudsman institutions in Lithuania was usually described as a “success story” of inter-agency partnership in the democratization process of post-communist countries (UNDP2005). Actually, in parallel with the founding of the European Ombudsman in Strasbourg, the Parliamentary Ombudsman (*Seimokontrolierius*) dealing with maladministration was established in Lithuania in 1995. It created a precedent for the introduction of the (parliamentary) specialized ombudsmen, including the Ombudsman for Equal Opportunities (for Women and Men) in 1999.

The contemporary Baltic offices of the ombudsman have extensive responsibilities: they should not just combat discrimination in individual cases, but also promote ideas of equality within society, i.e. combat structural inequalities.

The detailed description of that time gender equality politics aimed to demonstrate, that in the common context of accession, the three Baltic States expressed different levels of enthusiasm towards the institutionalization of (gender) equality issues and its machinery. In essence, accession accelerated a process of revitalization and reformation of either shelved or dismantled Soviet institutional gender equality mechanisms rather than creating brand new ones to implement a gender mainstreaming approach in public policy. The construction of this machinery was actually similar in terms of key institutions yet different with respect to the time they were officially established.

The differences between the Baltic States in the construction of gender equality machinery were overcome formally by 2007, when an ombudsman institution dealing with discrimination on several grounds, among them gender, was institutionalized in all three states. The final institutionalization of the equality body (ombudsman) in Estonia and Latvia coincided with the declaration of the European Year for Equal Opportunities for All (2007). However, the 2007 celebration of European diversity in terms of gender, race or ethnic origin, religion or belief, disability, age or sexual orientation also commemorates the disappearance of gender (discrimination) from political and public attention.

Lithuania's international political interest in upholding its reputation as a country concerned about women's rights and gender equality remains stable. During the Lithuanian Presidency of the EU in 2013, it chose to review the development of institutional mechanisms for the advancement of gender equality in the member states. Thus, after joining the EU, Lithuania has retained its overall leadership among the Baltic States in the management of gender equality politics especially at the governmental responsibility level, i.e. in the preparation and implementation of programs and action plans. Estonia, however, leads in implementing gender mainstreaming methods and tools (the legal obligation to undertake gender impact assessment and/or gender budgeting). Latvia has regressed somewhat in this respect (EIGE 2014).

Missed Opportunities of the EU Enlargement

In the early 2000s, gender mainstreaming was often characterized as a “missed opportunity” of the EU enlargement in academic and civil groups' circles because the issue was not prioritized in negotiations between the EU and Central and Eastern European (CEE) countries selected for EU membership (Bretherton 2002). The EU on

its part stated that it successfully transformed its policy from a narrow focus on equal treatment in the workplace to an institutional commitment to mainstreaming gender across the policy process (Pollack, Hafner-Burton 2000).

The critical reflection of academic and women's civil groups on the EU requirements on gender equality policies during the negotiation process should be approached with some scepticism. Moreover, their criticisms were mainly related to addressing gender issues not sufficiently clearly in policy areas other than labour market policies and social policies: for instance, human trafficking or violence against women.

Indeed, according to the Commission, equal treatment legislation is a "firmly established integral part" of the *acquis*, which is limited to employment and social policy. On the other hand, "Combating gender inequality and social exclusion is considered by the EU to be first and foremost the responsibility of member states and their national, regional and local authorities in cooperation with the full range of bodies involved, including social partners and NGOs" (Van der Molen, Novikova 2005). Furthermore, any discussion of a missed opportunity in the context of enlargement also has to take into consideration the international commitments to the CEDAW and the BPFA adopted by the candidate states. The documents of the CEDAW, BPFA and the EU's *acquis* constitute a frame for gender equality politics in the EU member and candidate states. Hence, having secured the principal key areas of employment and social policy, there was no need for the European Commission to force gender mainstreaming in negotiations, since that was the purview of the UN organizations.

Another "missed opportunity" highlights the potential of political capacities of civil society in general and women's/gender equality agencies in particular. This issue can be discussed in terms of the institutionalization of the relationship between authorities (policy makers) and civil society.

In the 1990s, the participatory-democratic model, in which either individuals or organizations have access to policy making, was equally and actively promoted in all of the Baltic States by foreign-based initiatives, particularly by the UNDP, the Council of Europe and the Nordic Council of Ministers⁵ (Rai 2003). In practice, however, a rather deliberative democracy model predominated, i.e. the partnership in policy making between authorities and either individuals or organizations is mainly based on the technical aspects of decision-making, such as communications with civil society representatives during round tables, conferences and so on.

In the 1990s, the connections between actors on the different levels of the gender equality machinery were stronger in Lithuania than in Estonia or Latvia due to a better "bottom-up" personal political mobility of the Lithuanian actors. The detailed Lithuanian case of the Ombudsman for Equal Opportunities (for women and men) illustrates how civil initiatives may be articulated from below, but enforcement and institutionalization always come from above⁶.

By 2004, all of the Baltic States chose an expert-bureaucratic model to implement gender mainstreaming, yet even this model was weakened by the absence of gender experts with specialized training and a sophisticated understanding of gender relationships in administrative structures. The expert-bureaucratic model reflects an "integrationist" approach that introduces a gender perspective into existing policy processes

without challenging policy models, which actually legitimate the marginalization of women's advocacy NGOs and feminist/gender researchers in the policy-making process (Van der Molen, Novikova 2005).

In the Baltic States, therefore, the political potential of the civil society is actually very limited in terms of participatory democracy, i.e. open access to policy making, but is in the frame of deliberative democracy.

The last but not least “missed opportunity” of the EU enlargement related to the context of human rights. The restored independence offered “entitled nations” an opportunity to impose the *lex talionis*⁷ and in Estonia and Latvia, unlike Lithuania, citizenship became legally ethicised (Giordano 1997). The missed opportunities of gender mainstreaming, first of all the acceptance of ethicised and obviously gendered citizenship in Estonia and Latvia for EU membership, can be interpreted in terms of the pre-eminence of the EU's geopolitical interests over democratization and gender equality politics in the strategy of enlargement.

Effect of Gender Mainstreaming on Gender Gaps

The evaluators of gender mainstreaming practices usually claim that the expected transformative effect on institutions, practices, and politics on the ground has not necessarily occurred (Pittman 2014). Weaknesses of the policies of gender equality in some member states are seen as coming from the misapplication of the principle of gender mainstreaming (Benítez 2016) and a rather noncommittal manner of the EU gender policies, supported mainly through “soft law”, i.e. when interventions are rather advisory (Daly 2005, Walby 2004).

Despite that gender equality is a fundamental European value and policy priority, the recent *Report on equality between women and men in the EU* notes that there are still gaps in daily life and practice and discrimination based on gender still occurs. Women are discriminated in the labour market, and the employment gap and gender pay gap remain. Women are also relatively underrepresented in decision-making both in politics and on the boards of big companies (EC 2017).

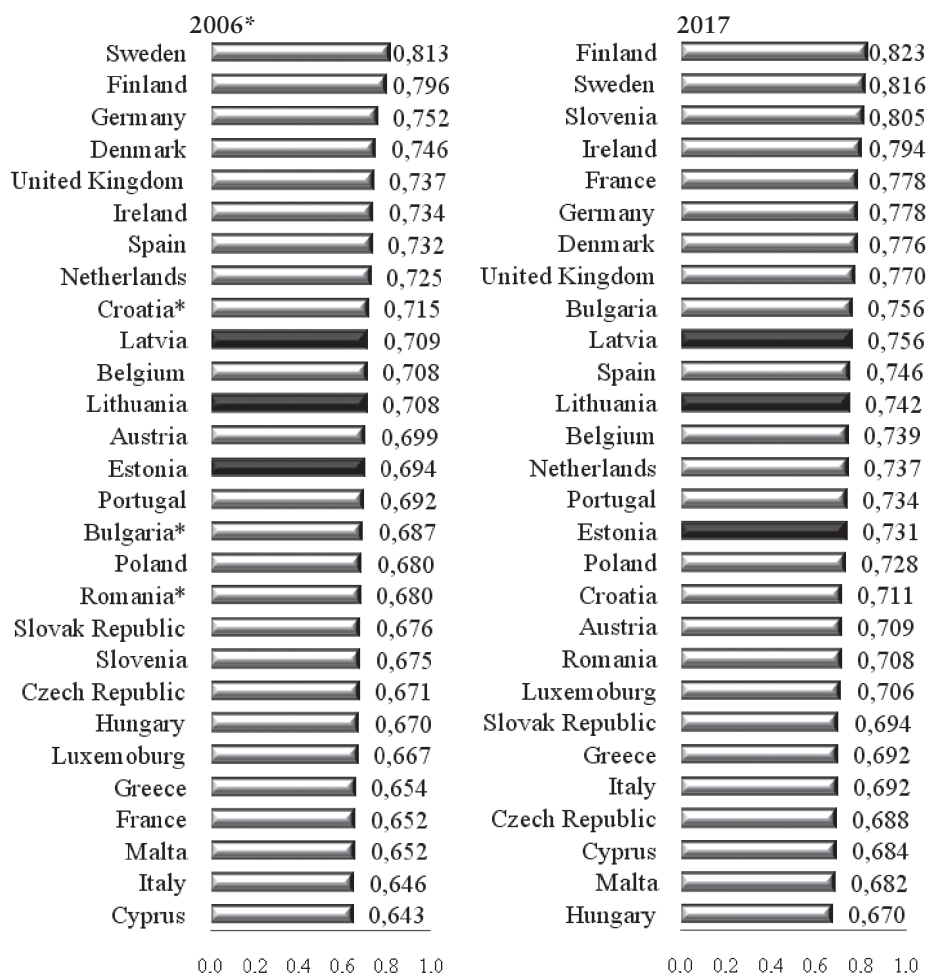
Exploring differences and communalities in actual gender equality in the Baltic States the well-known Global Gender Gap Index (GGGI) used in the Global Gender Gap Reports is employed. GGGI is a scale from 0 (inequality) to 1 (equality). The *Global Gender Gap Report 2017* benchmarks 144 countries on their progress towards gender equality and provides country rankings that allow for effective comparisons.

The gender gaps in Estonia, Latvia and Lithuania are overviewed in the context of the EU.

Figure 1 provides Overall Gender Gap Index in 28th EU countries. It shows that, two Nordics countries (Sweden and Finland) take the top spots among EU countries, remaining among the highest-ranked countries in the region since 2006. The third-place position belongs to Slovenia with 80% of its overall gender gap closed. It is one of the fastest-improving countries – since 2006, Slovenia has closed approximately 13% of its overall gender gap.

Figure 1

Overall Global Gender Gap in the Baltic States and EU, scores



* Countries marked with asterisks (Bulgaria, Romania and Croatia) in 2006 were not EU members, they were included because of the comparability of data.

Source: elaborated by the authors using data of the Global Gender Gap Index Report 2006, Global Gender Gap Index Report 2017.

On the other hand, the lowest-ranked country in EU is Hungary, which has closed only 67% of its overall gender gap.

According to the Global Gender Gap Index, Baltic States are among the EU Member States with the average / slightly above-average gender equality. In 2017, the progress on closing the global gender gap in Latvia stands at a score of 0,756 meaning that gender gap of 24% remains to be closed; Lithuania's score is 0,742 and Estonia has a lowest score of 0,731.

Almost all EU countries have increased their overall score compared to 2006, except Croatia, which is the only EU country with the decrease in its overall score. Nevertheless, Latvia and Lithuania are continuously maintaining the same ranking within EU compared 2006 and 2017 – Latvia ranks 10th and Lithuania 12th. Moreover, Estonia experiences a decline in its overall Global Gender Gap Index ranking slipping several ranks – in 2006 it was ranked 14th, while in 2017 – 16th.

The overall Gender Gap Index is calculated as average of four subindexes that provide a fuller context for the country's performance. The Gender Gap Index examines the gap between men and women in four fundamental categories (i.e. subindexes): Economic participation and opportunity, Education attainment, Political empowerment and Health and survival.

The magnitude of gender gaps on these subindexes is the combined result of various socioeconomic, policy and cultural variables (GGGR 2017):

- *Educational attainment subindex* captures the gap between women's and men's access to education through ratios of women to men in primary-, secondary- and tertiary-level education. The ratio of the female literacy rate to the male literacy rate is included to illustrate a longer-term view of each country's ability to educate women and men in equal numbers.
- *Health and survival subindex* provides an overview of the differences between women's and men's health through the gap between women's and men's healthy life expectancy and the sex ratio at birth. The healthy life expectancy measure estimates the number of years that women and men can expect to live in good health, taking into account the years lost due to violence, disease, malnutrition and other relevant factors. The sex ratio at birth variable aims to capture the phenomenon of "missing women", that prevails in countries with a strong son preference.
- *Economic participation and opportunity subindex* measures the gender gaps in economic participation, remuneration and the advancement. The participation gap is captured using the difference between women and men in labour force participation rates. The remuneration gap is captured through the ratio of estimated female-to-male earned income and through the wage equality for similar work. The disparities in the advancement of women and men are estimated through the ratio of women to men among legislators, senior officials and managers, and the ratio of women to men among technical and professional workers.
- *Political empowerment subindex* measures the differences between men and women at the highest level of political decision-making through the ratio of women to men in ministerial positions and the ratio of women to men in parliamentary positions, and in term of years in executive office (prime minister or president) over the last 50 years.

Figures 2 and 3 display the scores of European Union countries by all four subindexes.

Educational attainment and Health and survival subindexes are those with the lowest differences in scores, with most countries clustering around a fairly high achievement point near parity.

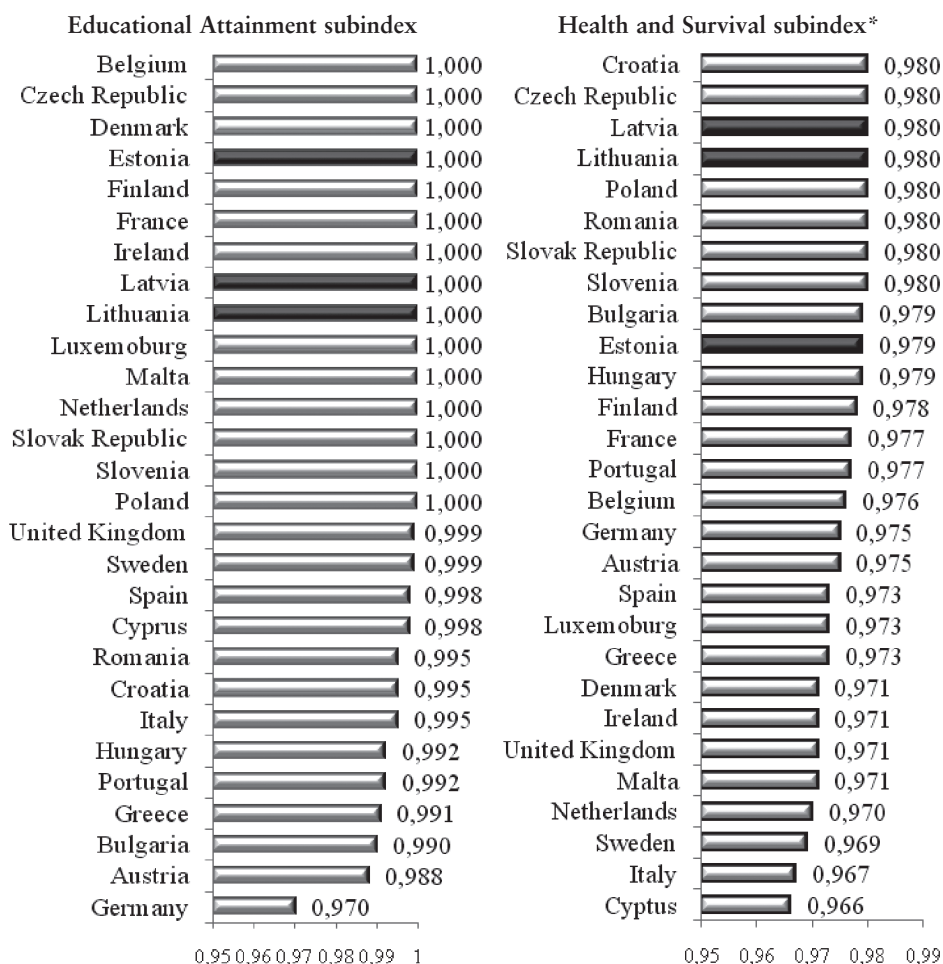
According to the Educational attainment subindex, half of EU countries (i.e. 14 out of 28) have fully closed their Educational attainment gender gaps, all three Baltic States are among them.

In 2017, eight EU countries have *managed* to achieve gender parity on Health and survival subindex, including Latvia and Lithuania. Estonia, along with Bulgaria and Hungary, follow next and performs high score on health subindex, being only one percent below of the best.

Generally, it could be said that Baltic States maintain their strong performance on fully (or almost fully in case of Estonia) closing both their Educational attainment and Health and survival gender gaps.

Figure 2

Gender Gap on Educational Attainment and Health and Survival subindexes in the Baltic States and EU, 2017



* On Health and Survival subindex the highest possible score is 0,980 (parity)

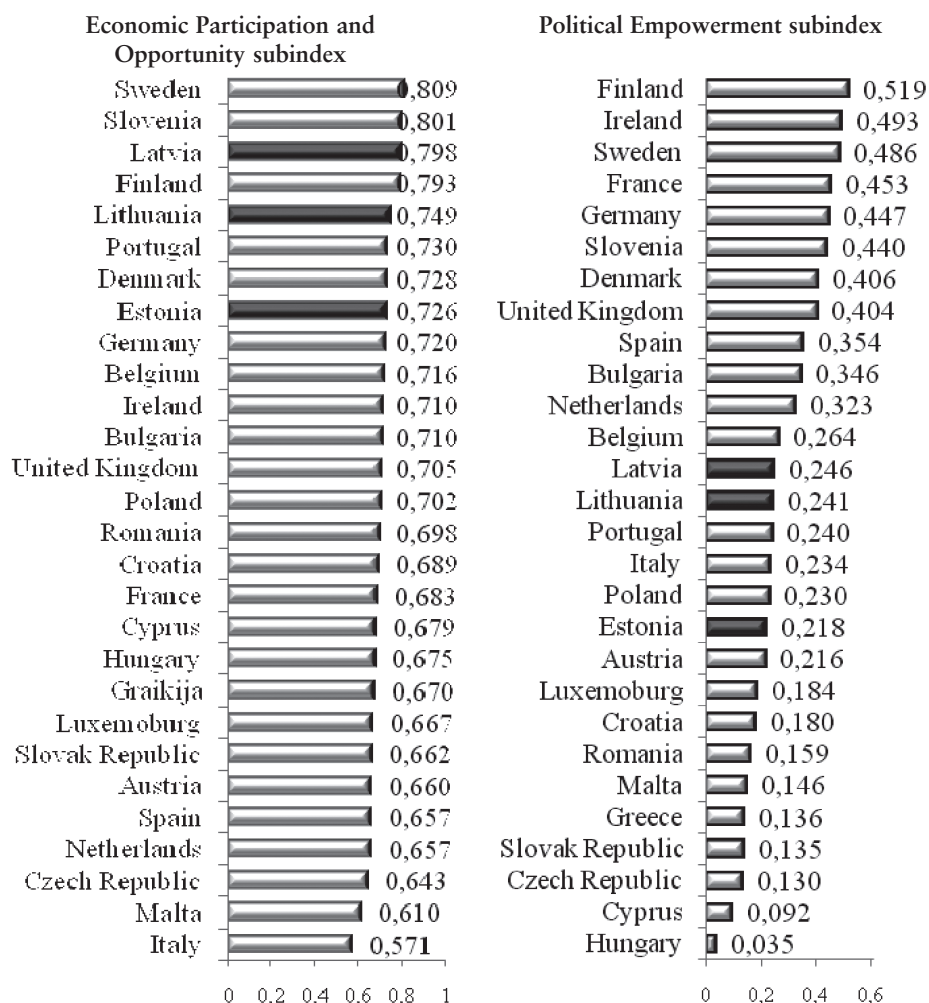
Source: elaborated by the authors using data of the Global Gender Gap Index Report 2006, Global Gender Gap Index Report 2017.

While the previous two subindexes present very optimistic results, the same cannot be said for the economic sphere. Here in fact the gender gap among EU countries begins to widen from 81% of the gap being closed in Sweden to 57% in Italy (see Figure 3).

Nevertheless, the Baltic States are relatively highly placed among European Union countries – Latvia and Lithuania occupy the top five spots on this subindex. Estonia follows closely and as well scores above the EU average. It ranks 8th on the Economic participation and opportunity subindex in EU.

Figure 3

Gender Gap on the Economic Participation and Political Empowerment subindexes in the Baltic States and EU, 2017



Source: elaborated by the authors using data of the Global Gender Gap Index Report 2006, Global Gender Gap Index Report 2017.

It should be mentioned that women all around the World continue to be largely marginalized from the *political sphere*. According The Global Gender Gap Report, the *political empowerment* is one of the spheres where the biggest gender gap exists. In 2017, the world's highest Political empowerment subindex reaches 0,750 (Iceland), while in European Union – 0,519 (Finland).

Hungary is the worst-performing country in the EU on the Political empowerment subindex, it records the lowest score (0,035) meaning that gender gap of 65% remains to be closed.

Looking at the Baltic States, it is evident that political sphere in the terms of women's empowerment here is an issue as well. Despite good educational attainment, women in Baltic States have relatively little political empowerment. Latvia and Lithuania rank in the middle of the European Union countries (13th and 14th respectively), having closed 25% and 24% of their political gender gap. While, Estonia is placed in the lower half of the list within EU rankings, standing at a score of 0,218 on political empowerment subindex. Estonia's lower performance on this subindex compared to Latvia and Lithuania is partly caused due to the fact that unlike in Latvia, which currently has a female prime minister and female parliament speaker, and Lithuania, which has a female president, no female politician has managed to hold such high positions in Estonia.

Summing up the results of Global Gender Gap Report, it should be underlined that no country in the world has fully closed its overall gender gap. By looking at the individual scores of EU countries it is observed that the region performs very well in the educational and health dimensions. In both cases it can be affirmed that women are approaching to close the gap with men. While, larger gender gaps emerge in the economic and political spheres.

Gender equality in Baltic States stands at the EU average, according to the overall Gender Gap Index, with the scores recorded on Education attainment, Health and Economic participation subindexes being superior to the average percentage in EU. However, the major challenge for the Baltic States is gender imbalance in political sphere. Women's Political empowerment is relative poor, placing Baltic States on the middle and lower-middle positions within European Union.

Conclusions

The persistence of significant *inequalities* between women and men confirms the relevance of the gender equality issues for all EU countries.

In the 1990s, there were high hopes that gender mainstreaming would revolutionize the way that gender was addressed, would transform institutions to become more gender equitable, and would radically reduce gender inequalities and discriminations. Nowadays, it is actually recognized that introduction of the principle of gender mainstreaming has been merely rhetorical in most cases.

In 1995, after application of Baltic States for EU membership started the formal re-addressing of national gender equality politics based on an approach to woman mainstreaming. In the context of accession, the three Baltic States expressed different

levels of enthusiasm for the (re)institutionalization of (gender) equality issues and the related machinery. The construction of this machinery in three Baltic States was actually similar in terms of key institutions but different with respect to the time they were officially established.

The differences between the Baltic States in the institutionalization of the contemporary structure of gender equality machinery were overcome once they became EU members and national legislation on gender equality was fully harmonised with EU law, i.e. in 2007.

The confirmation of the institutionalization of the gender equality machinery, the content of national governmental activities and the predominant relationship model with civil society in the Baltic States indicate that gender mainstreaming is likely yet another and the most recent social policy tool for the management of human resources.

According to the Global Gender Gap Index, the Baltic States are among the EU Member States with the average / slightly above-average gender equality.

Latvia usually demonstrates a minimal attachment to gender mainstreaming and its institutions among the Baltic States. Moreover, Latvia has regressed somewhat in this respect in 2013. In quantitative terms, however, current Latvia can be considered as having more equality than Lithuania and Estonia. Among all countries participated in the research in 2017, Latvia ranks 10th, Lithuania – 12th, and Estonia, accordingly, 16th.

The case of Latvia leveraging the rank up due to positive trends in closing gender gaps in both Economic Participation and Opportunity and Political Empowerment subindexes confirms an assumption that rather social changes related to national demographical and economic development than merely technocratic sophistication of gender equality politics has a profound impact on current statistical indexes related to gender equality.

Notes:

(1) This article is based on research project “Quality of democracy and equal opportunities: attitudes and social practice of Lithuanians” funded by a grant (No. GER-012/2017) from the Research Council of Lithuania. Period of implementation 2017–2018.

(2) In 1993, the European Council recognized the right of the CEE countries to join the EU upon fulfilment of three political, economic and administrative accession conditions known as the Copenhagen criteria. See: Accession (Copenhagen) criteria, EC, 1993. Available: https://ec.europa.eu/neighbourhood-enlargement/policy/glossary/terms/accession-criteria_en (accessed 01.10.2017).

(3) Gender equality as an objective of European integration was formalized by the Treaty of Amsterdam (1997) and further transformed into one of the values of the EU by the Treaty of Lisbon (2007). See *EU treaties*, EU. Available: https://europa.eu/european-union/law/treaties_en (accessed 01.10.2017).

(4) Research on the ombudsman chiefly investigates the institution from a legal standpoint and usually from a comparative perspective.

(5) The (women's/gender equality) agencies most effectively influence government policy if they are located at a high level within the national decision-making hierarchy, have a clear mandate and functional responsibility, are linked to civil society groups, have adequate human and financial resources and are accountable to the public.

(6) The ‘top-down’ rather than ‘bottom-up’ principle, at the core of most political and social initiatives, constitutes a significant peculiarity of civic identity in the Baltic States since Soviet times, including *perestroika* in the mid-1980s.

(7) The principle or law of retaliation by which a punishment inflicted should correspond in degree and kind to the offense of the wrong doer, as in an eye for an eye, a tooth for a tooth; retributive justice. See: <http://www.dictionary.com/browse/lex-talionis> (accessed 20.11.2017).

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EKONOMIKA

Edmunds Čižo

ASSESSMENT OF CONVERGENCE PROCESSES OF THE FINANCIAL MARKETS' DEPTH IN THE EU MEMBER STATES

The aim of the research is testing the hypothesis on the convergence/equalization of financial market levels in the EU member states in the period 1993–2015. The assumption put forward states that the states that previously demonstrated low values of financial depth indicators, later showed outperforming growth rates of these indicators as compared to the states that initially had a certain relatively high level. At a macro-economic level the depth of a state's financial market is defined as a total/sum of financial claims and liabilities in relation to GDP, and it shows to what extent corporations, households, and state institutions can finance their activities using financial markets and financial mediators. The relevance of the research is proved by the fact that the deepening of financial markets contributes to the increase in the level of stability and security in the economy, this way allowing to serve growing flows of trans-border capital. Deeper markets can provide alternative sources of financing during international liquidity crises, constraining sharp fluctuations of asset prices and currency exchange rates. The approach offered in the article is orientated towards determining dynamic changes in the development of the financial market in the EU member states. The main analytical apparatus for testing the hypothesis on financial convergence is based on the construction of "Barro regressions".

Key words: depth of the financial market, convergence.

ES valstu finanšu tirgus dziļuma konverģences procesu novērtējums

Pētījuma mērķis ir hipotēzes par ES valstu finanšu tirgus attīstības līmeņu satuvināšanās (izlīdzināšanas) pārbaude par laika periodu no 1993. līdz 2015. gadam. Tiek izvirzīts pieņēmums, ka valstis, kurām iepriekš bija raksturīgi zemi finanšu dziļuma rādītāju lielumi, rezultātā demonstrēja šo rādītāju apsteidzošus augšanas tempus salīdzinājumā ar valstīm, kurām sākotnēji bija noteikts samērā augsts līmenis. Makroekonomiskā līmenī valsts finanšu tirgus dziļumu nosaka kā finansiālo prasību un saistību kopumu attiecībā uz IKP un parāda, cik lielā mērā korporācijas, mājsaimniecības un valsts institūti spēj finansēt savu darbību uz finanšu tirgus un finanšu starpnieku rēķina. Pētījuma aktualitāte tiek pastarpināta ar to, ka finanšu tirgus padziļināšana veicina ekonomikas stabilitātes un drošības līmeņa paaugstināšanos, ļaujot apkalpot pieaugošās pārrobežu kapitālu plūsmas. Dziļāks tirgus var nodrošināt alternatīvus finansējuma avotus starptautiskās likviditātes krīžu laikā, ierobežojot straujās aktīvu cenu un valūtas kursa svārstības. Rakstā piedāvātā pieeja ir vērsta uz dinamisku izmaiņu atklāšanu ES valstu finanšu tirgus attīstībā. Galvenais hipotēzes par finanšu konverģenci pārbaudes analītiskais aparāts balstās uz "Barro regresiju" konstruēšanu.

Atslēgas vārdi: finanšu tirgus dziļums, konverģence.

Оценка процессов конвергенции глубины финансовых рынков в странах ЕС

Целью исследования является проверка гипотезы о сближении (выравнивании) уровней развития финансового рынка стран ЕС за период с 1993 по 2015 гг. Выдвигается предположение о том, что страны, отличавшиеся ранее низкими значениями показателей финансовой глубины, впоследствии демонстрировали опережающие темпы роста этих показателей в сравнении с государствами, изначально имевшими определённый достаточно высокий уровень. На макроэкономическом уровне глубина финансового рынка страны определяется как совокупность финансовых требований и обязательств по отношению к ВВП и показывает, в какой степени корпорации, домашние хозяйства и государственные институты могут финансировать свою деятельность за счет финансовых рынков и финансовых посредников. Актуальность исследования опосредуется тем, что углубление финансовых рынков способствует повышению уровня стабильности и безопасности экономики, позволяя обслуживать растущие потоки трансграничных капиталов. Более глубокие рынки могут обеспечивать альтернативные источники финансирования во время кризисов международной ликвидности, ограничивая резкие колебания цен активов и валютного курса. Предлагаемый в статье подход ориентирован на выявление динамических изменений в развитии финансового рынка стран ЕС. Основной аналитический аппарат проверки гипотезы о финансовой конвергенции базируется на построении «регрессий Барро».

Ключевые слова: глубина финансового рынка, конвергенция.

Introduction

A financial market is a special sphere of economic relations – a system of market financial institutions and infrastructure mechanisms that create supply and demand on a specific product: financial assets and instruments, the sum of economic relations and institutions related to the movement of financial capital. Institutionally, a financial market includes banks and other numerous financial institutions (pension funds, insurance companies, investment funds, financial companies, securities companies, stock exchanges, and other infrastructure organizations). A financial market is one of the key components of a financial system of any state, the development level of which predetermines significantly the performance level of a national economy. Being an instrument that evens cyclic fluctuations in economy, a financial market is one of the warrants for the stable economic development of the state. It happens when a financial market solves such basic tasks by providing banks, enterprises, for-profit and non-profit organizations, and personal savings with the most complete and fastest ways of movement of free cash for attracting funds to innovative economic development by means of creating innovative products and technologies, and technical upgrading of already existing enterprises (Bikas, Bikas 2016; Stasytytė 2015; Novickytė, Pedroja 2014; Dubauskas 2012).

The concept of “financial depth” in macroeconomics was first introduced at the end of the 1980s in publications by the World Bank in order to reflect the connection between the saturation of economy with financial resources, the complexity and multidivisional structure of a financial-monetary and credit system on the one hand, and the rates of economic development on the other. At a macro-economic level the depth of a state’s financial market is defined as a total of financial claims and liabilities in relation of GDP, and it shows to what extent corporations, households, and state

institutions can finance their activities using financial markets and financial mediators. The level of financial depth in an economy establishes the advantage for a higher economic development (Global Financial Development Report 2013). It is much easier for states with deeper financial markets to enforce an accommodative monetary policy, as a developed financial market is able to absorb excessive liquidity without a significant inflation rate. According to N. Loayza and R. Rancič (2004), deepening of financial markets in the long term stabilizes a financial system more, as the ability to serve flows of capital without sharp fluctuations of prices on assets and currency exchange improves.

It is possible to gain the understanding of the role of a financial market in an economy on the basis of the indicators of financial depth that are relative indicators demonstrating the proportion of a particular segment of this market in relation to GDP. Later, this understanding has acquired a more complex character providing means for a more comprehensive assessment of the level of financial intermediation in general as well as its certain segments (Christopoulos et al. 2004). To a greater extent, the depth of financial markets has come to be based on monetary indicators of a wide monetary base and liquid liabilities of commercial banks and non-financial institutions (Montiel 2011). The great advantage of the financial depth indicator, taking into account its universal nature, is the ability to perform rather consistent international comparisons from the viewpoint of market segments as well as the analysis of financial positions of certain states or clusters of states in general and according to the main groups of financial products.

A few groups of the basic indicators that characterize the development level of a banking system and the development level of a securities market are used in order to identify the financial depth coefficient of markets in particular states or a group of states as part of the global financial market. Taking into consideration the limitations of the availability of comparable statistical series over a long time period, the financial convergence hypothesis is tested here on the basis of the following financial depth indicators: **liquid liabilities to GDP¹ (%)**, **private credit by deposit money banks to GDP (%)**, **deposits to GDP² (%)**, **deposit money bank assests to GDP³ (%)**, **bank deposits to GDP⁴ (%)**. The trends in the development of these indicators in the period 1993–2015 have been identified.

Design and the sample of the research

Financial convergence implies the process of convergence of states in terms of the level of financial depth that is characterized by the abovementioned indicators. The concept and quantitative methods for the assessment of convergence first were developed for research into the dynamics of economic growth. Two concepts of convergence, interrelated but determining different effects, prevail in the empiric study: β -convergence (Baumol 1986; Barro and Sala-i-Martin 1992) and σ -convergence (Sala-i-Martin 1996 a; Sala-i-Martin 1996 b; Islam 2003).

According to β -convergence, *states with low absolute values of the indicator under study at the initial period of time have on average a higher growth rate of this indicator during the process of integration*. Growth-initial level regressions where the growth

rate is a dependent variable, but the initial level of the indicator is an independent variable are used for the assessment of β -convergence. The simplest regression of this type is:

$$y_i = a + \beta \ln(x_{it-T}) + e, \quad (1)$$

where:

- x_{it-T} – an indicator at the point of time preceding the current point of time t at T periods (as a rule, the initial period of integration or another point of time relevant for the development of integration grouping),
- β – a coefficient to be evaluated,
- y_i – average growth rates in i - state over T periods, calculated as $\ln(y_{it})/\ln(y_{it-T})$,
- e – random deviation. The value of the β coefficient is an indicator of convergence.

If $\beta < 0$, a high level of the indicator at the initial time period correlates with relatively lower growth rates.

Unlike β -convergence, σ -convergence presupposes *the decrease with time in a standard deviation of the indicator's value* which levels the discrepancy between states. Another indicator that is often used when there is a trend in time series is the relation of a standard deviation to average (variation coefficient). β -convergence (i.e. a quicker growth of indicators in the states with lower values of this indicator at the initial period) does not necessarily lead to the decrease in inequality on the indicator under study, namely to σ -convergence (Barro and Sala-i-Martin 1991, 1992; Barro and Sala-i-Martin 2010; Friedman 1992; Quah 1993; Quah 1999; Magrini 2004; Wodon, Yitzhaki 2006). For example, there is no σ -convergence in a situation when a group of states with initially low absolute values of the indicator constantly changes places with the states with the initially higher absolute values of the indicator, although the overall level of gap between these states is permanent (Sala-i-Martin 1996 a; Sala-i-Martin X. 1996 b; Barro, Sala-i-Martin 1995).

The range of R variation and standard deviation are the most common indicators of the variation. Their calculation is as follows:

$$R = X_{\max} - X_{\min}; \quad (2)$$

$$\sigma = \frac{\sum (x_i - \bar{x}) f_i}{\sum f_i}, \quad (3)$$

where:

- X_{\max} \checkmark X_{\min} – largest and smallest value of the characteristic;
- \bar{x} – the average value of the characteristic;
- x_i – variations of the characteristic;
- f_i – frequency; $i = 1, 2, \dots, n$ – a number of variants.

We will use the relative indicators of the variation based on the abovementioned indicators: the coefficient of range (K_R) and the coefficient of variation (V_s). Their calculation is as follows:

$$K_R = \frac{X_{\max} - X_{\min}}{\bar{x}}; \quad (4)$$

$$(V_\sigma) = \frac{\sigma}{\bar{x}}, \quad (5)$$

where:

δ – a standard deviation,

\bar{x} – an average value,

X_{\max} and X_{\min} – the largest and smallest value of the characteristic in the selection.

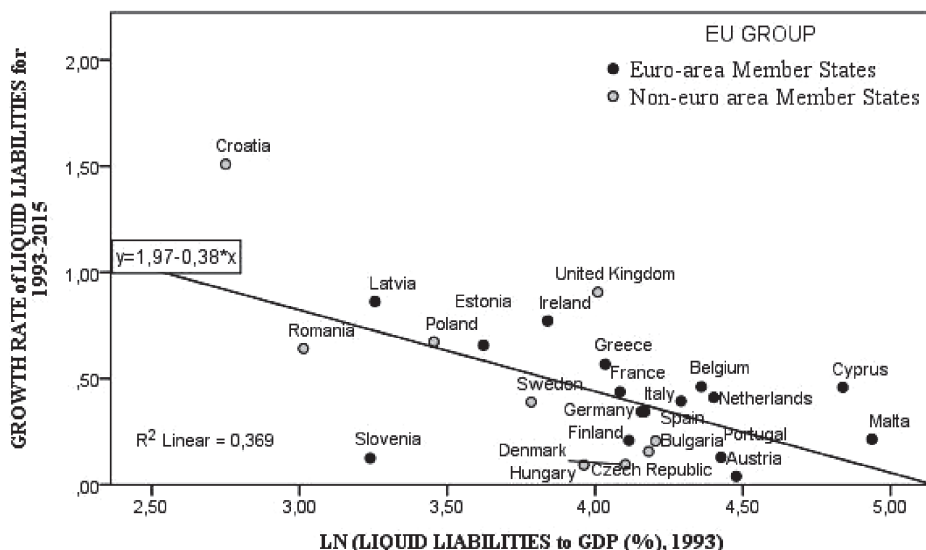
The increase of the coefficient of range and coefficient of variation directly signifies the enhancement of the characteristic in the population under study. Therefore, analysing dynamics of the abovementioned coefficients in relation to key parameters, it is possible to provide a qualitative characteristic of the process of growth of the existing differences in the sphere of indicators of market depth in the states under study.

Results of the Research

A primary graphical analysis raises the possibility of the existence of a negative interrelation between initial levels of the financial depth indicators and their average annual value of the further growth.

Figure1

Interrelation between values of the “LIQUID LIABILITIES to GDP (%)” indicator and its growth rates in the period 1993–2015



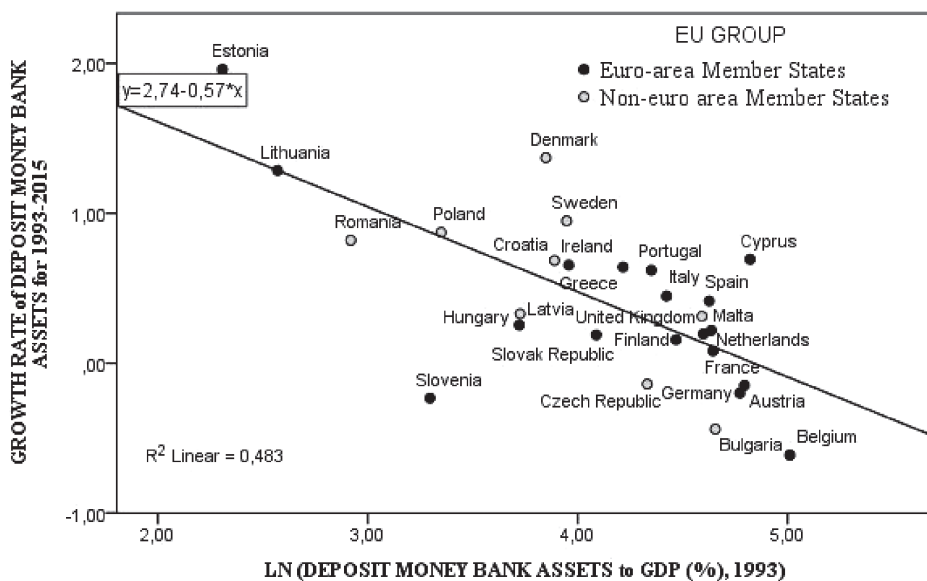
Source: Developed by the author. Raw data are from the electronic version of the IMF's International Financial Statistics: Financial Development and Structure Dataset <http://www.worldbank.org/en/publication/gfdr/data/financial-structure-database>

The “liquid liabilities to GDP (%)” indicator evaluates the cost of liquid liabilities of banks and other financial institutions in relation to a state’s economy. Figure 1 shows that in 1993 such states as Croatia, Latvia, Romania, Poland, Slovenia, and Estonia had low values of the “liquid liabilities to GDP (%)” indicator. However, Croatia, Latvia, Poland, and Estonia had the growth in this indicator in the period 1993–2015 which was much higher than the average growth among the EU member states.

The “deposit money bank assets to GDP” indicator that characterizes the overall size of a banking sector in relation to a state’s economy is represented by low values in 1993 in such states as Estonia, Lithuania, Romania, Poland, and Slovenia. However, the growth rates of this indicator are higher than average in Estonia, Lithuania, and Poland (Fig. 2). Apparently, the higher the level of values of the “deposit money bank assets to GDP” indicator in the EU member states, the lower the growth rates of this indicator.

Figure 2

Interrelation between values of the “DEPOSIT MONEY BANK ASSETS to GDP (%)” indicator and its growth rates in the period 1993–2015



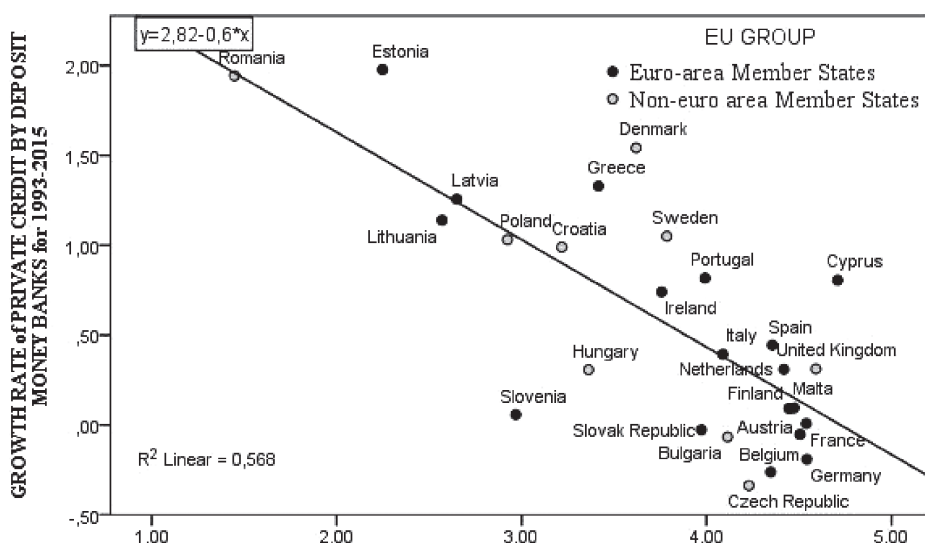
Source: Developed by the author. Raw data are from the electronic version of the IMF’s International Financial Statistics: Financial Development and Structure Dataset <http://www.worldbank.org/en/publication/gfdr/data/financial-structure-database>

The “private credit by deposit money banks to GDP (%)” indicator (Fig. 3) evaluates the cost of credits provided by commercial banks to a private sector in relation to a state’s economy. The higher its value is the better. Figure 3 shows that such states as Romania, Estonia, Latvia, Lithuania, Poland, and Slovenia in 1993 had low values of

the “private credit by deposit money banks to GDP (%)” indicator. However, Latvia, Estonia, and Croatia had the growth of this indicator in the period 1993–2015 that was higher than the average growth among the EU member states.

Figure 3

Interrelation between values of the “PRIVATE CREDIT BY DEPOSIT MONEY BANKS to GDP (%)” indicator and its growth rates in the period 1993–2015

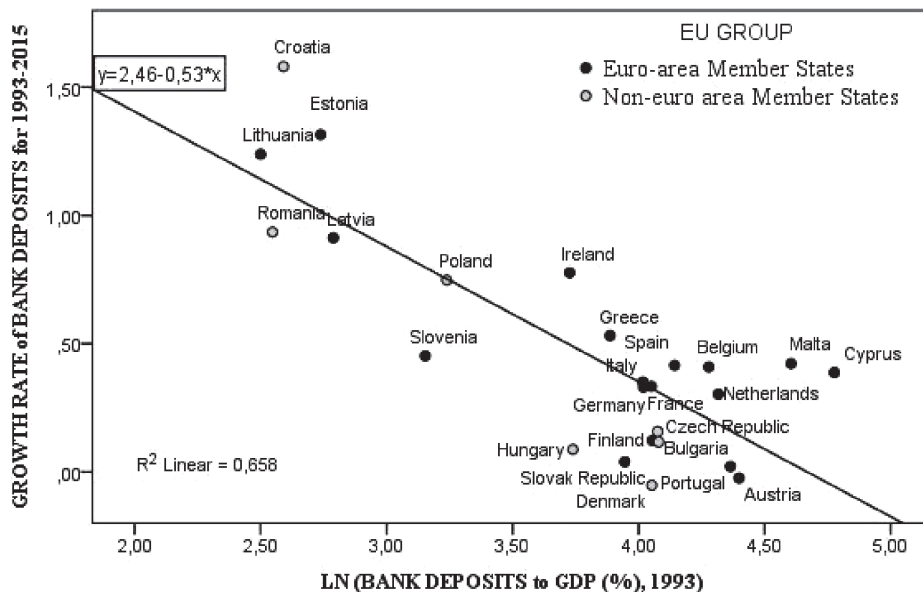


Source: Developed by the author. Raw data are from the electronic version of the IMF's International Financial Statistics: Financial Development and Structure Dataset <http://www.worldbank.org/en/publication/gfdr/data/financial-structure-database>

The “bank deposits to GDP (%)” indicator evaluates the cost of bank deposits in relation to a state's economy. Fig. 4 shows that such states as Croatia, Lithuania, Estonia, Romania, Latvia, Poland, and Slovenia are characterized with initially low values of this indicator. However, in Croatia, Estonia, Lithuania, and Poland the “bank deposits to GDP (%)” indicator in the period 1993–2015 grew at the rates with the values higher than average in the EU.

Therefore, it has been graphically identified that states with initially low values of financial depth indicators have higher growth rates of these indicators. Coefficients of equations of linear regressions of all the abovementioned indicators of financial depth are provided in Table 1.

Figure 4
Interrelation between values of the “BANK DEPOSITS to GDP (%)” indicator and its growth rates in the period 1993–2015



Source: Developed by the author. Raw data are from the electronic version of the IMF's International Financial Statistics: Financial Development and Structure Dataset <http://www.worldbank.org/en/publication/gfdr/data/financial-structure-database>

Table 1
Results/outcomes of the regression analysis of the interrelation between values of financial depth indicators in 1993 and their growth rates in the period 1993–2015

Indicator	Barro's regression equation
liquid liabilities to GDP (%)	$Y = 1.97 - 0.38 * X$; $R^2 = 0.369$
deposit money bank assets to GDP (%)	$Y = 2.74 - 0.57 * X$; $R^2 = 0.483$
private credit by deposit money banks to GDP (%)	$Y = 2.82 - 0.6 * X$; $R^2 = 0.568$
bank deposits to GDP (%)	$Y = 2.46 - 0.53 * X$; $R^2 = 0.658$

Source: Developed by the author. Raw data are from the electronic version of the IMF's International Financial Statistics: Financial Development and Structure Dataset <http://www.worldbank.org/en/publication/gfdr/data/financial-structure-database>

However, the convergence hypothesis does not work for the financial depth indicators “liquid liabilities to GDP (%)” and “deposit money bank assets to GDP (%)”: although, the coefficients at the initial levels of these indicators have a negative sign, R^2 is lower than 0.5 ($R^2 = 0.369$ and $R^2 = 0.483$ respectively). The model's conditional dispersion differs significantly from the dispersion of real values Y , therefore, the

model does not reflect the reality. The trend for a gradual convergence of the EU member states according to the “private credit by deposit money banks to gdp (%)” and “bank deposits to gdp (%)” indicators as $R^2=0.568$ and $R^2=0.658$ respectively, may be considered valid and proved.

The values of variation coefficients of financial depth indicators in 1993 and 2015 have also been identified (Table 2). The first one measures dispersion and shows dynamics of inequality: if there is dispersion, the coefficient of variation or other statistical indicators of inequality fall, and we may say there is convergence, otherwise, indicators disperse in time.

Table 2

**Values of variation coefficients of financial depth indicators
in the EU member states in 1993 and 2015**

	$V\sigma$ 1993	$V\sigma$ 2015	$K_{R\ 1993}$	$K_{R\ 2015}$
liquid liabilities to GDP (%)	0.44	0.35	1.85	1.40
1993 = 100%	100	81	100	76
deposit money bank assets to GDP (%)	0.51	0.44	1.78	1.60
1993 = 100%	100	85	100	90
private credit by deposit money banks to GDP (%)	0.56	0.54	1.75	2.04
1993 = 100%	100	98	100	116
bank deposits to GDP (%)	0.50	0.37	2.01	1.46
1993 = 100%	100	73	100	73

Source: Developed by the author. Raw data are from the electronic version of the IMF's International Financial Statistics: Financial Development and Structure Dataset <http://www.worldbank.org/en/publication/gfdr/data/financial-structure-database>

The data shown in Table 2 confirm the σ -convergence hypothesis in the EU member states in the period 1993–2015 according to the following indicators: “liquid liabilities to GDP (%)” – the variation coefficient decreased by 19%, the scatter coefficient – by 24%; “deposit money bank assets to GDP (%)” – the variation coefficient decreased by 15%, the scatter coefficient – by 10%; “bank deposits to GDP (%)” – the variation coefficient decreased by 27%, the scatter coefficient – by 27%. The σ -convergence hypothesis in the EU member states in the period 1993–2015 is not proved according to the “private credit by deposit money banks to GDP (%)” indicator: the variation coefficient decreased by 2%, but the scatter coefficient increased by 16%.

Analyzing Table 3, it is determined that there are a few situations that are evident:

- 1) β -convergence and σ -convergence ($\beta(+)$; $\sigma(+)$);
- 2) β -convergence but no σ -convergence ($\beta(+)$; $\sigma(-)$);
- 3) no β -convergence but there is σ -convergence ($\beta(-)$; $\sigma(+)$).

The first situation explains that a quicker growth of indicators occurs in the states with lower values of these indicators at the initial period of time, which with time leads to the decrease in the coefficient of variation and scatter coefficient of indicators in a specific group of states.

Table 3

**Summary table of the occurrence of β -convergence and σ -convergence
in the groups of states**

Indicators	EU member states
liquid liabilities to GDP (%)	$\beta(-)$; $\sigma(+)$
deposit money bank assets to GDP (%)	$\beta(-)$; $\sigma(+)$
private credit by deposit money banks to GDP (%)	$\beta(+)$; $\sigma(-)$
bank deposits to GDP (%)	$\beta(+)$; $\sigma(+)$

Note: (+) – convergence occurs; (-) – convergence does not occur.

Source: Developed by the author. Raw data are from the electronic version of the IMF's International Financial Statistics: Financial Development and Structure Dataset
<http://www.worldbank.org/en/publication/gfdr/data/financial-structure-database>

The second situation is possible when the group of states with initially low absolute values of the indicator constantly changes places with the states with initially higher absolute values of the indicator, but the general level of gap between these states is permanent.

The third situation might be explained by the fact that false conclusions made on the basis of the β -convergence analysis have been caused by the loss of information. When analysing σ -convergence, a researcher has an opportunity to trace the dynamics of economies' inequality according to earnings over the whole period under review, whereas, when testing β -convergence, a researcher deals only with two moments of time – the beginning and the end of this period. And if during this period there was a short-term decrease in inequality with its further growth, as a result of which inequality turns out to be lower at the end of the period than at the beginning of it, the β -convergence will be detected, in spite of a real trend to the growth in inequality. Galton's paradox appears in β -convergence: it always occurs under the constant in time dispersion of the values of the indicator under study. In this case β -convergence is bilateral: it occurs in a forward direction of time as well as a backward one. Moreover, β -convergence may be compatible not only with a lack of convergence in earnings, but even with divergence. The main point of divergence between results of the comparison of the inequality indicator according to earnings at the two moments of time and the β -convergence analysis is as follows: if two economies "exchange" the values of the indicator under study, the inequality value will not change. However, in Barro's regression this phenomenon does not affect the result, as Barro's regression identifies economies according to the observation number and establishes that at the end of the period one of these values decreased, but another one increased. Therefore, the evaluated coefficient of Barro's regression considers a relative mobility of the indicator's values, i.e. the change in their ranges. However, a relative mobility itself cannot change the distribution of earnings (a dispersion of distribution, in particular). The above mentioned leads to the conclusion that the occurrence of β -convergence does not provide ground for convergence.

Conclusions

The process of unification and harmonization of states' tax systems, development of a mechanism for the implementation of a joint foreign exchange policy and introduction of a common currency – Euro, as well as the process of unification of the banking sphere's activities, creation of a common market for banking services, support by banking directives for agreed rules of depositor, investor and consumer protection, principles of banking secrecy protection, rules of financial reporting, etc. are powerful factors of deepening of financial integration. Therefore, the implementation of the policy agreed by the EU member states encourages the solution of both short-term and long-term structural challenges/problems. The enhancement of performance efficiency of financial markets due to the increase in the mobility of international capital also encouraged the integration (Lane, Reichlin 2016). Other researchers who consider convergence as the system for levelling differences (Baele et al. 2004), identify financial integration as a market for a certain financial tool, when economic agents with the same relevant characteristics act in the same administrative environment by equal rules.

In the period 1993–2015 there was a decrease in differences in the EU member states according to the “private credit by deposit money banks to GDP (%)” indicator and the “bank deposits to GDP (%)” indicator, although, there was no convergence determined according to the “liquid liabilities to GDP (%)” and “deposit money bank assets to GDP (%)” indicators. Summarizing the carried out analysis of the hypothesis on the convergence of financial depth's indicators, it should be emphasized that it found a limited confirmation. Other scientists (Giacinto, Esposito, 2004), studying the convergence of the indicators of financial development in thirteen European states in the period 1995–2003 also came to the conclusion that there is convergence of the indicators of financial development, although not for banking products. A group of European researchers (Murinde et al. 2004) identified convergence in the stock market on the basis of analysis of markets in seven European states in the period 1972–1996, but only in the stock segment. Therefore, the findings on analysis of the convergence process obtained by numerous researchers are determined by the period, methodology and the research object (Čižo et al. 2018).

Notes:

(1) LIQUID LIABILITIES to GDP (%): ratio of liquid liabilities to GDP, calculated using the following deflation method: $\{(0.5) * [Ft/P_{et} + Ft-1/P_{et-1}]\} / [GDPT/P_{at}]$ where F is liquid liabilities, P_e is end-of period CPI, and P_a is average annual CPI. Bank sector size indicator evaluates the value of realizable obligations of banks and other financial institutions with respect to the economy of the country.

(2) PRIVATE CREDIT BY DEPOSIT MONEY BANKS to GDP (%): Private credit by deposit money banks to GDP, calculated using the following deflation method: $\{(0.5) * [Ft/P_{et} + Ft-1/P_{et-1}]\} / [GDPT/P_{at}]$ where F is credit to the private sector, P_e is end-of period CPI, and P_a is average annual CPI. Bank sector activity indicator evaluates the value of credits provided by commercial banks to the private sector with respect to the economy of the country. The bigger the value, the better.

(3) DEPOSIT MONEY BANK ASSETS to GDP (%): Claims on domestic real nonfinancial sector by deposit money banks as a share of GDP, calculated using the following deflation method: $\{(0.5) * [Ft/P_{et} + Ft-1/P_{et-1}]\} / [GDPt/P_{at}]$ where F is deposit money bank claims, P_e is end-of period CPI, and P_a is average annual CPI. Bank sector size indicator shows the general size of the bank sector with respect to the economy of the country.

(4) BANK DEPOSITS to GDP (%): Demand, time and saving deposits in deposit money banks as a share of GDP, calculated using the following deflation method: $\{(0.5) * [Ft/P_{et} + Ft-1/P_{et-1}]\} / [GDPt/P_{at}]$ where F is demand and time and saving deposits, P_e is end-of period CPI, and P_a is average annual CPI. Size indicator evaluates the value of bank deposits with respect to the economy of the country.

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Nataliia Stukalo, Anastasiia Simakhova

SOCIAL CONTOURS OF GREEN ECONOMY

The connection between the “green” economy and the social economy has been considered by promoting the welfare of the population in the conditions of the environment protection and rational use of natural resources. It has been shown that the “green” economy affects providing of social justice and responsibility, reduction of social inequality and stratification of society, fair access to limited natural resources. The connection between “the green” economy and health of population and education system has been studied. The effects of the “green” economy on the labor market have been described. The directions of social effect strengthening on the development of the “green” economy have been proposed.

Key words: social economy, “green” economy, development, education, health system, “green” employment.

Zaļās ekonomikas sociālā kontūra

Tika aplūkota saistība starp “zaļo” ekonomiku un sociālo ekonomiku, veicinot iedzīvotāju labklājību vides aizsardzības un dabas resursu racionālas izmantošanas apstākļos. Ir pierādīts, ka “zaļā” ekonomika ietekmē sociālā taisnīguma un atbildības nodrošināšanu, sociālās nevienlīdzības un sabiedrības noslāpošanās mazināšanu, taisnīgu piekļuvi ierobežotiem dabas resursiem. Tika pētīta saikne starp “zaļo” ekonomiku un iedzīvotāju veselību un izglītības sistēmu. Ir aprakstīta “zaļās” ekonomikas ietekme uz darba tirgu. Tiek piedāvāti sociālās ietekmes stiprināšanas virzieni “zaļās” ekonomikas attīstībai.

Atslēgas vārdi: sociālā ekonomika, “zaļā” ekonomika, attīstība, izglītība, veselības aprūpes sistēma, “zaļā” nodarbinātība.

Социальные контуры «зеленой» экономики

Рассмотрена взаимосвязь между «зеленой» и социальной экономикой через обеспечение благополучия населения в условиях защиты окружающей среды и рационального использования природных ресурсов. Показано в статье, что «зеленая» экономика влияет на становление социальной справедливости и ответственности, уменьшение социального неравенства и стратификации общества, честный доступ к ограниченным природным ресурсам. Изучена связь «зеленой» экономики с системой охраны здоровья и образования населения. Описано влияние «зеленой» экономики на рынок труда. Предложены направления усиления социального эффекта от развития социальной экономики.

Ключевые слова: социальная экономика, «зеленая» экономика, развитие, образование, система здравоохранения, «зеленая» занятость.

Introduction

One of the aims of sustainable development is development of the “green” economy. “Green” economy is characterized by the efficient use of natural resources, preservation of the environment and harmonious interaction of the man and the nature, as well as civilization development.

The relevance of the “green” economy study is strengthened by its economic effect through the conservation of limited natural resources, ensuring economic growth

based on environmental stability and orientation to the interests of future generations.

The concept of “green” economy in its different aspects was explored by various authors, including Hussien M. E., Alam R. Z., Siwar C. & Ludin N. A. (2016), Zenchanka Sž, Korshuk E. (2015) Mazilu M. (2013) D’Amato et al. (2017), Jacob K. (2015). Despite this, the issue of the development of the “green economy” from the social point of view has not been thoroughly investigated yet. The social impact of the “green economy” on the development of the society is primarily associated with the contribution to enhancement of population well-being at the expense of the environmental protection and rational use of natural resources. As one of the components of sustainable development, “green” economy affects ensuring social justice and responsibility, reducing social inequality and formation of social layers, fair access to the limited environmental resources. The aim of this article is to analyze the relations of the social development and “green economy”.

Interrelations of “green” and social economy

The economic effect of the “green” economy development is to increase the efficiency of production, the commodity market and the labor market, technological reorientation. The “green” economy promotes the innovations introduction and the “green” investments attraction.

The practice of international organizations emphasizes the need for transition to the “green” economy, which has not only economic, but also social substantiation. There are convincing arguments in favor of combining the efforts of the state and the private sector aimed at implementation of the transition to the “green” economy. In this regard, the state faces the tasks of creating equal conditions for production of the “green” products and services by means of the refusal from providing outdated subsidies, reforming environmental policy and creation of new incentives, strengthening the market infrastructure and market mechanisms, redistribution of the state investments and transition to the “green” public procurement. The private sector faces the challenge to understand and use the real possibilities, offered by the “green economy” in a number of key sectors, as well as to respond to reformation of the environmental policy by increasing the volumes of funding and investing in “green” projects.

Global metrics for the environment are counted by Environmental Performance Index (EPI). It ranks in 2018 180 countries on 24 performance indicators across 10 issue categories (Yale Center for Environmental Law & Policy, Yale University Center for International Earth Science Information Network, Columbia University, World Economic Forum 2018). Two fundamentals dimensions of Environmental Performance are environmental health and ecosystem vitality.

The Environmental Performance Index and its components determine the country’s ability to protect its environment in the current time and in the long term based on the national ecological system.

The comparison of the countries EPI Rankings and Scores in 2018 and 2010 showed that over the last 8 years there have been some changes. In 2018, the top 20

positions by EPI Rankings and Scores are held by highly developed countries of the world, both from the European region and from Asia (see table 1). In 2010, the top 20 places included developing countries – Costa Rica, Mauritius, Cuba, Colombia, and Chile. This information shows that the developed countries of the world have begun to pay attention to the environmental sphere and that's why they have increased their EPI Rankings since 2010. Despite their natural potential developing countries have lost their leading positions in the EPI since 2010. The same situation is with the 20 last positions by the EPI Rankings in 2018 and 2010. Countries that had last positions in EPI Rankings 2010 have increased their environmental performance over last 8 years. In 2018, the 20 last positions by EPI are held by developing countries of Asia, Africa and the Caribbean. According to EPI Rankings and Scores Ukraine in 2010 occupied 87 position (58.2), in 2018 109 position (52.87).

Table 1

EPI Rankings and Scores in 2018 and 2010 by first and last 20 countries

2018			2010		
Rank	Country	Score	Rank	Country	Score
1	2	3	4	5	6
1	Switzerland	87.42	1	Iceland	93.5
2	France	83.95	2	Switzerland	89.1
3	Denmark	81.60	3	Costa Rica	64.4
4	Malta	80.90	4	Sweden	86.0
5	Sweden	80.51	5	Norway	81.1
6	United Kingdom	79.89	6	Mauritius	80.6
7	Luxembourg	79.12	7	France	78.2
8	Austria	78.97	8	Austria	78.1
9	Ireland	78.77	9	Cuba	78.1
10	Finland	78.64	10	Colombia	76.8
11	Iceland	78.57	11	Malta	76.3
12	Spain	78.39	12	Finland	74.7
13	Germany	78.37	13	Slovakia	74.5
14	Norway	77.49	14	United Kingdom	74.2
15	Belgium	77.38	15	New Zealand	73.4
16	Italy	76.96	16	Chile	73.3
17	New Zealand	75.96	17	Germany	73.2
18	Netherlands	75.46	18	Italy	73.1
19	Israel	75.01	19	Portugal	73.0
29	Japan	74.69	29	Japan	72.5
161	Cameroon	40.81	144	Uzbekistan	42.3
162	Swaziland	40.32	145	Bahrain	42.0
163	Djibouti	40.04	146	Equatorial Guinea	41.9
164	Papua New Guinea	39.35	147	North Korea	41.8

Sequel to Table 1 see on the next page.

Sequel to Table 1.

1	2	3	4	5	6
165	Eritrea	39.34	148	Cambodia	41.7
166	Mauritania	39.24	149	Botswana	41.3
167	Benin	38.17	150	Iraq	41.0
168	Afghanistan	37.74	151	Chad	40.8
169	Pakistan	37.50	152	United Arab Emirates	40.7
170	Angola	37.44	153	Nigeria	40.2
171	Central African Republic	36.42	154	Benin	39.6
172	Niger	35.74	155	Haiti	39.5
173	Lesotho	33.78	156	Mali	39.4
174	Haiti	33.74	157	Turkmenistan	38.4
175	Madagascar	33.73	158	Niger	37.6
176	Nepal	31.44	159	Togo	36.4
177	India	30.57	160	Angola	36.3
178	Dem. Rep. Congo	30.41	161	Mauritania	33.7
179	Bangladesh	29.56	162	Central African Republic	33.3
180	Burundi	27.43	163	Sierra Leone	32.1

Sources: Yale Center for Environmental Law & Policy, Yale University Center for International Earth Science Information Network, Columbia University, World Economic Forum, 2018; Emerson, J., D. C. Esty, M.A. Levy, C.H. Kim, V. Mara, A. de Sherbinin, and T. Srebotnjak 2010.

The data from Table 1 indicated that developed countries of the world with developed social economies have also strong “green” economy.

The “green” economy in the social aspect is directly associated with such social areas as health care, ensuring a high quality of life, educational system and awareness of the population (Menshikov et al. 2017).

Preservation of the environment as one of the tasks of the “green” economy affects what air the person is breathing, what foods and water he consumes; all this has its impact on the health, sickness rate and average life expectancy of the population. To prove this, we will show in Table 1 the dynamics of the sickness rate of population of Ukraine within 2000–2016.

According to the data from Table 2, sickness rate of the population of Ukraine for the period of 2000–2016, decreased by 18%. Among the number of diseases by the disease type, diseases of the respiratory system rank first and make up 46% of all diseases in 2016. These diseases are directly related to the state of the environment, emissions of hazardous substances into the air. The development of the “green” economy will have a positive effect of improving the state of health of the Ukrainian population.

Table 2

**Sickness rate of population of Ukraine by types of diseases
in 2000–2016, thousand people**

Year	Total	Neoplasm	Diseases of nervous system	Diseases of cardio-vascular system	Diseases of respiratory system	Skin and subdermic diseases	Diseases of skeletal and muscular system and connective tissue	Diseases of urinogenital system	Inborn anomalies (developmental defects), deformations and chromosome disorders	Traumas, poisoning and some other effects of external factors
2000	33471	382	748	2338	14639	1996	1571	1939	62	2339
2001	33192	394	745	2384	14213	2008	1593	2049	59	2239
2002	32233	382	748	2370	13372	1950	1598	2039	57	2244
2003	32585	395	751	2386	13835	1915	1572	2077	54	2297
2004	32573	406	755	2498	13511	1917	1609	2153	55	2245
2005	32912	408	754	2430	13894	1936	1600	2185	53	2264
2006	32240	414	764	2431	13308	1906	1597	2172	53	2289
2007	32807	407	752	2437	13946	1952	1569	2132	51	2284
2008	32467	406	753	2478	13671	1911	1567	2136	51	2263
2009	33032	407	754	2423	14528	1890	1544	2140	52	2164
2010	33080	418	750	2390	14595	1921	1532	2138	52	2217
2011	32381	423	744	2346	14148	1881	1490	2095	55	2136
2012	31162	433	724	2318	13220	1852	1445	2047	54	2140
2013	31024	440	704	2256	13293	1856	1444	2046	55	2085
2014 ¹	26881	363	651	1880	11839	1570	1247	1756	48	1723
2015 ¹	26789	366	653	1844	11862	1567	1246	1779	48	1698
2016 ¹	27361	369	647	1826	12582	1564	1241	1761	47	1705

Source: Ukrstat 2017.

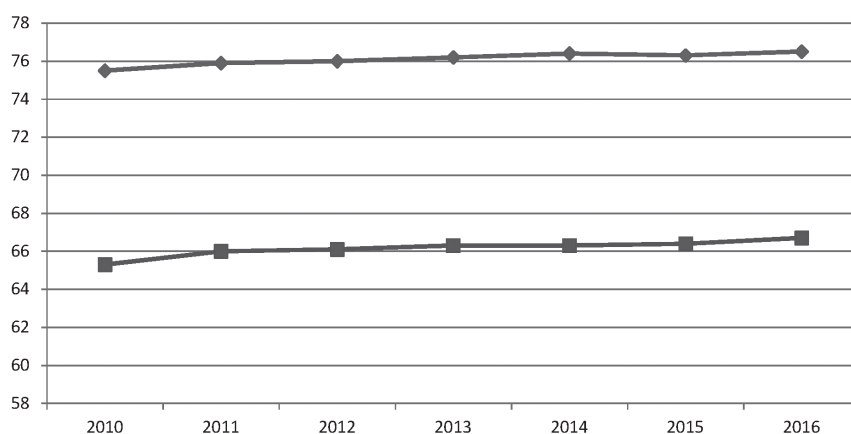
Lately, there has been a positive tendency of an insignificant growth of the indicator of the average life expectancy of the population in Ukraine (Fig. 1.).

From 2010 to 2016, the average life expectancy at birth for women in Ukraine increased by 1 year from 75.5 to 76.5 years of age. At the same time, the average life expectancy at birth for men increased by 1.4 years from 65.3 to 66.7 years of age. These indicators are not sufficiently high in comparison with other countries of the world, even with the neighbors of Ukraine. Thus, in Belarus the average life expectancy for women is 78.9 years of age, in Romania – 78.7 years of age, in Poland – 81.6 years of age, in Slovakia – 80.2 years of age, in Hungary – 79 years of age (Ukrstat, 2017, p. 581–582). We do not take into account highly developed countries of the world. The same situation is observed with regard to the average life expectancy of men: in Belarus – 68.6 years of age, in Romania – 71.5 years of age, in Poland – 73.5

years of age, in Slovakia – 73.1 years of age, in Hungary – 72.3 years (Ukrstat, 2017, p. 583–584). Given data indicate that one of the aspects of providing a longer average life expectancy is the active attention and activity on preservation and cleaning the environment from hazardous pollution.

Figure 1

Dynamics of average life expectancy at birth for females and males in Ukraine in 2010–2016



Source: Statistical Yearbook of Ukraine for 2017.

It is not a secret that today the environment is polluted by toxic substances from plants, factories, thermal power plants, cars, etc. Emissions of oxides of carbon, nitrogen, sulfur, heavy metals, lead compounds, construction dust and other poisoning substances into the environment contaminate the air, soil and water, resulting in severe diseases for the population (respiratory, of cardio-vascular system, cancer, congenital anomalies). Thus, in 2016, emissions of pollutants and greenhouse gases in the air were by 7.7% higher than in 2015, emissions of lead and its compounds into the air also increased by at 11.2%, of sulfur dioxin – by 29.6%, of cyanides – by 30.8%, etc. (Ukrstat, 2017). For Ukraine, the environmental problems in the country and their social aspect are rather acute due to the lack of funding of the ecological development. This is primarily related to the fact that 295.9 million tons of waste, of which only 84.6 million tons were utilized, were formed in Ukraine in 2016.

In addition to industry, one of the main polluters of the environment (causing deterioration of the health of people) is transport, including private. In cities and outside them, automobile transport consumes more than half the oil and generates almost a quarter of the world's CO₂ emissions (UNEP 2011). This involves significant costs both for power carrier and for cleaning up the polluted environment. Thus, it is necessary to pursue a policy of transport “greening” that combines the following basic components:

- exclusion or reduction of unnecessary travels, transfers due to transport planning and localization of production and consumption;

- transition to more eco-efficient, “green” kinds of transport such as public and non-automobile transport for passengers and railway and water transport for freight transportation;
- improvement of the used equipment and fuel in order to reduce their negative impact on the environment and human health.

The “green” economy involves not only health care, but also with one important element of the social sphere – education. The basic relationship is observed in the following direction: education provides awareness of school pupils and students of the need for efficient use of resources, caring attitude towards the areas (Stukalo et al. 2018). It is imperative that since his school years a little citizen should understand the main principles and postulates of the “green” economy and the importance of complying with them for the sake of ensuring the overall well-being.

Public awareness about the “green” economy leads to their environmental responsibility, to making the minds and actions of the population more ecologically friendly. The main thing is a desire and willingness to take responsibility for their own health, first of all, for the prospects of the environment.

Despite certain promotion of environmental protection and healthy way of life, unfortunately, the conscious attitude towards the environment of the population of Ukraine has not been formed yet. Thus, there is no active propaganda in the mass media on the importance of fulfilling the objectives of sustainable development.

In our opinion, a shortcoming in this process is the lack of compulsory subjects in schools and universities on the basics of sustainable development and “green” economy, the lack of permanent training for people of adult age, workers of different industries in regard to the “green” economy.

While studying such disciplines, there should be a search for optimization of ecological and economic effects of the use of primary and secondary resources taking into account the importance of the preservation of the environment (Dynka 2014).

In addition to formation of population awareness, connection of the “green” economy with higher education can be traced in the formation of competencies of “greening” of would-be specialists. Certainly, it is extremely important, because in terms of development of the “green” economy in Ukraine, there will be a structural realignment of the commercial complex, which will require appropriate educated professionals who will be able to apply the principles of the “green” economy to practice.

Moreover, foreign scientists see some possibilities for the “green” transformation of the socio-economic system (Narloch, Kozluk, Lloyd 2016):

- “green” investments (such as renewable power sources or in the social aspect in public awareness);
- “green” jobs;
- an increase in production and export of “green” goods and services.

The enumerated prospects concern all countries in terms of the formation of the “green” economy. The production of “green” goods and services will create a specific niche of “green” vacancies in the job market (see Table 3). There arises the question what these “green” jobs are. They are professionals in treatment of drinking and

wastewater, air, forest sanitars, specialists of waste management and recycling, environmental and energy consultants, specialists in renewable power industry, engineers, technicians, mechanics, “green” inventors, teachers and researchers in the field of “green” economy. There arises a certain problem because it is very difficult to distinguish between the “green” and “non-green” jobs and we must analyze the essence of the performed work. According to the materials of the XIX International Conference of the International Labour Organization (ILO) 2013, it was decided to refer to “green” jobs not only those that are involved in the production of “green” goods and services, but also those that make their production processes more “green” or uses natural resources more effectively (ILO 2013).

Table 3

**Changes in competencies and professions
with the development of “green” jobs**

Degree of change in competencies	Change of profession	Change of skills	Example
Absent	Absent	Absent or increasing training in existing profession	Bus driver of a bus, fueled by compressed natural gas
Low	Insignificant change of existing profession	Training at work or medium-term courses	Welder in production of wind turbines, organic farmer
Medium	Change or a new profession	Medium- or long-term courses	Power consultant, mechanic for electric car
High	New profession	Higher education or long-term courses	Technician on solar energy, biofuel technician, ecological designer

Source: Jacob 2015.

According to the data from Table 3, we can make the conclusion about importance of different courses, training and university programs for personnel retraining. That is why the relationship of the ‘green’ economy with the education sector is very important, since school years, it is necessary to form in little Ukrainians the new approaches and new perception of the importance of conservation and cleaning of the environment, as well as the skills of the “green” economy.

The studies of the German scientists have shown that the “green” economy will have a short-term, medium-term and long-term impact on the employment of the population of a country (Jacob 2015, p. 21):

1. A short-term impact on employment of the population is a direct impact of an increase in production and a demand for “green” goods and services. The environmental conservation policy is aimed at increasing prices for pollution and using resources, resource consuming productions will suffer, which will result in redundancy of employees. However, this negative effect will be offset by an increase in production in the alternative environmental industries with the employment increase

in them. There will be personnel re-training, where an important role will be played by the system of education.

2. A medium-term impact on employment will be felt after personnel retraining. New industries and markets for “green” products and services will develop. The export of these goods and services will rally as a result of the development of the world market for green products and services. Employment will be stable. However, the prices of power carriers, pollutant emissions will rise.
3. A long-term impact on employment of the population will occur as a result of innovative and technological and inter-industry changes. Labor productivity will increase and overall well-being will rise.

Thus, the relationship between the “green” economy and ensuring the well-being of the people is traced in the long-term prospects. It is not accidental, since poverty in itself is a significant manifestation of social injustice and inequality, caused by an unequal access to education and health care, unequal opportunities with regard to financial resources and incomes. One of the features of the “green” economy, as it was mentioned, is provision of social justice and an increase in separation and poverty of people, because it creates different opportunities for the socio-economic development of the country and decreases poverty.

It is obvious that for the developing countries and, to a certain extent, for the countries with transitive economy, one of the sources of income is natural resources and agricultural products. “Greening” of agriculture, especially private farmers, would contribute to decreasing poverty and increasing the inflow of investments in the field, on which the poor layers of population depend (UNEP 2011). Given this, development of organic farming as a private initiative, aimed at the development of the “green” economy and conservation of environment, is important. Moreover, it will increase the amount of food in the face of the current global food problem (Stukalo, Simakhova 2018).

One of the interesting ideas of the “green” economy is creation of “green” or environmentally friendly places. They are small settlements, which are distinguished by a greater density of population and housing development, existence of trade and entertainment infrastructure, special road planning in order to avoid the problem of traffic jams. These cities are characterized by high employment and productivity. Properly designed and accessible from the standpoint of the transport system areas with population density of 100–1000 people per hectare (up to 3000, depending on a country and region) make it possible to achieve effective organization of public transport and can be considered as a starting point for creation of “green” cities (Hasan, Ahmed, Sadiq 2010, p. 7). At a higher population density, creation of an infrastructure, including a network of streets, public transport, railways, water supply, sanitation and other utility service, costs per one inhabitant significantly are lower. In general, during the process of urban development, there is a possibility to take into account the problems of the social system and the health of residents in the city, which, as a rule, are optimally solved under conditions of “green” communities and areas. In order to help municipalities in realization of the potential of the “green” economy, it is also important to give them responsibility and increase their powers to perform the

role of observers in application of the national “green” legislation at the local level, with the right to introduce, when necessary, even more severe restrictions than those required at the national level.

In addition to the development of ecological farming and “green” cities, two basic directions to increase the population welfare involve the development of the “green” tourism, which also contributes to the inflow of foreign investments and the transition to alternative power sources, which will significantly reduce expenditures of the population for power resources, thereby increasing the level of people’s lives.

Conclusions

To sum up, based of the conducted analysis, it is possible to conclude that the main areas for strengthening the social component of the “green” economy include:

- Active propaganda of the principles of the “green economy” in mass media, big-boards, and advertising;
- Demonstration of basic principles and postulates of the “green” economy at trainings, master classes for the general public, as well as for individual entrepreneurs, government officials, representatives of public organizations;
- Lectures on the fundamentals of the “green economy” in schools to raise awareness of the population;
- Raising awareness of the population of Ukraine regarding the influence of the state of environment on health and the everyday actions of citizens for improvement of the state of environment;
- Formation of the niche of “green” jobs in the Ukrainian job market;
- Development of organic farming;
- Development of the new energy strategy of the country, based on the use of alternative energy sources, which will decrease the expenses of people for power carriers;
- Pursuing the policy of transport “greening”;
- Support of socially significant projects on “green economy” at all levels of public administration.

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TIESĪBZINĀTNE

Stanisław Sirko, Marzena Piotrowska-Trybull

SENSE OF SECURITY AMONG THE CITIZENS OF MUNICIPALITIES IN LIGHT OF THE MILITARY UNITS PRESENCE WITHIN THEIR TERRITORIES

In the source literature the concept of safety is variably defined, depending on the sphere and discipline of research science (sociology, economy, political sciences, security). The definitions of security most often stress the lack of threats, certainty and creating conditions for development, and the sense of security is viewed as a set of convictions, belief in possibility to obtain desired results. Sense of security is shaped i.a. under the influence of access to information and psychological factors that decide how a specific situation is perceived. In the analysis concerning the sense of security among the citizens of municipalities, references were made to the characteristics of local communities available in the source literature: shared territory, relations, common social interest, local sentiment and institutions called up to cater to the needs of citizens. Local institutions are responsible for shaping the following conditions: material well being, spiritual development, security and future perspectives, they cooperate in specific scope with state institutions, including the military units. These units act to ensure state security for the society in general and their location within given municipalities also strengthens local economic potential. The military units carry out defence and protective tasks, also engaging in relations with local entities in order to achieve this goal. Perception of the Army among the society, including its influence on the state security, is a subject of analyses conducted by various scientific institutions and research facilities, which includes the academy represented by the authors of the article. The issues presented in the paper are a continuation of the studies dealing with influence of the military units on local development in different aspects. Therefore the goal of the studies was formulated as follows: identifying influence of the military units on the sense of security among the citizens, specifying the concerns associated with presence of the military units within the municipalities and the assessment of the Army actions in a threat situation as well as assessment of the military units potential in the context of benefits resulting from presence within a municipality. In addition to other methods (analysis, synthesis) applied during the studies, the significant role was performed by the diagnostic poll method – CATI (Computer Assisted Telephone Interview). The studies aimed at collecting opinions of the citizens were carried out in November 2017 in urban municipalities: Braniewo, Brzeg, Chełmno, Hrubieszów, Słupsk and encompassed 600 participants selected proportionally to the total number of citizens in given municipalities. The respondents formulated opinions on the chosen aspects of security associated with presence of a military unit within their municipality. Moreover, the article refers to the results of the studies carried out by other authors and study results announced by the Public Opinion Research Center. The analysis was carried out with the use of computer programmes Excel and Statistica v. 13.1.

Key words: Security, sense of security, military unit, relations.

Pašvaldību iedzīvotāju drošības izjūta militāro vienību klātbūtnes viņu teritorijās apstākļos

Zinātniskajā literatūrā drošības jēdziens mainās atkarībā no zinātnes sfēras un disciplīnas (socioloģija, ekonomika, politikas zinātne, drošība). Drošības definīcijas visbiežāk uzsver apdraudējuma trūkumu, noteiktību un apstākļu radīšanu attīstībai, un drošības izjūta tiek skatīta kā pārliecību kopums, ticība iespējai gūt vēlamos rezultātus. Drošības izjūta veidojas, cita starpā, piekļuves informācijai un psiholoģisko faktoru, kas nosaka, kā tiek uztverta konkrēta situācija, ietekmē. Analizējot pašvaldību iedzīvotāju drošības izjūtu, autori atsaucās uz zinātniskajos literatūras avotos pieejamajām vietējo kopienu īpatnībām: kopīga teritorija, attiecības, kopējas sociālās intereses, vietējais noskaņojums un iestādes, kas aicinātas apmierināt vietējo iedzīvotāju vajadzības. pilsoņiem. Vietējās iestādes ir atbildīgas par šādu apstākļu veidošanu: materiālā labklājība, garīgā attīstība, drošība un nākotnes perspektīvas, tās sadarbojas ar valsts institūcijām, tostarp militārajām struktūrvienībām. Šīs vienības darbojas, lai nodrošinātu valsts drošību sabiedrībai kopumā, un to atrašanās pašvaldībās nostiprina arī vietējo ekonomisko potenciālu. Militārās vienības veic aizsardzības un drošības nodrošināšanas uzdevumus, kā arī iesaistās attiecībās ar vietējām struktūrām, lai sasniegtu šo mērķi. Armijas uztvere sabiedrībā, tai skaitā tās ietekme uz valsts drošību, ir dažādu zinātnisko institūciju un pētniecības iestāžu veikto analīžu priekšmets, tai skaitā akadēmijas, ko pārstāv raksta autori. Darbā aplūkoti jautājumi ir turpinājums pētījumiem par militāro vienību ietekmi uz vietējo attīstību dažādos aspektos. Tāpēc pētījumu mērķis tika formulēts šādi: militāro vienību ietekmes noteikšana uz iedzīvotāju drošības izjūtu, norādot bažas, kas saistītas ar militāro vienību klātbūtni pašvaldībās, un armijas darbību novērtēšana draudu situācijā, kā arī militāru vienību potenciāla novērtējums, ņemot vērā priekšrocības, ko rada klātbūtne pašvaldībā. Papildus pētījumā izmantotajām metodēm (analīze, sintēze), kas tika izmantota pētījumu laikā, nozīmīgu lomu pildīja diagnostiskās aptaujas metode – CATI (Computer Assisted Telephone Interview / Datorizētā telefonintervija). Pētījumi, kuru mērķis bija apkopot iedzīvotāju viedokļus, tika veikti 2017. gada novembrī pilsētu pašvaldībās: Braņevo, Bžega, Helmno, Hrubesova, Slupska, un aptvēra 600 dalībniekus, kas tika atlasīti proporcionāli kopējam konkrēto pašvaldību iedzīvotāju skaitam. Respondenti formulēja viedokļus par izvēlētajiem drošības aspektiem, kas saistīti ar militārās vienības klātbūtni pašvaldībā. Turklāt rakstā ir atsauce uz citu autoru veikto pētījumu rezultātiem un Sabiedriskās domas pētījumu centra publicētajiem pētījumu rezultātiem. Analīze tika veikta, izmantojot datorprogrammas Excel un Statistica v. 13.1.

Atslēgas vārdi: drošība, drošības izjūta, militārā vienība, attiecības.

Чувство безопасности для жителей муниципальных муниципалитетов в свете присутствия воинских частей на их территории

Безопасность, понимаемая как государство, свободное от страха и беспокойства, и состояние мира в контексте удовлетворения нынешних и будущих потребностей сообщества, живущего в определенном пространстве, является одной из основных целей этого сообщества. В местном сообществе развиваются отношения между его членами и местными учреждениями, которые позволяют действовать для удовлетворения потребностей жителей и решать возникающие проблемы. Одним из факторов, определяющих эффективное сотрудничество, является социальный капитал, основанный на доверии, соблюдении общепринятых норм и долговечности соединений. В контексте обеспечения безопасности важно, чтобы местное сообщество сотрудничало с учреждениями и службами, созданными для обеспечения внутренней и внешней безопасности государства и расположенными на территории коммун, повятов и воеводств. За последние годы вооруженные силы пользуются социальным доверием, и большинство респондентов воспринима-

ются как субъект, способствующий безопасности, хотя на местном уровне их влияние по сути косвенно. Исключением являются жители пограничных коммун, то есть Бранево и Хрубешув, в которых процент жителей, подчеркивающих важность армии в этом отношении, больше, чем в других муниципалитетах. Эти результаты соответствуют результатам опросов CBOS, проведенных на репрезентативной выборке поляков, которые, идентифицируя направления угроз безопасности государства, идентифицируют их с востока. Ссылаясь на опасения в связи с размещением армии на территории муниципалитетов, их жители указывают на возможные нападения во время войны, террористические нападения, а также на неблагоприятные ситуации, вызванные чрезмерным шумом, разрушением дорожной инфраструктуры, а также загрязнением окружающей среды. Большинство респондентов согласны с размещением воинских частей на их территории, включая расположение других армий НАТО на территории Польши. Интересным аспектом в контексте проведенных исследований является принятие для размещения баз НАТО на территории Польши, в том числе, в частности, на территории отдельных муниципалитетов. Предположительно, согласие на близкое соседство несколько ниже, чем в случае наличия союзных войск в стране (феномен NIMBY). Хотя расположение воинских частей, как показывают результаты предыдущих исследований, приносит конкретные социальные и экономические выгоды для муниципалитетов.

Ключевые слова: безопасность, ощущение безопасности, воинская часть, отношения.

Introduction

Threats that are a derivative of international situation, climate changes, technical defects and new occurrences cause unfaltering interest in the issue of security (Szmidtka, Koziół 2016); (Williams 2012); (Rechlewicz 2012); (Cieślarczyk 2009); (Dębowski, Jarmocha, Świdorski 2006). Applied in various spheres and contexts of knowledge, in the subjective objective aspect, referring to the public or personal sphere (Świniarski 2009), occurring in conjunction with other concepts, security is not perceived in a uniform manner. Its definitions emphasise the lack of threats, certainty and creating conditions for development (Szymczak 1978); (Stańczyk 1996); (Rosa 2008). In the objective perspective, it is viewed as external living conditions, whereas the subjective perspective deals with experience of individuals and their awareness of threats. Their sense of security, perceived as a state free of fear and anxiety, the state of peace in the context of satisfying present and future needs (Reber 2000), is a result of actions leading to satisfy these needs and an outcome of situation assessment. The perception seen (Nęcka, Orzechowski, Szymura 2006) as a subjective assessment of risk acceptance allows to control the situation (Bańka 2002).

Security might be considered on macro and micro scale. Results presented in this article refer mostly to a municipality¹ (Area and Population 2017) that is an institutional and political expression of local community (Leszczyński (ed.), Gumieniak, Owczarek, Mochocki 2013), occupying a specific geographical, social and economic area. In the article, the local community is equated with citizens of a municipality. Some of the researchers investigate into such community separately from a wider-scale social context, generally referring to permanent emotional connections and good relations between the individuals who make use of the foundation in the form of personal

acquaintances and direct contacts. While the others consider its relations with wider community, focusing attention on bonds through the lenses of its place or territory (Szlachta 2004); (Białyszewski, Dobieszewski, Janicki 2006); (Turner 2004). When writing about local communities, the authors of different publications refer to a collective set of people, space, bonds, actions and culture (Reber 2000); (Białyszewski, Dobieszewski, Janicki, 2006); (Starosta 2002); (Gilejko 2002), (Sowa 1989). The most often mentioned traits of local communities include: shared territory, interactions between the people occupying a specific territory, shared social interest resulting from functioning within such a territory, local sentiment and institutions called up to satisfy the citizens' needs (Białyszewski, Dobieszewski, Janicki, 2006); (Starosta 2002); (Gilejko 2002). In the context of interactions within a community, it is worth to quote F. Fukuyama, who, when analysing a varied level of social involvement in specific countries, noticed that one of the significant reasons of these differences is the level of trust shared between given market participants. The high trust level facilitates the shaping of social bonds at various levels of activity (local, regional, national), as well as makes the economic development more dynamic. Moreover, ability to cooperate allows a community to adapt to changes in the surrounding faster (Fukuyama 1997). Trust, following generally accepted standards and durability of interconnections between the entities, constitutes a foundation of social capital (Stańczyk 2000). Its occurrence at the local level enables spontaneous cooperation within a community in the form of associations and other groups to solve the problems² (Putnam 1995).

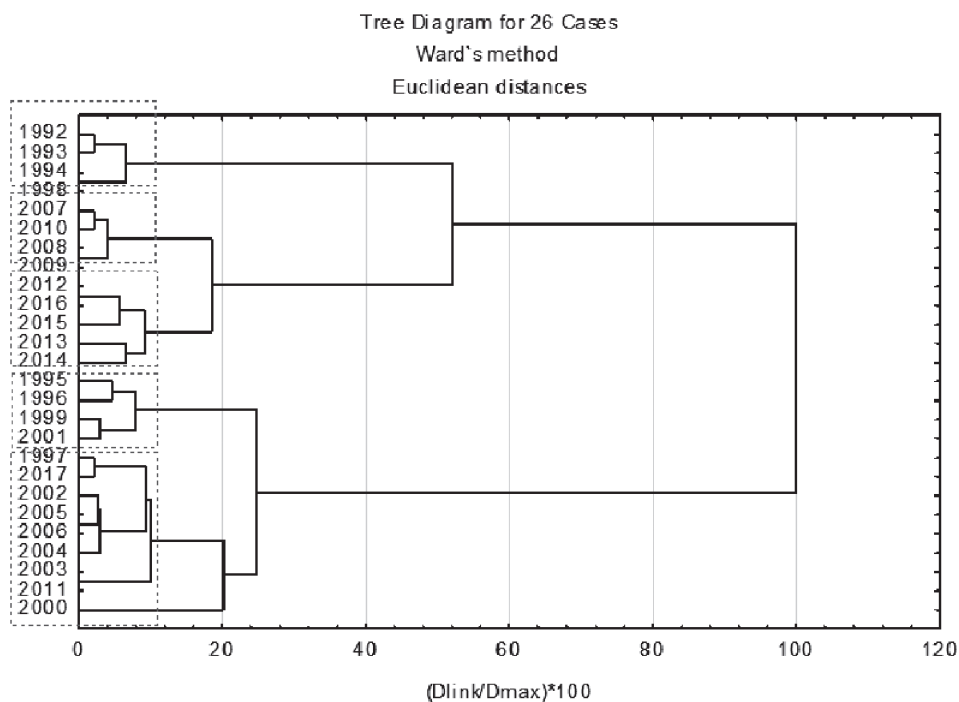
Local communities, acting through institutions for local development, shape proper conditions to facilitate: material well being (nourishment, housing, health, environment), spiritual development (leisure, education, culture, travels, access to information), safety and future perspectives (securing property, development of future generations) (Wojtasiewicz 1996) that allow them to achieve the overriding goal, which is to ensure the citizens their job places and income. As pointed out by L. Wojtasiewicz, "local development is a process of such changes occurring in a given, local, system, with consideration of the system-specific needs, preferences and hierarchies of values" (Wojtasiewicz 1996). One of such needs is ensuring safety. In the 1990s a research was carried out among municipal authorities to work out a basis for running spatial economy at a local level. The respondents were i.a. asked what a local development means to them. In their responses, they indicated creating new job places – average assessment at 4.41 points, using the local resources – average assessment at 4.31 points, development of new forms of activity – average assessment at 4.15 points, as well as citizen security – average assessment at 3.88 points (Guarino, Parysek, Kotus, Mierzejewska 1995). Security, as a feeling of lack of threats and stabilisation, is conducive to individual and collective development, therefore it is assigned with a relatively large significance. From the perspective of local community, it is crucial to distinguish between internal and external security. The first one, referring to the security of the constitutional order and following the public order, is shaping everyday existence of citizens. The feeling of security in a place of residence, work, study, exerts a positive influence on the psychical condition of individuals and raises the quality of living. The second one is conditioned by international situation. Stable situation in an interna-

tional surrounding of a state makes its citizens and local authorities to concentrate majorly on these elements that feel closer to them, in contrast to times of conflict or war (Piotrowska-Trybull 2013).

When speaking on the subject of security, the citizens, to some extent, may lean towards trust shown to institutions responsible for satisfying this need. One of them are the Armed Forces of the Republic of Poland that carry out important tasks in this scope. Their components, in accordance with operative needs, are deployed within the areas of specific municipalities, satisfying the citizens' need to live in peaceful and stable conditions. In light of information presented by the Public Opinion Research Center, the Poles, in years 1992–2017, had a positive opinion on the Army. In this period groups of similar assessments of this institution might be indicated (Figure 1).

Figure 1

Army assessment tree diagram, years 1992–2017³



Source: own study based on: *Opinie o instytucjach publicznych kraju* (Opinions on Public Institutions in the Country), BS/170/138/93, CBOS, Warsaw 1993; *Instytucje publiczne w opinii społeczeństwa* (Public Institutions in the Opinion of Society), BS/201/178/94, CBOS, Warsaw 1994; *Instytucje publiczne we wrześniu '95* (Public Institutions in September '95), BS/176/151/95, CBOS, Warsaw 1995; B. Wciórka (prep.), *Ocenadziałalnościwybranychinstytucji publicznych* (Assessment of Activities by Selected Public Institutions), BS/137/137/98, CBOS, Warsaw 1998; M. Strzeszewski (prep.), *Instytucje publiczne w opinii społecznej* (Public Institutions in Social Opinion), BS/104/2000, CBOS, Warsaw 2000; M. Wenzel (prep.), *Opinie o*

działalności instytucji publicznych (Opinions on Activities by Public Institutions), BS/168/2005, CBOS, Warsaw 2005; M. Wenzel (prep.), *Opinie o działalności instytucji publicznych* (Opinions on Activities by Public Institutions), BS/148/2007, CBOS, Warsaw 2007; M. Feliksiak (prep.), *Oceny instytucji publicznych* (Public Institutions Assessments), BS/108/2011, CBOS, Warsaw 2011; B. Badora (prep.), *Oceny działalności instytucji publicznych* (Public Institutions Activities Assessments), no. 124/2017, CBOS, Warsaw 2017.

A more detailed image of perceiving the Army in society, in the context of its influence on state security, might be obtained when analysing information presented in the report *Assessment of the State Security* prepared in 2014 by the Public Opinion Research Center on commission of the National Security Bureau⁴. The report shows that answers of the respondents coming from small cities indicated large influence of the Army on the state security, whereas the respondents from average size cities most often chose the answers suggesting that this influence is essential. Among the respondents from large cities, the distribution of answers (essential, large) was very similar. Irrespective of the educational background, the respondents most often indicated significant influence of the Army. Similar answers were given by the persons from the families where income per capita was between PLN 751 and PLN 1000 and above PLN 1500. Among the other respondents, whose income was within the range to: PLN 500, PLN 501-750, PLN 1001-1500, the most predominant answers indicated large influence of this institution on the state security.

Referring to the results of the studies conducted by the authors of the article in years 2010–2013 among the citizens of 17 municipalities in the country⁵ (Sirko, Piotrowska-Trybull 2013), the study participants viewed the presence of the Army in various situations of threat as increasing the level of civil population security. Near half (48%) of the surveyed citizens declared that they feel safer when there is a military unit within their municipality, although in most of the cases an influence was not felt directly. The responses indicating such a dependence were most often provided in the municipalities located close to the borderline (74.0% in Hrubieszów municipality, 64.0% in Braniewo municipality, where joint patrols of the Police, the Army and the Municipal Police were organised). The opinions shared by the respondents from the municipalities located closer to the centre of the country indicated that the Army has no influence on the sense of security of the citizens. In 2017, the citizens from five of these municipalities were asked to share their opinions on influence of a military unit on the social and economic situation in a municipality. The results associated with influence of the Army on the sense of security felt by the citizens of these municipalities are presented further on.

Studies organization

Data for the analyses was obtained during the surveys conducted in November 2017, in five urban municipalities: Braniewo, Brzeg, Chełmno, Hrubieszów, Słupsk⁶. 600 persons expressed their opinions, drawn from specific municipalities commensurately to a number of citizens. The samples included division of the surveyed into

sex and age (18–34, 35–54, 55–75, over 75), taking into account the proportions of the citizens in specific municipalities. Among the surveyed, the biggest group were the professionally active persons (49%). The respondents also included retirees and pensioners (38.3%), persons receiving education (students/pupils 3.2%) and the unemployed (9.5%). The surveyed had the following educational background: higher (38.8%), secondary (46.5%), vocational (10.7%) and primary (4.0%).

The article contains the results of own analyses conducted on the basis of data obtained from ASM and information published in the announcements of the Public Opinion Research Centre. The analyses were conducted using the computer programmes Excel and Statistica v. 13.1. The presented descriptive statistics measures are a derivative of the measurement scales presented in the survey questionnaire. To verify the statistical hypotheses an χ^2 test was applied. The results presented in the article were statistically significant at the level of 0.05. Figures 1, 2, 3 present the effects of cluster and correspondence analyses⁷ (Stanimir 2005); (Stanisz 2007).

Macro and micro scale security in the opinions of citizens

Halfway through the last decade of previous century most of the respondents surveyed by the Public Opinion Research Center (79%) was critical about the issue of security. During that period a disproportion in its assessment at the level of state and municipality was visible. The difference could be explained by the fact that the respondents expressing their opinion on state-wide security used information from the media, and not their own direct observations (Poczucie bezpieczeństwa [Sense of Security] 1995). Similar problems are also pointed out by K. Kowalczyk, claiming that security assessment at the local level, to some extent, affects the opinions of the respondents on state-wide security (Kowalczyk 2015). At the beginning of the new century, the situation started to change, leading to bringing back the proportions of 2007. In 2017 most of the Poles (89%) surveyed by the Public Opinion Research Center were convinced that they live in a safe country and their closest neighbourhood is a peaceful place (95%) (Strzeszewski 2008); (Kowalczyk 2015); (Głowacki 2017).

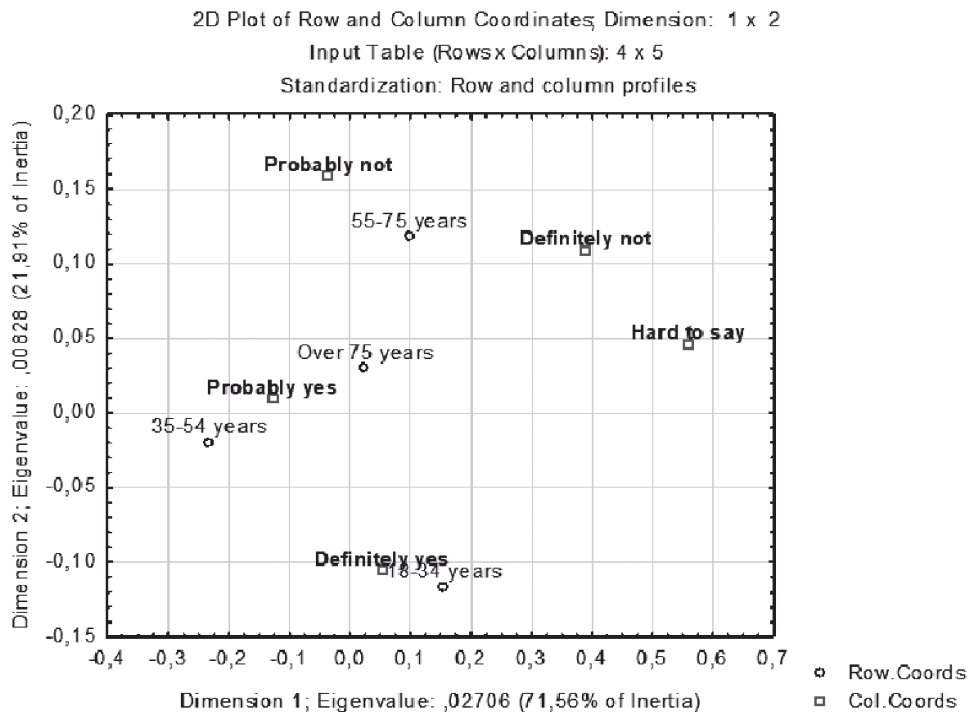
In the municipalities where the surveys were carried out a smaller percentage of respondents than in the studies of the Public Opinion Research Center (72.85) stated that Poles may feel safe. A different opinion on this matter was expressed by every fourth of the respondents (25.7%). The remaining ones (1.5%) could not take a decisive stand on this issue. A large percentage of positive answers (decisively and rather yes) was noted among the surveyed in each of the municipalities (Braniewo 78.3%, Brzeg 78%, Chełmno 69.9%, Hrubieszów 70.3%, Słupsk 71.3%). Among the respondents there were 75.6% of males and 70.8% of females, working persons (77.2% of the surveyed from this group), unemployed (75.4%) and pensioners (64.4%). In each of the age groups, the percentage of the persons claiming that Poles may feel safe was high, yet diminishing with age (18–34 – 80.4%, 35–54 – 75%, 55–75 – 66.1%, over 75 – 64.9%) (statistically significant co-dependency at $p < 0.05$).

Opinions of the citizens of municipalities taking part in the study that referred to the issue of security at the level of a municipality differed. Three out of four of the

participants (76%) stated that the municipality where they live is a safe place. Among them there were 69.9% from Braniewo municipality, 70.3% from Hrubieszów municipality, 71.9% from Słupsk municipality, 83.3% from Brzeg municipality and 86.3% from Chełmno municipality. Such an opinion was expressed by 74.8% of the surveyed males and 76.9% of the surveyed females. These were the persons belonging to each age group (the majority – 81.8% – at the age of 35–54, the least amount – 70% – at the age of 55–75) – figure 2, no matter their professional situation. The greatest percentage of such answers was noted among the working persons (81.3%), the smallest one among the unemployed (68.4%). The higher the educational background of the respondents was, the higher was the percentage of the persons claiming that their municipality is a place where you can feel safe (primary education – 62.5% and higher – 82.0%).

Figure 2

Security assessment in a municipality, age of the respondents considered



Source: own study.

Most of the surveyed (71.7%) claimed that geographical location of a municipality where they live exerts an impact on security of its citizens. Such an answer was given by 56.5% of the surveyed from Braniewo municipality, 62.2% from Hrubieszów municipality, 72.5% from Słupsk municipality, 73.5% from Brzeg municipality and 74.0% from Chełmno municipality. Dependence between municipality location and

security of its citizens was noticed by 72.9% of the surveyed males and 70.8% of the surveyed females. The greatest amount of such persons (74%) was among the age group of 35–54, the smallest (68.9%) – among the age group of 55–75.

Opinions of the surveyed citizens of the municipalities regarding the security of Poles corresponded with their responses concerning the involvement of allies in defence of the Polish borders in a situation of a threat (statistically significant co-dependence at $p < 0.05$). Such a behaviour of allies was expected by 61.2% of the respondents (54.1% from Hrubieszów municipality, 60.6% from Słupsk municipality, 60.9% from Braniewo municipality, 63.0% from Chełmno municipality and 63.6% from Brzeg municipality). A large group of the respondents (31.5%) had a different opinion on this matter, the remaining ones (7.3%) could not take a decisive stand. Allies' assistance in a situation of threat was pointed out by 56.2% of the surveyed males and 64.9% of the surveyed females. The respondents were of various ages (18–34 – 60.1% from this group, 35–54 – 60.4%, 55–75 – 64.5%, above 75 – 56.1%). Such persons were most vastly represented in the group with primary education (66.7%) and most scarcely in the group with secondary education (59.9%).

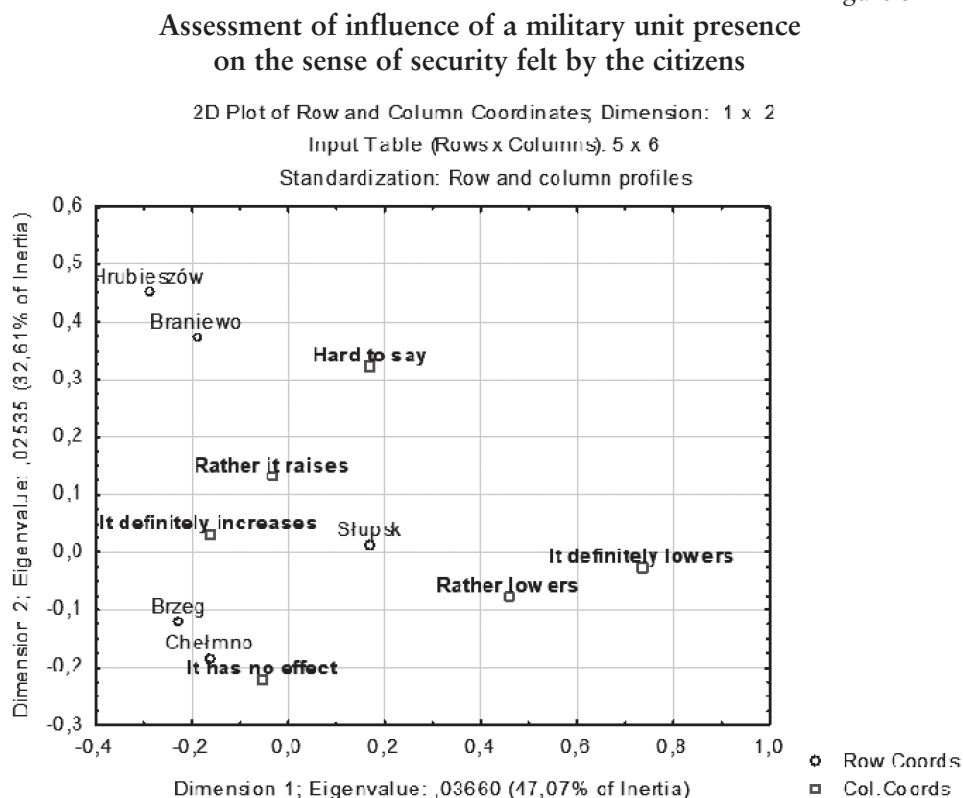
Army assessment in ensuring citizens security

In the opinions of most of the respondents (76.2%), armies of other NATO countries should station in Poland⁸ (Badora 2017). Such an answer was given by 81.1% of the respondents from the Hrubieszów municipality, 78.3% from Braniewo municipality, 77.6% from Słupsk municipality, 76.7% from Chełmno municipality and 70.5% from Brzeg municipality. The necessity of the NATO armies presence in Poland was noticed by 79.8% of the surveyed males and 73.4% of the surveyed females. As a result of the conducted analyses it was determined that along with age percentage of advocates of NATO presence in Poland grew (18–34 – 66.7% from this age group, 35–54 – 78.1%, 55–75 – 80.9%, above 75 – 82.5%) (statistically significant co-dependency at $p < 0.05$). These included working persons (72.8% of professionally active respondents), unemployed (70.2%), persons receiving education (68.4%) and retirees (82.6%) having different educational background.

Slightly more than half of the surveyed (57.0%) assessed that presence of a military unit in a municipality where they live causes them to feel safer, which, in light of previous results, evokes some reflections. Others (28.0%) claimed that presence of the Army has no influence on the feeling of security of municipality citizens or lowers it (10.3%). Others (4.7%) could not take a stand on this matter. Positive influence of a military units' presence on the sense of security of citizens was stressed by 82.6% of the surveyed from Braniewo municipality, 75.7% from Hrubieszów municipality, 57.5% from Chełmno municipality, 56.8% from Brzeg municipality and 53.1% from Słupsk municipality (fig. 3). Among these respondents there were 54.7% males and 58.8% females. It was determined that along with age of the surveyed, a percentage of those who noticed a positive impact of the Army on the sense of security felt by the citizens of municipalities increased (18–34 – 53.6% in this group, 35–54 – 56.8%, 55–75 – 57.9%, above 75 lat – 64.9%) (statistically significant co-dependency at

$p < 0.05$). Such an opinion was expressed by the working persons (51.7% among them), unemployed (54.4%) and retirees (60.95). In the group having primary education such answers were given by 66.7%, in the group having vocational education – by 56.3%, having secondary education – by 62.0% and having higher education – by 50.2%.

Figure 3



Source: own study.

Opinions of the surveyed regarding presence of the Army within their municipalities were divided. According to most of the participants (46.7% of all the respondents) no changes were necessary. The others (35.0%) would expect increased numbers of the stationed Army. Minority claimed that they would expect a decrease in personnel numbers (3.8%) or the Army to leave a municipality (3.7%). Some of the surveyed (10.8%) could not provide a clear-cut answer in this respect⁹ (Piotrowska-Trybull 2013); (Sirko, Piotrowska-Trybull 2013); (Stenberg, Rowley 1993); (Andersson, Lundberg, Sjöström 2007). 24.3% of the surveyed from Hrubieszów municipality, 26.1% from Braniewo municipality, 42.5% from Chełmno municipality, 48.5% from Brzeg municipality and 50.8% from Słupsk municipality expected the Army personnel numbers to stay at the current level. Increase in the Army personnel numbers would

be well received by 73.0% of the respondents from Hrubieszów municipality, 65.2% from Braniewo municipality, 37.0% from Chełmno municipality, 34.1% from Brzeg municipality and 28.7% from Słupsk municipality. A couple of percent of respondents from Brzeg, Chełmno and Słupsk municipalities claimed that the military units presence in a municipality should be limited or that they should be withdrawn altogether. A large group of males (42.3% among them) and half of the female study participants, the most often indicated that the Army personnel numbers in municipalities should stay the same. Such actions were expected by a relatively high, and simultaneously comparable, percentage of the surveyed from each of the age groups (18–34 – 47.6% from this group, 35–54 – 43.8%, 55–75 – 49.7%, above 75 lat – 43.9%). From the standpoint of occupational and educational background of the respondents the situation was not so unambiguous anymore. A large percentage of persons with secondary education (43.7%) and occupational education (42.2%) expected the increase in the Army numbers, whereas a large percentage of the surveyed with higher (56.7%) and primary (54.2%) education proposed not to change the Army numbers.

In every municipality, among the study participants, there were persons (56.5% of all the respondents from Braniewo municipality, 78.8% from Brzeg municipality, 63.0% from Chełmno municipality, 37.8% from Hrubieszów municipality, 27.2% from Słupsk municipality) who witnessed Army help provided to civilians in threat situations. They included males (47.3% among all males) and females (42.3% among them), persons at different ages (18–34 – 45.8% from this group, 35–54 – 49.5%, 55–75 – 36.1%, above 75 – 52.6%), working persons (48.3% from this group), retirees/pensioners (43.0%), persons receiving education (36.8%) and unemployed (35.1%), having various education.

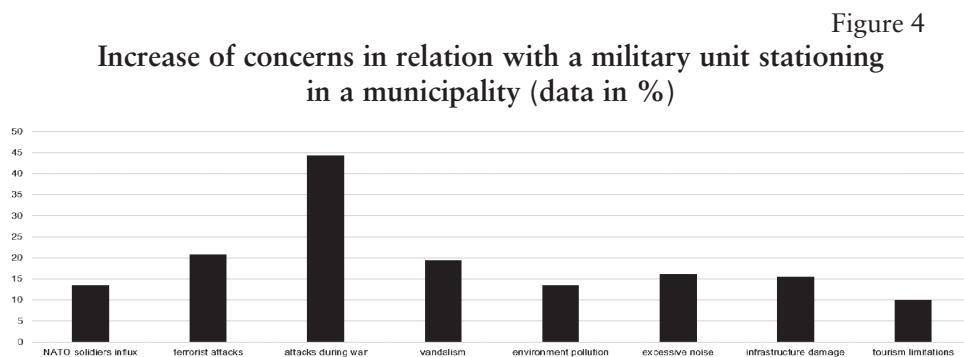
The decisive majority of the surveyed (96.6%) who observed the Army helping civilians in threat situations assessed these actions positively. A large group (68.3%) among the witnesses of such activities assessed that a military unit's presence in a municipality is conducive to increase the sense of security of its citizens. The others (5.2%) claimed that the Army presence lowers the sense of security, has no effect at all (21.0%) or could not take a clear stand (3.4%).

Considering positive attitude of the respondents to NATO forces deployment in Poland, it is not surprising that a large number of them (66.7%) would be happy with presence of these armies within the territory of a municipality¹⁰ (Paloyo, Vance, Vorell 2010).

A number of indications in specific municipalities was varied, since such an answer was given by 71.2% of the respondents from Chełmno municipality, 70.3% from Hrubieszów municipality, 66.3% from Słupsk municipality, 65.2% from Braniewo municipality and 64.4% from Brzeg municipality. This was a reason for satisfaction for 72.1% of the surveyed males and 62.6% of the surveyed women. The greatest percentage of the satisfied persons (73.4%) was noted in the group of the respondents at middle age, the smallest one (57.9%) in the group of the oldest individuals. Among the working persons, retirees/pensioners and persons receiving education, this value fell within the range of 63–68%.

Perception of threats resulting from presence of the Army in a municipality

During the studies the surveyed were asked about their concerns in relation with a military unit being stationed in their municipality¹¹. Among the situations they were presented with¹² (Cunningham, Klemmer 1995); (Piotrowska-Trybull 2013), considered in separate terms, the highest percentage of the respondents indicated in their answers a large or a very large level of fear of attacks in the case of a military conflict (44.3%) – figure 4. References to each of them are presented further on.



Source: own study.

The respondents in specific municipalities, to a varied degree, feared the influx of soldiers from other NATO armies. The greatest percentage of such answers was noted in Braniewo municipality (21.7 % of all the respondents from this municipality). In the remaining municipalities percentage of such indications was slightly lower (Ślupsk 14.0%, Hrubieszów 13.5%, Chełmno 12.3%, Brzeg 11.4%). It was noticed that the older the respondents were, the higher was the percentage of those who feared the influx of NATO soldiers in specific age groups (18–34 – 8.3% from this group, 35–54–12.5%, 55–75 – 16.9%, above 75 – 21.1%)¹³ (statistically significant co-dependency at $p < 0.05$). It was also determined that a percentage of selections indicating the presented concerns decreased as the level of education of the surveyed increased (statistically significant co-dependency at $p < 0.05$).

Opinions of the respondents regarding security are affected by perception of a terrorist threat¹⁴ (Roguska 2014); (Feliksiak 2015); (Feliksiak 2016). Specific municipalities recorded a different percentage of those who feared terrorist attacks as a consequence of a military unit being stationed in their municipality. Among the surveyed from Braniewo municipality there were 34.8% of such persons, from Hrubieszów municipality – 27.0%, from Ślupsk municipality – 21.8%, from Brzeg municipality – 21.2%, from Chełmno municipality – 8.2%. Such a possibility was indicated by 15.1% of the male study participants and every fourth female participant (25.2%). Such persons were represented in each of the age groups, the highest one (24.5%) among the middle-age persons. As a result of the analyses it was determined that the younger

the respondents were, the greater was the percentage of those who feared terrorist threats to a small extent (18–34 – 68.5% from this group, 35–54 – 58.9%, 55–75 – 58.5%, above 75 – 50.9%) (statistically significant co-dependence $p < 0.05$). Such answers were given by the respondents irrespective of their professional situation and educational background. However, it was discovered that the higher the level of education was, the bigger the percentage of those who did not pay huge attention to the discussed threat (primary 45.8% from this group, vocational 54.7%, secondary 58.8%, higher 66.1% (statistically significant co-dependence at $p < 0.05$).

As it has been already pointed out, the greatest concerns of the surveyed were associated with attacks in the case of a military conflict. The highest percentage of such persons was recorded in the municipalities located close to the border (Słupsk 52.2% of the surveyed from this municipality, Hrubieszów 51.2%, Braniewo 47.8%), it was lower in the remaining ones (Brzeg 33.3%, Chełmno 23.3%). Such a threat was noticed by the surveyed in each of the age groups (the greatest amount of such persons was recorded in the middle-age group – 53.2%). At the same time, it was determined that the younger the respondents were, the higher was the percentage of those who were less concerned about this matter (18–34 – 41.1% from this group, 35–54 – 38.0%, 55–75 – 26.8%, above 75 – 26.3%) (statistically significant co-dependence $p < 0.05$). Some of the respondents, irrespective of their educational background, feared attacks following a military conflict outbreak. In the course of further analyses, it was observed that the higher the education held by the respondents, the higher was the percentage of the ones paying attention to this threat (primary 8.3%, vocational 28.1%, secondary 32.3%, higher 41.2%) (statistically significant co-dependence $p < 0.05$).

The cases of vandalism¹⁵ (Thanner, Segal 2008) were pointed out by the surveyed in each of the municipalities (32.4% of the surveyed from Hrubieszów municipality, 28.8% from Brzeg municipality, 21.7% from Braniewo municipality, 17.8% from Chełmno municipality and 14.6% from Słupsk municipality) – more often by females (23.1% among them) than males (14.7%). Among the respondents, in each of the age groups there were persons who did not stay indifferent to this threat. However, it was determined that the younger the surveyed were, the higher was the percentage of persons among them who did not see the issues associated with vandalism (18–34 – 70.3% from this group, 35–54 – 65.6%, 55–75 – 59.0%, above 75 – 49.1%) (statistically significant co-dependence at $p < 0.05$). The higher the education level of the respondents was, the lower was the percentage who applied importance to the above issue.

In each of the municipalities, there were persons who paid attention to the problem of environment solution¹⁶ (<http://cswldrawsko.wp.mil.pl/pl/17.html>) resulting from using the military equipment (in Braniewo municipality 21.7% of the surveyed, 16.7% in Brzeg municipality, 16.2% in Hrubieszów municipality, 12.2% in Słupsk municipality and 9.6% in Chełmno municipality). It was pointed out by the respondents at every age (6.0% from the group of the youngest surveyed, 19.3% from the group of the oldest respondents). At the same time it has been determined that the younger the respondents were, the highest was the percentage of those who did not perceive such a threat (18–34 – 65.5% from this group, 35–54 – 62.0%, 55–75 – 61.2%, above

75 – 45.6%) (statistically significant co-dependence at $p < 0.05$). Responses of the surveyed in this scope were also differentiated due to their education and professional situation. The highest percentage of the answers indicating the possibility of environment pollution was among the group with vocational education (21.9%) and among the unemployed (35.1%), and the smallest one among the respondents with higher education (10.3%) and among students/pupils (5.3%).

What might turn out burdensome for the citizens is noise¹⁷, which is a consequence of using military equipment when the soldiers carry out their tasks. Percentage of the answers indicating difficulties for the citizens of municipalities was different in each one of them (8.1% of the surveyed in Hrubieszów municipality, 8.7% in Braniewo, 12.3% in Chełmno, 16.1% in Słupsk and 22.0% in Brzeg). Difficulties associated with noise were pointed out by the respondents at each age (the greatest percentage, 18.8%, was noted in the group of 35–54, the smallest one, 14.9%, in the group of the youngest respondents). Accounting for the respondents' educational background, a difference in selections might be also pointed out (the highest percentage, 21.9%, recorded among the persons with vocational education, the smallest one, 4.2%, among the persons with primary education).

Using the military equipment may also lead to destruction of road infrastructure in a municipality. Such a threat was indicated by 26.1% of the respondents from Braniewo municipality, 18.2% from Brzeg municipality, 16.4% from Chełmno municipality, 13.7% from Słupsk municipality and 13.5% from Hrubieszów municipality. This threat was pointed out by females (21.1% among them) more often than males (8.1% of the participating males). These were the persons at various ages (a dozen or so percent in each age group), mostly with primary educational background (33.3% from this group).

Noise, environment pollution and road infrastructure destruction are not conducive to tourism within a municipality. Limitations in this scope were emphasised by 12.2% of the surveyed from Słupsk municipality, 9.8% from Brzeg municipality, 5.4% from Hrubieszów municipality, 4.4% from Braniewo municipality and 4.1% from Chełmno municipality. This threat was equally noticed by the surveyed males (10.5% among them) and females (9.7%). It was determined that the higher the level of the surveyed educational background was, the lower was the percentage of those who perceived such a threat (primary 20.8%, vocational 15.6%, secondary 9.3%, higher 8.2%) (statistically significant co-dependence at $p < 0.05$).

Conclusions

Security viewed as a state free of fear and anxiety and peace in the context of satisfying current and future needs of a community living within a particular space is one of the main goals of such community's actions. In a local community, its members and local institutions coin relations allowing acting to satisfy the needs of citizens and solving the arising issues. One of the factors conditioning efficient cooperation is a social capital based on trust, following generally accepted standards and durability of relations.

In the context of ensuring safety it is crucial for a local community to cooperate with institutions and services called up to ensure internal and external state security, located within municipalities, districts and voivodeships. One of such institutions ensuring safety are the Armed Forces. Over the last couple of years, the Armed Forces have enjoyed social trust and most of the surveyed perceive them as an entity conducive to ensuring safety, although at the local level their influence is indirect. Citizens of near-border municipalities, i.a. Braniewo and Hrubieszów, where the percentage of citizens stressing military significance is higher than in other municipalities, are an exception in this respect. These results correspond with the study results of the Public Opinion Research Centre conducted with participation of a representative group of Poles who, when determining threats to state security, point to the east.

With reference to the concerns associated with the Army presence within municipalities, their citizens mention possible attacks during war, terrorist attacks and also unfavourable situations resulting from excessive noise, destruction of road infrastructure, as well as pollution to the environment.

Most of the surveyed accept presence of the military units within their territories, they are also in favour of other NATO armies being stationed within Poland. What is interesting in the context of these studies, is the acceptance of the NATO bases within the territory of Poland, especially within specific municipalities. Acceptance for close vicinity is probably slightly lower than in the case of allied forces in the country (NIMBY) – although the location of military units, as the results of present studies indicate, brings specific social and economic benefits for municipalities.

Notes:

- (1) As of 1 January 2017 Poland included 2478 municipalities.
- (2) R. D. Putnam carried out an analysis of social capital differentiation (activity of citizens in various associations and a tradition of grouping together) in terms of their influence on development of south and north Italy. Concluding, the author stressed that the accumulated social capital is the decisive factor in the success of north Italy.
- (3) Cluster analysis may be used to detect structures in a set of data. Its idea is to divide objects to form a group of similar elements that are not similar to objects from other groups at the same time. Probability is viewed in terms of distance. The bigger the difference between two objects, the more dissimilar they are. At the onset each object is a separate cluster. Next, the closest objects join together to form new clusters until they form one cluster. When dealing with structure of the researched collective, the grouping allows to detect regularities, conduct data set reduction, facilitate further analysis. More in (Stanisz 2007).
- (4) In the quoted report, the obtained data was presented from the angle of the following variables: sex, age, place of residence, education, social and occupational group, work, income per capita, assessment of own material conditions, participation in religious practices.
- (5) 856 people took place. The surveys were also presented to 47 representatives of territorial authorities in the municipalities where the military units were withdrawn from in years 1990–2009, and to 26 representatives of territorial authorities where the military units were stationed in 2010.
- (6) ASM company carried it out with the use of CATI (Computer Assisted Telephone Interview) on commission of the authors. The questions to the respondents were prepared by the authors.

(7) They are interpreted on the basis of the location of points representing the categories of specific variables. The points far away from the projection centre bring in the greatest contribution to reject the hypothesis on variables independence. Close location of points belonging to different variables indicates a high probability of their profiles. To give a better illustration, location of some points was marked using the dotted line.

(8) As stems from the studies conducted by the Public Opinion Research Center, only after 2005, acceptance of permanent presence of the NATO armies within the territory of Poland significantly increased. In 2017, 65% of Poles claimed that armies of other NATO countries should station in Poland.

(9) Structure and scope of employment in a military unit, the tasks it carries out, intensity of cooperation with other entities in a municipality, in addition to external elements, i.e. town size and town character – a city, a country, decide on the role and place of the Army in a local community. Currently, presence of the Army may contribute to: improving migration balance, development of cooperation with schools and shaping of patriotic attitudes among children and youth, creation of new job places, ensuring stability of demand in a municipality and stability of income to a local budget, etc.

(10) Experiences of other countries in the scope of localisation and liquidation of the military bases in specific spots indicate the occurrence of positive effects in the form of an increase in employment, income, revitalisation at the real estate market in the Army presence and in the case a military unit liquidation we notice a collapse in demand – decrease of income – worsening of situation at the labour market – change of consumption patterns. At the same time, in the source literature it is stressed that an influence of a military base on development of a given territory depends on the level of its integration with local surrounding.

(11) Referring to the results presented earlier, in the eyes of some of the respondents presence of a military unit contributed to lowering of the sense of security.

(12) The surveyed could point out different concerns. These included (single indications): e.g. decrease in land prices, barriers in business development, obstacles for the citizens. Lowering of land and real estate prices following the Army's exit from a municipality is a phenomenon pointed out in the source literature. Lowering of the population numbers following the Army withdrawal from a specific location results in increase of supply in housing in relation to the demand. Real estate prices decrease. Financial situation of those who took credits when buying a real property deteriorates. Number of uninhabited prices grows. It is worth to stress that a kind, technical condition and location of the post-military possessions generates variable results at a real estate market in specific locations. The studies conducted in 2010–2013 indicated that the municipalities within the areas where military units are stationed are worried about their closing also due to the difficulties in developing post-military possessions. Such concerns were articulated in Suwałki, Hrubieszów and Braniewo.

(13) In the context of the obtained results, a reference might be made to NIMBY (Not In My Back Yard) phenomenon consisting in raising objection against investments in close vicinity while simultaneously restraining from negating that it is necessary at all. Therefore, sometimes greater concerns of the citizens might appear when an investment location, in this case the NATO bases, applies to their municipality than the one executed far away from their place of residence.

(14) As results from the studies presented by the Public Opinion Research Center, from 2010 to the first half of 2016 the amount of people seeing a real terrorist threat in Poland was growing (increase by 27%). Others claim that the issue is exaggerated (decrease by 9% from 2010 to the first half of 2016) or that there is a lack of real threat in the country (decrease by 13%). Concerns about an attack more often were voiced by females and the elderly. Both in

2013, in 2015 and in the first half of 2016, the majority of the respondents assessed preparation of authorities and institutions for preventing terrorist attacks negatively.

(15) M.H. Thanner and M.W. Segal indicated that it is not the presence of the military within a given area but rather its liquidation may be the cause of vandalism – despite, as they stressed, the Army having limited scope of tasks to ensure internal security. When conducting 1995 studies following the Army withdrawal from Fort Richie in Maryland, they noted an increase in acts of vandalism, petty thefts, destruction of property and drug abuse.

(16) Results of the studies conducted by the authors in years 2010–2013 indicated that the military units were perceived by local authorities as neutral entities in the context of environment and as the ones acting pursuant to law, since the military complexes and the places of military practice are subject to control of the State Inspectorate for Environment Protection. Military units' leaders, to rise up to the requirements of environment protection, are entitled to interrupt training in the case of violating security, ecological and fire threat, to agree with leaders of the training armies on the areas excluded from training for environment protection reasons, to specifically determine the regions to carry out fortifying works and to execute their liquidation following the exercises, to mark the roads to be used by caterpillar and wheeled vehicles, to require the training armies to remove material damage and to repair ecological damage, to remove the sources of environmental threats and to ensure efficient functioning of the environment protection devices.

(17) A military unit may be a troublesome neighbour for the citizens of municipalities due to noise accompanying exercises at the training grounds or in vicinity of airports. Exemplary municipalities are as follows: Nowa Dęba, Mińsk Mazowiecki, Drawsko-Pomorskie.

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SOCIĀLĀ PSIHOLOĢIJA

Alona Eisenberg, Svetlana Ignatjeva

ADAPTATION OF THE ORGANIZATIONAL CITIZENSHIP BEHAVIOR (OCB) DIMENSION METHODOLOGY IN THE ISRAELI LOCAL AUTHORITIES CONTEXT

In a dynamic and changing world, organizations need to compete for scarce resources. Hence the organization's need is to find internal resources without increasing expenditures. In recent decades, the research field has focused on finding the human resources and the factors that influence the employees' willingness to invest in their work beyond the formal definition of the job without expecting any reward. Since the 80's of the previous century, there have been many studies that investigate one of the unique aspects of individual activity at work—"Organizational Citizenship Behavior" (OCB). OCB is defined as the employee behavior which is beyond his formal job description and contributes to the benefit of the organization without expectation for any reward. There is a need for employees called "caring", "investors" and "proactive." B. K. Organ (1988) emphasized that OCB is an important factor in assisting the organization with reaching its goals. While organizations must improve their performance unremittingly, there are organizations (often belong to the public sector as a local authorities) that remain inflexible, bureaucratic and conservative in which employees are often satisfied with the formal fulfillment of official duties. This paper examined OCB questionnaire, developed research methodology, adapted and practical approbated on the context of Israeli local authorities. This study analyzes 529 questionnaires filled out by municipal employees in 12 local authorities in Israel from all parts of the country and from all types of local authorities: municipalities, regional and local councils. OCB is multifactorial phenomenon and its perception is multidimensional. According to Organ's (1988) theory of Organizational Citizenship Behavior which included five dimensions, this research selected 3 dimensions, of which only one matched one of the original dimensions. The selected dimensions are interpreted as: Job dedication, Civil virtue and Loyalty. This research classified employee according their orientation toward their behavior at work and found 4 group that interpreted as: Job orientation, Civil service orientation, Career orientation and Calling orientation. The methodology reveals the mechanism of required profile employee formation. The proposed methodology developed toolkit allows allocating the factor structure of the phenomenon. The method allows classifying employees in relation to their organization to develop methods to improve the efficiency of the organization. The methodology tested in Israeli local authorities can be applied to various public sector organizations. Research aim: the development of tools for monitoring the OCB behavior of the employees and classifying them for the purpose of increasing efficiency by correcting that behavior.

Key words: Organizational Citizenship Behavior, mechanism measurement development, OCB multi-dimensional instrument.

Organizācijas darbinieku civilās uzvedības novērtēšanas metodoloģijas pielāgošana Izraēlas vietējo iestāžu kontekstā

Dinamiskas un nepārtraukti mainīgās pasaules apstākļos organizācijām ir jāiztur sīva konkurence par ierobežotiem darba resursiem. Līdz ar to organizācijām rodas nepieciešamība meklēt iekšējos resursus, nepalielinot izdevumus. Pēdējās desmitgadēs darba resursu pētījumu jomā galvenā uzmanība tika veltīta to faktoru meklēšanai, kuri ietekmē darbinieku gatavību investēt savā darbā ārpus formāli noteiktiem darba pienākumiem. Kopš pagājušā gadsimta 80. gadiem bija veikti daudzi pētījumi, veltīti vienam no unikāliem individuālās darbības aspektiem darbavietā, proti, organizācijas darbinieka civilajai uzvedībai (ODCU). ODCU tiek definēta kā darbinieka uzvedība, kas norit ārpus viņa formāli noteiktiem darba pienākumiem un sniedz ieguldījumu organizācijas darbībā, negaidot par to kādu balvu. Tas paredz, ka darbiniekam ir jābūt “gādīgam”, “spējīgam investēt” un “aktīvam”. ODCU ir svarīgs faktors, lai palīdzētu organizācijai sasniegt nospraustos mērķus. Kaut arī organizācijām ir konsekventi jāpildinveido sava darbība, eksistē organizācijas (bieži vien tie ir valsts sektoram piederošie pašvaldību varas orgāni), kas turpina būt neelastīgas, birokrātiskas un konservatīvas, kurās darbinieki nereti ir apmierināti ar formālu veicamo oficiālo pienākumu izpildi. Piedāvājamajā pētījumā ir izstrādāta un adaptēta organizācijas darbinieka civilās uzvedības izpētes metodoloģija, kura ir aprobēta Izraēlas vietējo varas orgānu kontekstā. Minētajā pētījumā piedalījās 529 respondenti, kas ir municipāli ierēdņi Izraēlas 12 vietējās varas orgānos visos valsts reģionos un visos vietējos varas orgānos – municipalitātēs, reģionālās un vietējās padomēs. ODCU ir daudzfaktoru parādība, un tā uztverama daudzās dimensijās. Atbilstoši Orgānu teorijai (1988) Organizācijas Darbinieka Civilās Uzvedības modelis ietver piecus faktorus. Piedāvājamajā pētījumā tiek izmantots trisfaktoru modelis. Izvēlētie faktori tiek interpretēti šādi: uzticība darbam, civilā atbildība un lojalitāte. Izvēlēta metodoloģija deva iespēju klasificēt respondentus atbilstoši to uzvedībai četrās grupās, kuras bija interpretētas kā: orientēti uz darbu, orientēti uz civilo apkalpošanu, orientēti uz karjeru un orientēti uz izaicinājumu. Metodoloģija atklāj darbinieka obligātā profila veidošanas mehānismu un dod iespēju noteikt parādības faktoru struktūru. Turklāt metodoloģija ļauj klasificēt darbiniekus atbilstoši viņu attieksmei pret savu organizāciju, kas paver iespēju celt tās darbības efektivitāti. Izstrādātais pētnieciskais instrumentārijs bija aprobēts Izraēlas vietējās varas orgānos, taču tas var būt izmantots arī citās valsts sektora organizācijās. Pētījuma mērķis: darbinieku uzvedības monitoringa un klasifikācijas instrumentārija izstrāde, lai celtu darbības efektivitāti, koriģējot darbinieku uzvedību.

Atslēgas vārdi: organizācijas darbinieku civilā uzvedība, mērījumu mehānisma izstrāde, daudzdimensiju instrumentārijs.

Адаптация методологии измерения организационного гражданского поведения в контексте местных органов власти Израиля

В условиях динамичного и изменяющегося мира организации вынуждены конкурировать за ограниченные трудовые ресурсы. В связи с этим организации испытывают потребность в поиске внутренних ресурсов без увеличения расходов. В последние десятилетия в области исследований трудовых ресурсов основное внимание уделялось поиску факторов, которые влияют на готовность сотрудников инвестировать в свою работу за рамками формального определения трудовых обязанностей. С 80-х годов прошлого века было проведено множество исследований, посвященных изучению одного из уникальных аспектов индивидуальной деятельности на рабочем месте – организационному гражданскому поведению (ОГП). ОГП определяется как поведение сотрудника, которое выходит за рамки его формально описанных должностных обязанностей и вносит свой вклад в работу организации без ожидания какой-либо награды. Это предполагает, что сотрудники должны

быть «заботливыми», «способными инвестировать» и «активными». ОГП является важным фактором в оказании помощи организации в достижении ее целей. Несмотря на то, что организации должны неуклонно совершенствовать свою работу, существуют организации (часто принадлежащие государственному сектору в качестве местных органов власти), которые остаются негибкими, бюрократическими и консервативными, в которых сотрудники часто довольны формальным исполнением официальных обязанностей. В предлагаемом исследовании разработана и адаптирована методология исследования организационного гражданского поведения работников, апробированная в контексте местных органов власти Израиля. В этом исследовании приняли участие 529 респондентов, являющихся муниципальными служащими в 12 местных органах власти в Израиле со всех регионов страны и от всех местных органов власти: муниципалитетов, региональных и местных советов. ОГП — многофакторное явление, и его восприятие многомерное. Согласно Теории Органа (1988), модель Организационного Гражданского Поведения включала пять факторов. В предлагаемом исследовании используется трехфакторная модель. Выбранные факторы интерпретируются как: преданность делу, гражданская ответственность и лояльность. Применяемая методология позволила классифицировать респондентов в соответствии с их поведением на работе в четыре группы, которые интерпретировались как: ориентированные на работу, ориентированные на гражданское обслуживание, ориентированные на карьеру и ориентированные на вызов. Методология раскрывает механизм формирования обязательного профиля сотрудника и позволяет выделить факторную структуру явления. Кроме того, методология позволяет классифицировать сотрудников по отношению к своей организации для разработки методов повышения эффективности ее работы. Разработанный исследовательский инструментарий был опробован в израильских местных органах власти, но он также может применяться к различным организациям государственного сектора. Цель исследования: разработка инструментария для мониторинга поведения сотрудников и их классификации с целью повышения эффективности работы путем корректировки их поведения.

Ключевые слова: организационное гражданское поведение, разработка механизма измерения, многомерный инструментарий.

Introduction

Nowadays, each organization is aimed to be competitive by having the best human resources (Singh and Singh 2010). In order to increase the effectiveness of organizations it is necessary to recruit employees that are entitled as “caring”, “investors” and “Big Head”. Very few organizations can testify that most of their employees show such type of behavior. One of the organization’s goals is to find the right way to make the worker behave like this, since it is one of the main factors in the organization’s success. An organization where its employees have a human behavior that is expressed in the employee’s contribution beyond the job’s demands, beyond the level he committed to and for what he is not recompensed by the organization, will be able to be competitive and to succeed for years. Organ (1990) called this behavior as “Organizational Citizenship Behavior” (OCB) and emphasized it as an important factor in assisting the organization to reach its goals.

OCB is a type of behavior of members of organization that is intended to improve the effectiveness of the organization, without ignoring productivity and individual goals of each employee (Castro et al. 2004). The behavior of the employee is not formally required by the management in order to evaluate the work of employee, but its existence is able by itself to increase the organizational function, because it is based more on personal freedom and in expressing the initiative (Bienstock et al. 2003). OCBs are important to the success of organizations, and the people that work in them (Podsakoff et al. 2014) Each organization is required to continuously improve its performance and effectiveness in order to be able to survive in this era of globalization.

Local authorities remain conservative and inflexible corporate objects in which employees are often satisfied with the formal fulfillment of official duties. Local authorities are the level of government closest to the citizen. They stand at the forefront of governmental authority and are the first address for the residents (Beer, Yuval 2012).

Local authorities in Israel derived their framework from those of the British Mandate in Palestine. After established the State of Israel in 1948 legislation was made to set the duties and authorities of the local government that include providing local services, such as garbage disposal, road paving and maintenance of public gardens and parks, social services, and establishment of institutions for sports, education, culture and health.

Israel has three kinds of local authorities with different municipal statuses:

- Municipal council – a local authority that has the status of a municipality;
- Local council – a local authority that is not large enough to have the status of a municipality;
- Regional council – a local authority of several settlements, usually rural but sometimes urban localities are also included.

According to the Central Bureau of Statistics, in July 2017 Israel had 255 local authorities – 76 municipal councils, 125 local councils and 54 regional councils. 74.8% of the population live in municipalities, 15.1% in local councils and 10.2% in regional councils. Localities are classified as Jewish or non-Jewish according to the majority population in the locality. There are 8 urban localities in Israel defined as “mixed”.

Traditionally, this sector in Israel suffers from some main problems (Cohen 2016): the excessive influence of the political echelon; labors union, became the key players in the political arena; not professional senior bureaucracy and low motivation of employees; employees are not trained and able to deal with the social-economic changes; has enjoyed high employment protection and premium pay; the system is very concentrated and is multi-procedures, especially notable concentration of the Ministry of Finance.

Local government in Israel is based on independent income from municipal taxes and various levies that do not cover all the activity of the authority. That is why the authorities need budgets from government ministries. Like other Western democracies,

the local government in Israel has experienced an economic, administrative and political crisis. The necessity to improve the performance and effectiveness of employees intensifies due to the constant changes and the failure of the local government to meet those. One way to increase productivity is to create a team of employees who have OCB behavior.

The **purpose of this study** is development of tools for monitoring the OCB behavior of the employees and classifying them for the purpose of increasing efficiency by correcting that behavior.

To achieve this goal, the following issues must be resolved:

- Development research methodology and its adaptation;
- Practical approbation on the context of Israeli local councils;
- The organizational citizenship behavior indices OCB can be used by the manager as evaluation tools for determination and assessment of the employees and the development of their perfection.

Literature Review

Organizational citizenship behaviors (OCB)

The term ‘organizational citizenship behavior’ (OCB) was first defined by Smith, Organ & Near in 1983. They describe the behaviors that are different from in-role behaviors and go beyond the role prescriptions to contribute to organizational functioning. According to Organ (1988, p. 4), OCB reflects “individual behavior that is discretionary, not directly or explicitly recognized by the formal reward system and that is the aggregate which promotes the effective functioning of the organization”. Organ (1988) thinks that the behavior is not an enforceable requirement of the role or the job description, that is, the clearly specifiable terms of the person’s employment contract with the organization; the behavior is rather a matter of personal choice, such that its omission is not generally understood as punishable. OCB is not written in any job’s definition and results occur from people’s own personal extra effort (Kaya 2015).

Bateman & Organ (1983) classified OCB as helping voluntarily other employees, providing innovative suggestions to improve the organization, not taking advantage of employees rights, not requesting unnecessary leaves, participating in the elective meetings and avoiding complaints. Jackson (2009) described OCB as beneficial behavior of employees, which was not prescribed but occurred freely to help others achieve the task at hand.

According to Organ’s (1988) theory, organizational citizenship behavior has five dimensions (Table 1).

Table 1

Value of an Organizational Citizenship Behavior

Dimension	Definition
Altruism	all voluntary behaviors, specifically aimed at helping others in an organizationally relevant issue or in relation to problems in the organization (Kamer 2001).
Conscientiousness	The behaviors that reflect the genuine acceptance and adherence of workplace rules, regulations, and procedures in a manner above what is expected (Podsakoff et al. 2000).
Sportsmanship	the behaviors that includes tolerance, respect, and avoidance from nonsense problems/talk (Altınbaş 2008).
Courtesy	behaviors that includes informing other employee before the decisions that may affect them is connected to courtesy (Deluga 1995).
Civic Virtue	characterized by behaviors that indicate an employee's deep concerns and active interest in the life of the organization (Law, Wong, Chen 2005).

Source: adapted from (Organ 1988), (Kamer 2001), (Podsakoff et al. 2000), (Altınbaş 2008), (Deluga 1995), (Law, Wong, Chen 2005)

- Altruism indicates behaviors that seeks to improve other's welfare rather than being self-serving; they must be voluntary, intentional and should not be accomplished in the expectation of a reward (Haski-Leventhal 2009).
- Conscientiousness indicates commitment to work of the people, for example they continue the job even in the worst condition or illness. Organ (1988) has defined it as dedication to job exceeds formal requirement.
- Sportsmanship is defined as "a willingness to tolerate the inevitable inconveniences and impositions of work without complaining" (Organ 1990, p. 96). This dimension indicates "good sport" and tolerating reaction to unexpected occurrence.
- Courtesy indicates that the staff behave respectfully with colleagues, supervisors and client.
- Civic Virtue refers to responsible participation of employees in political life cycle of organization and supporting the administrative function of the organization such as additional and extracurricular activities when their attendance is not necessary (Talachí et al. 2014). This dimension indicates that staff identifies itself with the organization and accept its responsibilities.

Where OCB can be found? In which behavior is the concept expressed? Here are some examples of behavior that reflect the behavior of the OCB:

- Helping voluntarily others when they return from a long absence;
- Sharing information with other employees;
- Announcing in advance when the worker can't get to work;
- Not taking breaks outside those that are officially defined;
- Not requesting unnecessary leaves;
- Not doing personal phone calls from the work;
- Not looking forward to the end of the work;

- Using the organization's resources in a prudent and economical way even when it is not enforced by the management;
- Providing innovative suggestions to improve the organization;
- Contributing to improving the organization's image and reputation in the external environment;
- Not overwhelming employees' rights;
- Assisting the superiors even when they don't ask to do so and without expecting anything in return.

Because of the changing environment, organizations will necessarily become more dependent on individuals who are willing to contribute to successful change, regardless of formal job requirements (Somech, Drach-Zahavy 2004). OCB expressed in different levels of identification with the organization, its goals and values. It gives the organization strength, motivation and resources and promotes the organization's interests. OCB specifies activities that are not considered as organizational qualifications, but as the activities, which are useful for organizations.

Recent researchers focused on the practical importance of the OCB. According to Organ, Podsakoff and Mackenzie (2005), OCB contributes to innovation, resource transformation and adaptability in environments demanding complex, team oriented and ambiguous work, which ultimately improves the efficiency and effectiveness of the entire organization. According to Oplatka (2004, 2009), the employee's work life includes many activities and tasks that are beyond the formal definition of the employee's role, are given to his/her consideration and his/her desire, and very much contribute to the organization's functioning and its success. OCB develops the effective performance of organization, elevates the organization as a whole and recommends it to other parties (Williams, Anderson 1991).

Since the establishment of the OCB concepts, numerous studies had been conducted, which examined the connection between organizational citizenship behavior and other organizational phenomena, such as job satisfaction (Williams, Anderson 1991; Talachi, Gorji, Boerhannoeddin 2014), personal commitment (Tepper et al. 2004), turnover intention (Egan, Yang, Bartlett 2004), interdependence and team's identification (Van Der Vegt et al. 2003), professional (Cohen, Kol 2004), organizational politics (Vigoda 2000), organizational climate (Farooqui 2012) and organizational support (Islam, Khan, Ahmad, Ahmed 2014).

Most researchers have focuses on individual antecedents of OCB. Because OCB is performed by individuals, it's reasonable to investigate their behavior in individual context. However, individuals who have OCB, don't work in a vacuum. They are part of the team and part of the organization, that's why OCB should be investigated from organizational perspective.

This research will use the five-category model developed by Organ (1988). In this study OCB is defined as discretionary behavior directed at individuals or at the organization as a whole, which goes beyond existing role expectations and benefits the organization is intended to benefit it (Organ 1988).

Research Method

For statistical analysis and presentation of the results of the research was used software package SPSS (“Statistical Package for the Social Sciences”), version 23 for Windows.

Data analysis consisted of such stages as the adaptation of the constituent parts of a questionnaire, preliminary analysis, which allows formulating research hypotheses and their proofing.

The adaptation of the questionnaire included an analysis of the factorial structure of the questionnaire and an analysis of the suitability of indicators displaying the OCB for the purpose of analyzing the factor structure of the parts of the questionnaire, an exploratory (research) factor analysis was performed that reduces the dimensionality of the phenomenon under consideration, moving from indicators to aggregated indicators and latent variables.

Factor analysis was carried out with the selection of factors by the Extraction method with principal component analysis and subsequent Rotation Method (Varimax-with Kaiser Normalization). Varimax rotation minimizes the number of variables with a high factor load (assuming that others variables have low factor loads). This method is the most commonly used, because it facilitates the interpretation of factors. To assess the results of factor analysis, additional statistical indicators are used. The Bartlett’s Test of Sphericity is used to assess the suitability of the correlation matrix used. If this coefficient is large enough, and the corresponding significance level is small (for example, less than 0.05 or 0.01), this indicates the reliability of the calculation of the correlation matrix. To evaluate the suitability of the elements of the correlation matrix and the possibility of its description using factor analysis, the so-called Kaiser-Meyer-Olkin Measure of Sampling Adequacy is used. The values of KMO about 0.9 are estimated as “marvelous”, 0.8 – “meritorious”, 0.7 – “middling”, 0.6 – “mediocre”, 0.5 – “miserable”, and below 0.5 – “unacceptable”.

The processing of the questionnaire was reduced to the calculation of aggregated indicators (secondary data) on the basis of indicators (primary data obtained directly from the survey). Aggregated indicators of the identified factors can be obtained both as a result of calculating the arithmetic average of the respective indicators, and as a result of the exploratory factor analysis. The first option is the simplest from the point of view of implementation, but it does not take into account the differences in the factor loads of individual indicators. In the second variant, on the contrary, the contribution to the allotted factors of all indicators, including those that have small factor loads, is taken into account.

As a result of factor analysis, aggregated estimates of factors have a standardized form (measured on a z-scale). Standard estimates are distributed according to the normal law with zero mean and unit variance. This is convenient for conducting a comparative analysis of different indicators or the same indicators for different groups of respondents. Standardized values of factors allow to classify respondents for each of the factors, depending on whether they are above or below the average. If the aggregated indicators are obtained as the average values of the corresponding indicators, then their standardization makes sense for better understanding and their sub-

sequent interpretation. The disadvantage of the z-scale is negative and fractional estimates, which can cause difficulties in the qualitative interpretation of the test results. Therefore, special, linear transformation methods for z-estimates are applied to translate them into a set of positive integers.

To translate estimates into the region of positive integers, new mean arithmetic mean (M) and standard deviation (σ) are selected. They retain all the differences between the scores of the subjects identified in the Z-scale, but they can get rid of negative and fractional values of z due to the multiplication of each z -score by the same number, as well as the addition of a general constant and subsequent rounding. To convert the z -estimates, we use the formula $z1 = M + \sigma * z$, where M is the new arithmetic mean; σ is the new standard deviation. In this paper, a transformation is used that translates the values of z into a one hundred-point T-scale using the formula $T = 50 + 10 * z$. Estimates of factors on this scale can be interpreted as indicators of the corresponding parameters of the investigated phenomena, expressed in % in relation to the maximum possible result. The value of 50 points corresponds to the average value and can be interpreted as the level of formation of the corresponding factor by 50%. In this case, the values from 40 to 60 points are interpreted as the Average level, less than 40 – Level below average, more than 60 – Level above average.

Internal consistency is a characteristic that reflects the internal consistency of the obtained measurement results. Internal consistency is determined by the connection of each specific element of the questionnaire with the overall result. The extent to which each element conflicts with the others, as far as each individual question measures the direction to which the whole test is directed. To assess the reliability-consistency of the items in the questionnaire, the Cronbach's Alpha coefficient was used.

Preliminary data analysis includes descriptive statistics of quantitative data (calculation of mean values of characteristics, mean square deviation, median, quintilefunction).

For presentation and analysis at this stage of the study, bar, line and pie charts are used.

The decision trees method is one of the most popular methods for solving classification and forecasting problems. The classification trees constructed in the OCB factor space allow estimating the descriptive ability of the identified factors, as well as predicting the distribution of respondents according to the relevant clusters on the basis of simple rules.

The empirical basis of the research was the data obtained from a survey of 529 respondents from 12 local authorities in Israel. The respondents were from all types of local authorities: municipalities, local and regional councils, from all places in the country: North, Central and Southern, and all types of cities: small, medium and large, and all types of socioeconomic status. The majority of respondents 348 (65.8%) were women, 181 respondents (34.2%) are men, which corresponds to the gender composition of the general population. By level of education, the respondents were distributed as follows: 201 (38%) – VA, 100 (18.9%) – MA, 228 (43.1%) have Matriculation certificate. Position Time: 490 (92.6%) – Full time, 39 (7.4%) – Part time. The age of respondents varied from 24 to 72 years and half of the respondents were at least 45 years old. The average age for the sample is 45 years. The work experience of

respondents from 2 months to 45 years, with an average of 13 years. A quarter of respondents had no more than 5 years of work experience, while the other quarter had not less than 20 years.

To analyze the factor structure of the questionnaire in the space of the OCB indicators, a factor analysis was performed. The criterion for the adequacy of the Kaiser-Meyer-Olkin sample of the Sampling Adequacy (KMO) is 0.839, Sig. of Bartlett's Test of Sphericity is less than 0.001, which indicates the expediency of using factor analysis to analyze the structure of the questionnaire. The factor loads of the indicators that determine the semantics of the selected factors are shown in Table 2.

Table 2

OCB Factors, Indicators and Factor Loads

	Component		
	FOCB1	FOCB2	FOCB3
When necessary, I am willing to assist a colleague with the performance of his work	,789		
I'm willing to assist new colleagues to get acquainted with the work environment	,783		
I'm willing to help colleagues with solving work-related problems	,749		
I refer to my job seriously and try not to do any mistakes	,679		
I comply with organization rules and procedures even when nobody watches and no evidence can be traced	,626		
I try to arrive early to work and start working immediately	,546		
I am willing to work more than the contractual stipulated time, without expecting any additional remuneration		,710	
I am proud of my work at organization, and always speak positively about its activities	,412	,666	
I take an active part in solving corporate problems		,651	
I suggest ideas for the improvement of the work processes and their results		,587	
I'm ready to perform tasks that go beyond my official duties	,501	,572	
I don't tend "to make mountains out of molehills" concerning problems arising during my work			,793
I don't tend to complain about marginal issues at work			,786
I avoid with holding other people's rights with regard to common shared resources	,466		,582
I avoid taking actions that hurt others	,447		,567
I do not initiate any actions before consulting with others that might be affected			,493

Source: elaborated by the authors according to statistical data analysis in SPSS.

According to Organ's (1988) theory of Organizational Citizenship Behavior which included five dimensions, this research selected 3 dimensions, of which only one

matched one of the original dimensions. The selected dimensions are interpreted as: Job dedication (FOCB1), Civil virtue (FOCB2), Loyalty (FOCB3) (Table 3).

Table 3

Adaptive value of an Organizational Citizenship Behavior

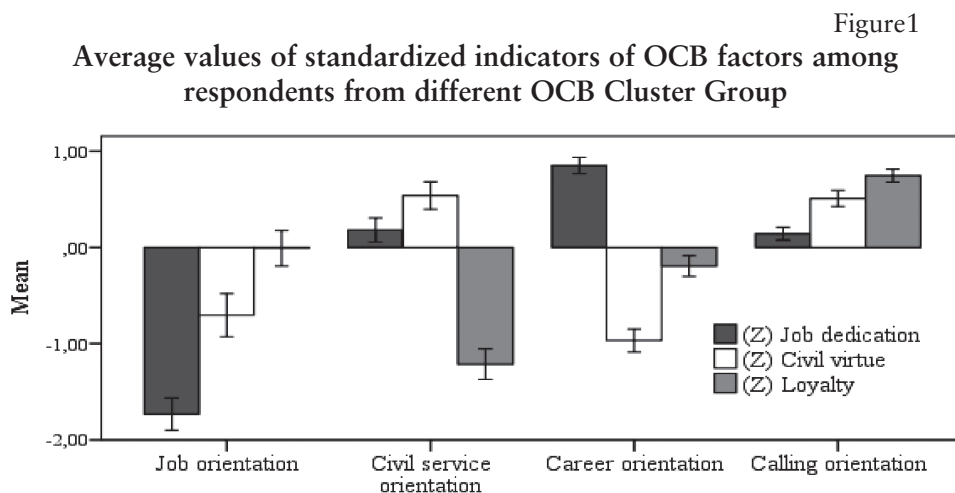
Dimension	Definition
Job Dedication	could be defined as employee behavior centers on hard working, performing according to procedures and rules, taking the initiative to solve a problem. Van Scotter & Motowidlo (1996) described job motivation as “the motivational foundation for job performance that drives people to act with the deliberate intention of promoting the organization’s best interest” (p. 526). Job dedication is labeled as conscientious initiative when employees persists extra enthusiasm to complete their tasks successfully (Harzer & Ruch 2014). Job dedication helps an employee in case of difficulty or volunteering for additional work beyond the specified tasks in their job description (Liu et al. 2013).
Civic Virtue	could be defined as employee behavior expresses willingness to participate actively in the life of the organization, to maintain and improve it. It indicates an employee’s deep concerns and active interest in the life of the organization (Law, Wong, Chen 2005). It refers to responsible participation of employees in political life cycle of organization and supporting the administrative function of the organization such as additional and extracurricular activities when their attendance is not necessary (Talachi et al. 2014).
Loyalty	could be defined as employee behavior which places an organizational interest above the personal, maintains an organizational interest, and identifies with the organization. According to Graham (1991) it behavior include cooperating with others to serve the interests of the whole (p. 255). Loyalty is a person’s willingness and full commitment to sincere and solid friendship, sincere dedication to the organization and other employees, having feelings of bonding, inclusion, care, responsibility and devotion towards it (Uygur, Koç 2010).

Source: elaborated by the authors according to (Scotter, Motowidlo 1996), (Harzer, Ruch 2014), (Liu et al. 2013), (Law, Wong, Chen 2005), (Talachi et al. 2014), (Graham 1991), (Uygur, Koç 2010).

The total percentage of variance attributable to the identified factors (Cumulative % of Total Variance Explained) is 54%. The Job dedication factor accounts for 24% of the total variance, Civil virtue is 17%, Loyalty is 13%. Cronbach’s Alpha = .867 for the Job dedication factor (Table 5), Cronbach’s Alpha = 0.800 for factor and Civil virtue (Table 6), Cronbach’s Alpha = 0.789 for the loyalty factor (Table 7), which indicates good internal consistency of the scales constructed.

The quantitative values of the isolated factors were obtained from the results of factor analysis and measured by the z-scale (mark Z). For a better interpretation of the results, we also use the stobal T-scale (mark T) and the ordinal scale of three levels (mark L).

Two-stage cluster analysis in the space of OCB factors allowed grouping the respondents into four homogeneous clusters (Figure 1). They can be classified according to employee orientation toward their behavior at work. Wrzesniewski et al. (1997) proposed three distinct relations people can have to their work: Job, a Career or a Calling orientation. This study found one more: a Civil service. Selected factors can be interpreted as Job orientation, Civil service orientation, Career orientation, Calling orientation (Table 3).



Source: elaborated by the authors according to statistical data analysis in SPSS.

Table 4

Type of employees according to OCB

Dimension	Definition
Job orientation	Employees focus on financial rewards. For them job is not a major part of life. These people work because they have to. They work to receive the pay to support their life outside work. They don't have a strong connection to the workplace or their job duties. "People who have Jobs are only interested in the material benefits from work and do not seek or receive any other type of reward from it" (Wrzesniewski 1997, p. 22).
Civil service orientation	Employees who do not target one organization or another. They will make efforts to provide service and assistance regardless of affiliation to the organization. They will try their best to help their co-workers, suppliers and customers, but they will do so in any organization where they work.
Career orientation	Employees are ambitious people. They expect to be promoted as a reward for their work. They are willing to work hard, perform the tasks, and try to impress others. They seek to reach a higher status, to receive power and influence. Usually they are mission oriented and not people and are unwilling to invest in helping others. "People who have Careers have a deeper

Sequel to Table 4 see on the next page.

Sequel to Table 4.

	personal investment in their work and mark their achievements not only through monetary gain, but through advancement within the occupational structure” (Wrzesniewski 1997, p. 22) and solid friendship, sincere dedication to the organization and other employees, having feelings of bonding, inclusion, care, responsibility and devotion towards it (Uygur, Koç 2010).
Calling Orientation	Employees see their work as integral to their lives and their identity. “A person with a Calling works not for financial gain or Career advancement, but instead for the fulfillment that doing the work brings to the individual” (Wrzesniewski 1997, p. 22). They view their career as a form of self-expression. Those people find meaning, purpose and satisfaction in their work. For them an attitude toward an occupation is not part of one’s formal occupational role (Berg, Grant, Johnson 2010).

Source: elaborated by the authors according to (Wrzesniewski 1997), (Uygur, Koç 2010), (Berg, Grant, Johnson 2010).

OCB Job orientation is the smallest one: it contains 86 (16.3%) respondents, OCB Civil service orientation and OCB Career orientation contain 114 (21.6%) respondents, OCB Calling Orientation is the most numerous: 215 (40.6%) respondents.

Respondents OCB **Job orientation** values of all OCB factors do not exceed the average for the aggregate level. Job dedication varies from 10 to 45 relative to the average of 32.67, and this is the lowest value of this factor in all cluster groups. The average square deviation of Job dedication is 7.76, the range of variation is 35, the coefficient of variation is 24% (<33%). The cluster is homogeneous by the factor of Job dedication, but the variation of this factor in this cluster is greatest. The Civil virtue factor in the first cluster varies from 20 to 75 relative to the average of 42.96, which is lower than the aggregate average, but higher than in the third cluster, where the average value of this factor is only 40.32 points. The mean square deviation is 10.46, the range of variation is 55, and the coefficient of variation is 24%. The average value of the loyalty factor in the first cluster is 49.93, which corresponds to the average for the aggregate level. There is a weak inverse significant correlation between the factors of Job dedication and Civil virtue in this cluster ($R = -0.223$, $p = 0.039$), that is, for large values of Job dedication, the respondents of this cluster have smaller values of Civil virtue. At the same time, the correlation between Job dedication and Loyalty is direct ($R = 0.248$, $p = 0.021$), that is, the more Job dedication, the more Loyalty.

Respondents OCB **Civil service orientation** are characterized by the fact that the loyalty factor they have lower than the average for the aggregate and lower than for respondents from other cluster groups. At the same time, the values of the factors Job dedication and Civil virtue are higher than the aggregate average. The loyalty factor varies from 12 to 48 points relative to the average value of 37.88, the range of variation is 36 points, the standard deviation is 8.54, the coefficient of variation is 22.5%. The respondents in this cluster have a reverse significant correlation between Civil virtue and loyalty ($R = -0.248$, $p = 0.003$).

For respondents OCB **Career orientation** is characterized by the highest indicator of Job dedication, while the average values of the factors of Civil virtue and loyalty

are lower than the average for the aggregate, and the average factor of Civil virtue is lower than in the other cluster groups. The values of the Job dedication factor range from 46 to 68 points relative to the average of 58.53, the range of variation is 22 points, the standard deviation is 4.59, the coefficient of variation is 8%, and this is the smallest variation with respect to other factors and relative to other cluster groups. The values of the factor Civil virtue take values from 11 to 52 points, the average value is 40.32, the range of variation is 41 points, the standard deviation is 6.45, the coefficient of variation is 16%. In respondents of this cluster, in contrast to OCB Job Orientation Cluster (1) respondents, the correlation between Job dedication and Loyalty is the reverse ($R = -0.300$, $p = 0.001$).

In OCB **Calling orientation** respondents, the average values of all factors are higher than the average for the aggregate, and the average value of the Loyalty factor is higher than that of respondents from other cluster groups. The values of the Loyalty factor take values in the range from 48 to 67 points, the average value is 57.48, the variation range is 20 points, the standard deviation is 5.01, and the coefficient of variation is 9%. There is a weak inverse significant correlation between the factors of Job dedication and Civil virtue in this cluster ($R = -0.266$, $p < 0.001$).

According to the results of a single-factor analysis of variance, OCB factors in respondents of different OCB Cluster Group differ statistically significantly.

The exception is Loyalty factor in OCB **Job orientation** and OCB **Career orientation**. In the first cluster, the average value of this factor is 49.93, and in the third one – 48.07, but, according to the Bonferroni criterion, these differences are not statistically significant (Multiple Comparisons, Bonferroni test, Sig. = 0.318).

Analyzing the decision tree, it is possible to formulate rules that allow predicting the employee belonging to the OCB Cluster Group (Figure 2).

Growing Method CRT, Dependent Variable – OCB Cluster Group, Independent Variables – (T) Job dedication, (T) Civil virtue, (T) Loyalty.

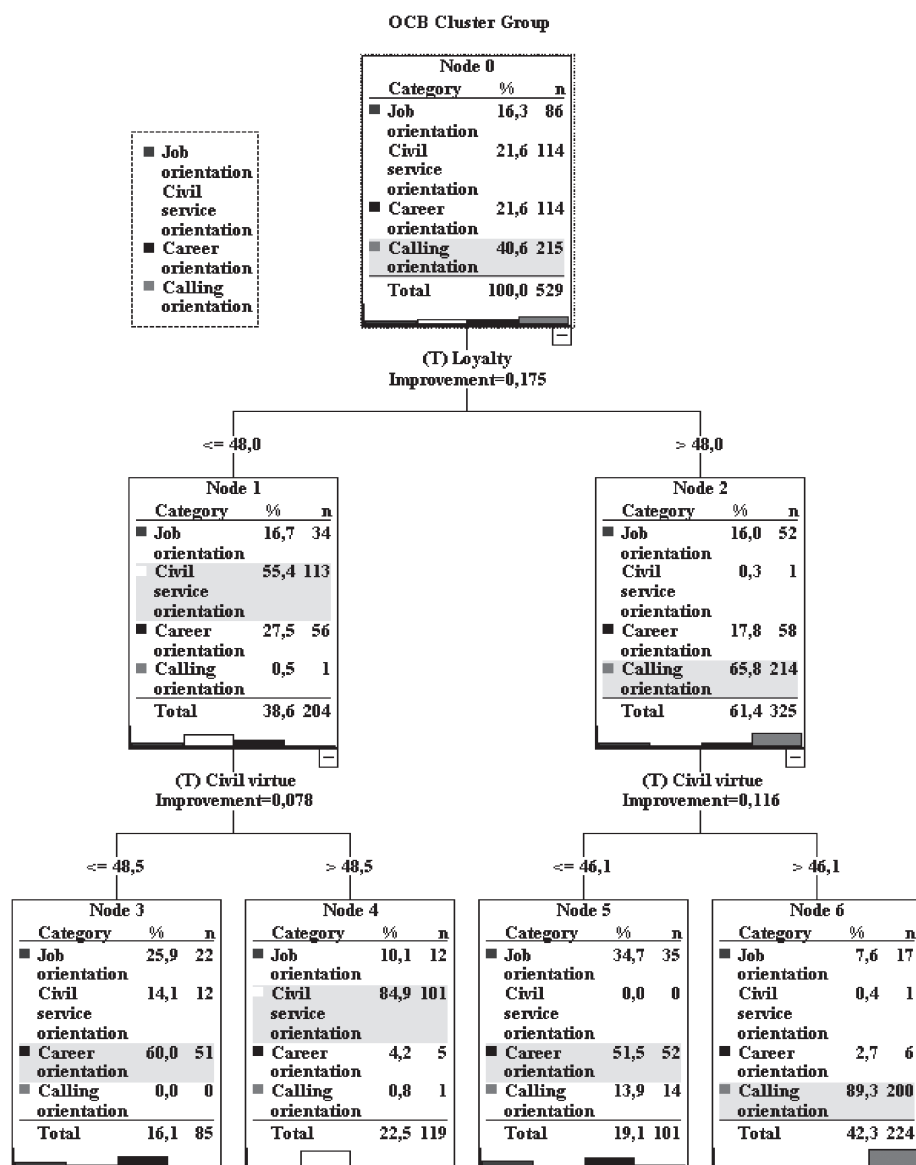
Analyzing the decision tree, it is possible to formulate rules that allow forecasting respondents to enter the OCB Cluster Group on the basis of quantitative indicators of OCB factors.

- With (T) Loyalty > 48 points and (T) Civil virtue > 46 points, the probability of getting into OCB **Calling Orientation** Cluster is 89.3%. The rule is valid for 200 respondents of the sample.
- With (T) Loyalty > 48 points, (T) Civil virtue ≤ 46 points, (T) Job dedication ≤ 45.5 The probability of getting into OCB **Job orientation** Cluster is 100%. The rule is valid for 35 respondents of the sample.
- With (T) Loyalty > 48 points, (T) Civil virtue ≤ 46 points, (T) Job dedication > 45.5 the probability of getting into OCB **Career orientation** Cluster is 78.8%. The rule is valid for 52 respondents of the sample.
- With (T) Loyalty ≤ 48 points, (T) Civil virtue ≤ 48.5 points, (T) Job dedication ≤ 44.4 The probability of getting into OCB **Job orientation** Cluster is 95.7%. The rule is valid for 22 respondents of the sample.
- With (T) Loyalty ≤ 48 points, (T) Civil virtue ≤ 48.5 points, (T) Job dedication > 44.4 The probability of getting into OCB **Career orientation** Cluster is 82.3%. The rule is valid for 51 respondents of the sample.

- With (T) Loyalty ≤ 48 points, (T) Civil virtue > 48.5 points, the probability of getting into OCB Civil service orientation Cluster is 84.9%. The rule is valid for 101 respondents of the sample. The greatest discriminant ability in the classification of respondents in OCB space is the Loyalty factor, the lowest is Job dedication.

Figure 2

Classification tree in OCB factor space



Source: elaborated by the authors according to statistical data analysis in SPSS.

72 respondents (83.72%) of the first of the allocated clusters have the level of Job dedication below the average. In the second and fourth clusters, respondents with an average level of Job dedication (82.46% and 95.81%, respectively) are significantly more prevalent. The highest number of respondents (42.11%) with the level of Job dedication above the average is observed in the third cluster. According to the criterion 2, these differences are statistically significant.

The largest number of respondents with a level of Civil virtue above the average is present in the fourth of the allocated clusters, in the third cluster there are none at all. Respondents with a level of Civil virtue below the average are observed in the first and third clusters. According to the 2 criterion, the observed differences are statistically significant.

The largest number of respondents with a Loyalty level above the average is present in the fourth of the selected clusters. The level of Loyalty is below average for 48.25% of respondents in the second cluster. According to the 2 criterion, the observed differences are statistically significant.

The largest number of men in relation to women is observed in the second of the selected clusters, the largest number of women in relation to men in the third cluster. The level of statistical significance of criterion 2 is 0.045, therefore the observed differences are statistically significant.

The largest number of respondents with the level of education MA is in the fourth cluster. However, according to the criterion 2, these differences are not statistically significant. (Sig = 0.095).

There are no statistically significant differences in work experience among respondents from different clusters (2, Sig.= 0.175)

Conclusions

OCB is multifactorial phenomenon and its perception is multidimensional. Factor analysis conducted in this study points to 3 Organizational Citizenship Behavior mechanisms in local authorities: Job dedication Civil virtue, Loyalty. These mechanisms define the type of employees: Job orientation, Civil service orientation, Career orientation, Calling orientation. The developed toolkit allows allocating the factor structure of the phenomenon. The method allows classifying employees in relation to their organization.

The proposed methodology can be used both to assess the type of employee according OCB and to build a development plan for improving his approach to job. With the purpose of effective realization of OCB, individual and group work is necessary, depending on at what level of perception the employee is and to which of the clusters belong.

The operative conclusion from the study is that in the hands of the organization the ability to change the organizational civil behavior and motivation of its employees by changing any of the parameters, some or all. Furthermore, the classification of the different types of employees enables the management of the organization not only to affect each of the OCB parameters, but also the type of employees that the organization "manufactured".

The contribution of the research is that the OCB is an important strategic tool for the organization's management to increase the involvement and contribution of the organization's employees to its goals. The methodology allows organization to implement self-assessment in terms of effective performance of the OCB and, based on the analysis of the results obtained, develop plans for improvement. The methodology tested in Israeli local authorities can be applied to various public sector organizations.

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ZINĀTNISKĀ DZĪVE

AIZSTĀVĒTIE PROMOCIJAS DARBI

Alina Ohotina

INVESTMENT CLIMATE IN LATVIA, LITHUANIA, BELARUS CROSS BORDER REGIONS



*Author of the thesis
Dr. oec.
Alina Ohotina*

Substantiation of the topic, arguments and reasons. The issue of attracting investments is one of the key issues in modern society. The global experience shows that sustainable economic development and growth are determined by the volume and structure of investments. Researchers also proved the investment multiplier effect on the economy – the increase in the volume of investments promotes the increase in the Gross Domestic Product (GDP) and vice versa.

The interest towards the study on the investment phenomenon appeared since the time when economic theory emerged as an independent science. The concept of investments was considered from different viewpoints and it was changing as far as the economic theory was developing. The methodology for the research into the investment phenomenon was founded in the works of the representatives of classical economic theory such as A. Smith (2007),

D. Ricardo (Petty, Smith, Ricardo 1993), J. Mill (1896) and others in the context of the theory of capital. Later, L. Walras (2000), A. Marshall (1993), A. Pigou (1985) and others broadened the theory of capital and introduced the concept of investments into the scientific discourse. J. Keynes (2007) was the first who spoke about the need for the analysis of conditions for an investment process, i.e. a paradigm of the investment climate in its modern sense. J.R. Hicks (1993), R. Harrod (2011), A. Hansen (2008) and others considered the investment dynamics as a cyclic phenomenon which also directly influences economic development. M. Friedman (2000) and P. Samuelson (1994) provided the definition of the investment concept that was closer to the reflection of its economic nature in its modern sense. Modern economic research pays more attention to the Foreign Direct Investment (FDI) and their influence on the economic growth (Feenstra and Markusen,

1994; Blomstrom, Kokko, 1997; Janicki, Wunnav, 2004; Eriņš, Orlovskā, 2006; Tvaronavičienė et al., 2009; Šumilo, 2010) and sustainable development (Romer, 1990; Barro & Sala-i-Martin, 1995; Tvaronavičienė, Lankauskienė, 2011; Šimelytė, Antanavičienė, 2013, Tvaronavičienė et al., 2013, Dudzevičiūtė, 2015). Within the frameworks of classical, neo-classical, Keynesian economics, modern neo-classical theories, the concept of investments has been considered at macro and micro levels. Within the framework of modern research, the concept of investments has been developed at a deeper and broader level; various types of investment classifications have been provided.

Since the beginning of the 21st century the interest in investments at a meso-level has arisen. At that time researchers in Latvia also began to get interested in the study into the investment climate in the country (Babuškis, 2004; Titarenko, 2004), later – in the cities (Grizāns, 2015). The research was carried out in the region and industry aspects (Titarenko, 2005; Dubra, 2007; Хотулев, 2009; Игнатьев, 2009; Iwasaki, Suganuma, 2015), whereas the group of research into investment in cross-border regions can be separated (Kratke, 2002; Fung, Garcia-Herrero Ng, 2011). At that time researchers began to get interested into specific factors of the quality of the investment climate. The scientists such as N. Stern (Stern, 2002), S. Babuškis (Babuškis, 2004), D. Titarenko (Titarenko, 2006), E. Dubra, M. Gulbe (Dubra, Gulbe, 2007), S. Liepina, J. Coolidge, L. Grava (Liepina, Coolidge, Grava, 2008), V. Karačuns (Karačuns, 2010), Г. Шмарловская, Е. Петрушкевич (Шмарловская, Петрушкевич, 2010), S. Hilkevičs, D. Štefenberga (Hilkevičs, Štefenberga, 2013), L. Gaspariene (Gaspariene, 2015) and others studied certain factors that influence the investment climate. Such scientists as N. McKinnish (McKinnish, 2005), J. Kolko (Kolko et al., 2013), G.M. Artz, K.D. Duncan, A.P. Hall, P.F. Orazem (Georgeanne, Duncan, Hall, Orazem, 2016), В. Иваненко (Иваненко, 2007) noted that a specific function and a number of advantages are peculiar to the investment climate in cross-border regions.

The relevance of the study into the issues of cooperation in cross-border regions in order to provide mutual activities for sustainable development is proved by the implementation of a number of the European Union (EU) programmes on cross-border cooperation. The strategic aim of the European Neighbourhood and Partnership Instrument “Latvia-Lithuania-Belarus” 2014–2020 Programme is to enhance cooperation, to increase the number of opportunities, and to exchange experience between people and organizations in Latvia, Lithuania and Belarus; to provide economic and social wellbeing, to increase the general quality of life in cross border regions. The Latvia, Lithuania, and Belarus cross-border territory includes 11 regions: Latgale region in Latvia, Alytus, Kaunas, Panevezys, Utena, and Vilnius counties in Lithuania, and Vitebsk, Grodno, Minsk, Mogilev oblasts and Minsk city in Belarus. The development of cross-border cooperation is a prerequisite for establishing the territory that consolidates the use of economic, financial, labour and other types of resources for the improvement of the investment climate in cross-border regions.

The global experience of calculating the investment climate indicators as well as the indicators that indirectly characterize the favourableness of the investment climate is broad. A number of organizations dealt with the establishing of these indicators – the Bucharest Academy of Economic Studies (Raluca Danciu, 2010), the Gdansk

Institute of Market Economy (Novocki et al., 2015), the Region Development Agency of the Republic of Latvia (Valstsreģionālāsattīstībasaģentūra, 2012), the Rating Agency "Expert RA" (Рейтинговое агентство «Эксперт РА», 2015), the United Nations Conference on Trade and Development (United Nations University – International Human Dimensions Programme, 2015), the World Bank Group (World Bank Group, 2015a, 2015b, 2015c), the World Economic Forum (World Economic Forum, 2015), the Institute of Management Development (Institute of Management Development, 2015) and others. A detailed analysis of these investment climate methods showed that very often there is no methodology that the assessment method is based on, as well as there is a lack of transparency of the method and its repeatability. Moreover, most methods have been elaborated for the study into the investment climate at a country level; there is a lack of attention to the research into the investment climate in regions.

The abovementioned facts as well as the lack of a reliable method for the assessment of the investment climate at a meso-level (a region level), not a macro-level (a country level), determined the choice of the topic for the doctoral thesis, and specified its relevance and practical significance of its outcomes. The study into the investment climate of the regions that are part of Latvia, Lithuania, and Belarus, as well as the study into the cross-border regions in these countries is becoming more and more important for increasing competitiveness in these regions, attracting foreign investments, the sustainable development and integration in these regions, as well as increasing the standard of living there.

The object of the research of the doctoral thesis: the investment climate in Latvia, Lithuania, Belarus cross-border regions (Latvia – Latgale region; Lithuania – Vilnius county, Alytus county, Utena county, Panevezys county, Kaunas county; the Republic of Belarus – Vitebsk oblast, Grodno oblast, Minsk oblast, Mogilev oblast).

The subject of the research of the doctoral thesis: quantitative and qualitative differences in the investment climate in Latvia, Lithuania, and Belarus cross-border regions.

The research hypothesis: there are a number of significant quantitative and qualitative differences in the investment climate in Latvia, Lithuania, and Belarus cross-border Industrial, labour which are determined by production, labour and tourist potentials, and criminal and social security.

The purpose of the research is to elaborate the methodology for assessing the investment climate in the regions, and with the help of this methodology to study quantitative and qualitative regional differences in the investment climate that are determined by the influence of certain factors.

In accordance with the research purpose the following tasks of the thesis research have been set:

1. To research into the nature of the concept, the stages in the development and use of the concept "investments" in economic theories; to specify the concept and structure of the investment climate, the factors that influence it as well as statistical indicators that comprise the concept of investment climate.
2. To study the world experience in assessment of the investment climate, to classify modern research into the investment climate, to identify strengths and flaws of the methods for research into the investment climate; to elaborate the method for

assessment of the investment climate (integral index) at a meso-level in the regions of Latvia, Lithuania, and Belarus.

3. To calculate the integral index of the investment climate in Latvia, Lithuania, and Belarus regions; to classify regions according to the value of the investment climate indicator and to summarize the outcomes in a cartographic form; to carry out the analysis of quantitative and qualitative differences in the investment climate and its constituents, including cross-border and other regions, as well as to analyze factors that influence the favourableness of the investment climate in these groups of regions.

The doctoral thesis is developed according to the tasks of the research and consists of three parts. The definition of the investment climate is provided in **the first part** of the thesis. The concept of investment climate is a complex one, therefore, first, the definitions of the two constituent parts of it – a climate and investments- are provided. A climate is interpreted from the perspective of the evolutionary economic theory in its direct meteorological meaning; the evolution of theoretical approaches to investments is examined in the classical, neo-classical, Keynesian economic theories, as well as in the modern research. The factors that influence the investment climate as well as statistical indicators of the investment climate have been identified. In **the second part**, the methodology for establishing the integral index of the investment climate at a meso-level by the example of Latvia, Lithuania, and Belarus regions has been elaborated. The methodology for classification of the regions on the basis of the integral index of the investment climate has been elaborated, and the method that characterizes the dependency of differences in the GDP volume and the calculated investment climate in the regions under study has been chosen. The methodology for the analysis of the influence of statistical indicators on the values of investment potential and investment security, and for identifying the contribution of types of investment potential and investment security into the assessment of the investment climate has been elaborated; the methodology for the comparison between the average values of the types of investment potential and investment security, the investment climate profile, the interaction between the types of investment potential and investment security in the cross-border and other regions has been worked out. In **the third part** of the thesis, the integral index of the investment climate at a meso- level by the example of Latvia, Lithuania, and Belarus regions has been established. The classification of the regions according to the values of the integral index of the investment climate has been carried out; the outcomes are presented in a cartographic form. The factors and statistical indicators that influence the level of the investment climate have been identified. The analysis of the interaction between the FDI volumes and the level of the investment climate in Latvia, Lithuania, and Belarus regions has been carried out. The differences in the investment climate, investment potential and its types, investment security and its types in cross-border and other regions have been analyzed.

Methods applied for completing the tasks of the research within the doctoral thesis:

- the methods of logical analysis and synthesis have been applied for the analysis of the concept of investment climate, factors influencing it, and the analysis of methods

existing in world science for identifying the investment climate, and for the elaboration of a valid method;

- the monographic, analytical, logical-constructive, comparative, and graphical methods have been applied for the study into internationally recognized economic theoretical and empirical sources;
- the sum method has been applied for computation of the integral index of the investment climate in Latvia, Lithuania, and Belarus regions;
- the clustering method on the basis of quintiles has been applied for classification of regions on the basis of the integral index of the investment climate; the outcomes have been presented in a cartographic form;
- the correlation method has been applied for the analysis of the dependence of differences in the FDI volume on the values of the integral index of the investment climate in regions;
- the regression method has been applied for identifying the contribution of the types of investment potential and investment security into the assessment of the investment climate.
- logical analysis and synthesis;
- monographic method;
- analytical method;
- logical-constructive;
- comparative;
- statistical methods (sum, correlation, regression method);
- graphical method.

Materials used for completing the research tasks. Materials developed by the organizations dealing with the issues of regional development, cross-border cooperation and investment climate, such as the World Bank Group (World Bank Group, 2015), the United Nations Conference on Trade and Development (United Nations Conference on Trade and Development, 1996), the Organization for Security and Co-operation in Europe (Organization for Security and Co-operation in Europe, 2006), the United Nations University (United Nations University, 2014), the Rating Agency “Expert RA” (Рейтинговое агентство «Эксперт РА», 2015), the European Neighbourhood Instrument Cross-Border Cooperation Programme Latvia-Lithuania-Belarus (European Neighbourhood Instrument Cross-Border Cooperation Programme Latvia-Lithuania-Belarus 2014–2020, 2013), the Region Development Agency of the Republic of Latvia (Valsts reģionālās attīstības aģentūra, 2012), and the Ministry of Economics of the Republic of Latvia (LR Ekonomikas ministrija, 2012, 2014, 2016) comprise a significant basis for the research. The statistical database of the European Bureau of Statistics Eurostat (Eurostat database, 2015), the Central Statistical Bureau of the Republic of Latvia (LR Centrālās statistikas pārvalde, 2015), the Department of Lithuania Statistics (Department of Lithuania Statistics, 2015), the National Statistical Committee of the Republic of Belarus Belstat (Национальный статистический комитет Республики Беларусь, 2015), the Ministry of Culture of the Republic of Latvia (LR Kultūras ministrija 2015), the State Land Service (Valsts zemes dienests, 2016), the Department of Statistics of the Bank of Latvia (Latvijas Bankas Statistikas

pārvalde, 2016), the Lursoft database on enterprises (Lursoft statistika, 2015), data books that characterize socio-economic development of the regions under research provide the statistical database for the research. The database of the survey on representatives of small and medium-sized businesses in Latvia, Lithuania, and Belarus cross-border regions carried out within the framework of the European Neighbourhood Instrument Cross-Border Cooperation Programme Latvia-Lithuania-Belarus “The Establishment of the United Entrepreneurship Support and Networking System for the Sustainable Latvia, Lithuania and Belarus Cross Border Cooperation (B2B)” (in which the author participated) has been used in the research.

The scientific novelty of the doctoral thesis: in terms of theory and methodology – the concept of the investment climate and its evolution has been specified, and the methodology for the establishment of the integral index of the investment climate has been elaborated; in terms of education – the values of the investment climate in Latvia, Lithuania, and Belarus regions have been calculated, as well as the quantitative and qualitative differences in the investment climate in cross-border and other regions that are determined by the influence of various factors have been identified.

The practical application: the application of the methodology for establishing the index of the investment climate and identifying quantitative and qualitative differences in the investment climate for the elaboration and implementation of the regional and cross-border investment policy, its economic, managerial and institutional components, and grant programmes of socio-economic development. The application of this methodology and the outcomes of the assessment of the investment climate while considering project proposals and distribution of funds within the framework of the European Neighbourhood Instrument Cross-Border Cooperation Programme Latvia-Lithuania-Belarus.

The theses submitted for the defence:

1. The concept and assessment of the investment climate in the region as a complex multidimensional category has developed from micro- and macro-levels to a meso-level in the context of the subjective-objective approach.
2. There are significant quantitative and qualitative differences in the investment climate in cross-border regions from the viewpoint of the objective, subjective and subjective-objective assessments.
3. The key objective factors that determine the objective investment climate in cross-border regions are industrial, labour, and tourist potentials, and criminal and social security.

Main conclusions:

1. Investment climate is a complex, multidimensional concept that economic scientists started to use since the end of the 20th century. The research into investments started much earlier – since the 16th century. The methodology for the research into investment was elaborated within classical economic theory where investments were considered at a micro-level. Later, along with the development of economic theory, the concept of investment was completed with the analysis at a macro-level. The research into investment at a meso-level appears in modern economic theories.

2. J. Keynes was the first one who pointed to the necessity for the study into investment climate, and interpreted it as the environment where investment activity that is influenced by various types of investment potential and risks, is going on. The concept of investment climate developed and changed over the years. Within the framework of the doctoral thesis, the investment climate is an environment where the investment activity is happening. This investment activity is influenced by various types of investment potential: natural-resource, tourist, labour, infrastructure, industrial, consumer, financial, institutional, innovation, and investment risks: political, social, economic, criminal, and financial-legislative.
3. First assessments of the investment climate based on the subjunctive approach were elaborated and applied by western experts in the mid-60s of the 20th century. Later, the development of the methodology for the investment climate assessment was broadened and it became more complicated; the objective approach – statistical indicators – was added. The research into the investment climate in the regions which is influenced by specific and unique regional peculiarities has appeared in recent decades. At present there are various indicators for the investment climate assessment. The weaknesses and strengths of objective, subjective and objective-subjective indicators of the investment climate have been analyzed within the doctoral thesis.
4. The non-transparency of the methodologies of the indicators under study does not provide the opportunity for their re-application within the doctoral thesis in order to assess the investment climate in Latvia, Lithuania, Belarus regions. Therefore, the author has elaborated the methodology for assessment of the investment climate in the regions – computing of the integral indicator of the investment climate. The methodology is based on the objective-subjective assessment of the factors of the investment climate in the regions. The objective assessment of the investment climate according to 63 statistical indicators has been complemented with the subjective assessment of the investment climate in cross-border regions on the basis of the survey on 600 small and medium-sized enterprises.
5. According to the objective assessment, the investment climate in Latvia, Lithuania, Belarus cross-border and other regions is heterogeneous. Brest, Vitebsk, Grodno and Mogilev oblasts fall into the quintile group 1 with a very unfavourable investment climate; Latgale region, Marijampole and Sauliai counties, Gomel and Minsk oblasts fall into the quintile group 2; Alytus, Panevezys, Taurage, Telsiai and Utena counties fall into the quintile group 3; Kurzeme, Pierīga, Zemgale, Klaipēda and Kaunas counties fall into the quintile group 4; Riga and Vidzeme regions, Vilnius county, and Minsk city fall into the quintile group 5. All types of investment potential and investment security also differ in the cross-border and other regions.
6. According to the subjective values of the integral indicator in Latvia, Lithuania, Belarus cross-border regions, Latgale, Vitebsk oblast fall into the quintile group 1; Minsk and Mogilev oblasts fall into the quintile group 2; Panevezys and Utena counties, and Minsk city fall into the quintile group 3; Alytus county, Grodno oblast fall into the quintile group 4; Vilnius and Kaunas counties fall into the quintile group 5. According to W. Zapf's Well-being Typology Matrix taking into consideration the correlation between the objective and subjective assessment

of the investment climate in cross-border regions, Utena, Alytus, Kaunas and Vilnius counties fall into the “Well-being” group; Minsk city falls in the “Dissonance” group; Latgale region, Panevezys county, Vitebsk, Minsk, Mogilev oblasts fall into the “Deprivation” group; Grodno oblast falls into the “Adaptation” group. The subjective assessment of the investment climate is significantly influenced by the objective industrial potential in the regions, social security, as well as financial and labour potentials.

7. According to W. Zapf’s Well-being Typology Matrix taking into consideration the correlation between the objective and subjective assessment of all types of the investment potential and investment security, ecological, political, and criminal security falls into the “Well-being” group; financial-legislative and economic security, natural-resource and consumer potentials fall into the “Dissonance” group; infrastructure, institutional, innovation, finance potentials, and social security fall into the “Deprivation” group; tourist, industrial and labour potentials fall into the “Adaptation” group.
8. According to the objective assessment, the objective industrial, labour and tourist potentials, and criminal and social security have a statistically significant influence on the favourableness of the investment climate in Latvia, Lithuania, Belarus cross-border regions; the objective innovation, infrastructure potentials and criminal security influence the favourableness of the investment climate in other Latvia, Lithuania, Belarus regions. There is a linear relation between the values of the objective investment climate and the FDI volume: when there is improvement in the investment climate in Latvia, Lithuania, Belarus cross-border regions by 1%, the volume of the accumulated FDI increases by 1.53%; in other regions – when there is improvement in the investment climate by 1%, the volume of the accumulated FDI increases by 1.99%.

AUTORI

Edmunds Čižo	Mg. oec., Mg. iur., Ekonomikas un socioloģijas katedra, Daugavpils Universitāte, Daugavpils, Latvija edmundscizo@inbox.lv
Alona Eisenberg	Doktorante, Daugavpils Universitāte, Daugavpils, Latvija alonaeisenberg@hotmail.com
Svetlana Ignatjeva	Dr. phys., Docente, Informātikas katedras vadītāja, Daugavpils Universitāte, Daugavpils, Latvija svetlana.ignatjeva@du.lv
Lilija Kublickienē	Dr. sc. soc., Vecākā pētniece, Lietuvas Sociālo pētījumu centrs, Socioloģijas institūts, Viļņa, Lietuva lilija.kublickiene@gmail.com
Marzena Piotrowska-Trybull	Dr. hab., Vadības institūts, Vadības un komandēšanas fakultāte, Varšavas universitāte, Varšava, Polija m.trybull@akademia.mil.pl
Andrius Segalovicus	Doktorants, Lietuvas sociālo pētījumu centrs, Viļņa, Lietuva andrius.segalovicus@gmail.com
Anastasiia Simakhova	Ekonomisko zinātņu kandidāts, docents, Olesja Gončara Dņepras Nacionālā universitāte, Ekonomikas un tautsaimniecības vadības fakultāte, Dņepra, Ukraina simakhova_a@fme.dnulive.dp.ua
Stanisław Sirko	Prof. dr. hab., Varšavas universitātes Vadības institūta direktors, Vadības un komandēšanas nodaļa, Varšava, Polija s.sirko@akademia.mil.pl
Nataliia Stukalo	Dr. oec., Olesja Gončara Dņepras Nacionālā universitāte, Starptautiskās ekonomikas fakultātes dekāns, Dņepra, Ukraina nstukalo@ukr.net
Alina Žvinklienē	Dr. sc. soc., Vadošā pētniece Lietuvas Sociālo pētījumu centra socioloģijas institūtā, Lietuva alinazvin@gmail.com

AUTHORS

- Edmunds Čižo** Mg. oec., Mg. iur., Department of Economic Sciences and Sociology, Daugavpils University, Daugavpils, Latvia
edmundscizo@inbox.lv
- Alona Eisenberg** Doctoral student, Daugavpils University, Daugavpils, Latvia
alonaeisenberg@hotmail.com
- Svetlana Ignatjeva** Dr. Phys. Head of Computer Science Department of Daugavpils University, Daugavpils, Latvia
svetlana.ignatjeva@du.lv
- Lilija Kublickienė** Dr. sc. soc., Senior Researcher at the Institute of Sociology of Lithuanian Social Research Centre, Vilnius, Lithuania
lilija.kublickiene@gmail.com
- Marzena Piotrowska-Trybull** Dr hab., Institute of Management, Faculty of Management and Command, War Studies University in Warsaw, Warsaw, Poland
m.trybull@akademia.mil.pl
- Andrius Segalovicius** Doctoral student, Lithuanian Social Research Center, Vilnius, Lithuania
andrius.segalovicius@gmail.com
- Anastasiia Simakhova** Associate professor of the Department of Economics and Management of National Economy of Oles Honchar Dnipro National University, Candidate of Economic Sciences, Dnipro, Ukraine
simakhova_a@fme.dnulive.dp.ua
- Stanisław Sirko** Prof. dr hab., Director of the Institute of Management of the Faculty of Management and Command of War Studies University in Warsaw, Poland
s.sirko@akademia.mil.pl
- Nataliia Stukalo** Dean of the faculty of International Economics of Oles Honchar Dnipro National University, Doctor of Economic Sciences, professor, Dnipro, Ukraine
nstukalo@ukr.net
- Alina Žvinklienė** Dr. sc. soc., Leading Researcher at the Institute of Sociology of Lithuanian Social Research Centre, Vilnius, Lithuania
alinazvin@gmail.com

АВТОРЫ

- | | |
|-----------------------------------|---|
| Эдмундс Чижо | Mg. oes., Mg. iur., Кафедра экономики и социологии, Даугавпилс, Даугавпилсский Университет, Латвия
edmundscizo@inbox.lv |
| Алена Айзенберг | Докторантка, Даугавпилсский Университет, Латвия
alonaeisenberg@hotmail.com |
| Светлана Игнатьева | Dr. Phys., доцент, Руководитель кафедры информатики, Даугавпилсский Университет, Латвия
svetlana.ignatjeva@du.lv |
| Лилия Кублицкиене | Доктор социальных наук, старший исследователь в Институте социологии Центра социальных исследований Литвы, Литва
lilija.kublickiene@gmail.com |
| Алина Жвинклиене | Доктор социальных наук, ведущий исследователь в Институте социологии Центра социальных исследований Литвы, Литва
alinazvin@gmail.com |
| Андриус Сегаловициус | Докторант, Центр социальных исследований Литвы
andrius.segalovicus@gmail.com |
| Станислав Сирко | Dr. hab., prof. Директор Института Управления, Отдел Управления и Командирования, Академия Боевых Искусств, Польша
s.sirko@akademia.mil.pl |
| Маржена Пиотровска-Трыбуль | Dr. hab., Институт Управления, Отдел Управления и Командирования, Академия Боевых Искусств, Польша
m.trybull@akademia.mil.pl |
| Наталия Стукало | Доктор экономических наук, профессор, декан факультета международной экономики Днепропетровского национального университета имени Олеся Гончара, Днепр, Украина
nstukalo@ukr.net |
| Анастасия Симахова | Кандидат экономических наук, доцент кафедры экономики и управления народным хозяйством Днепропетровского Национального университета им. Олеся Гончара, Днепр, Украина
simakhova_a@fme.dnulive.dp.ua |

AUTORU IEVĒRĪBAI

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Turner J. H. (1974) *The Structure of Sociological Theory*. Homewood (Illinois): The Dorsey Press.

Raksti krājumos:

Turner R. H. (1990) A Comparative Content Analysis of Biographies. Øyen, E. (ed.) *Comparative Methodology: Theory and Practice in International Social Research*. London, etc.: Sage Publications, pp. 134–150.

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Bela B. (1997) Identitātes daudzbalisība Zviedrijas latviešu dzīvesstāstos. *Latvijas Zinātņu Akadēmijas Vestis*, A, 51, Nr. 5/6, 112.–129. lpp. (In Latvian)

Shmitt K. (1992) Poniātie politicheskogo. *Voprosy sotsiologii*, № 1, str. 37–67. (In Russian)

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Materiāli no interneta:

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Статьи оцениваются в соответствии с критериями научности: соответствие современному теоретическому уровню в изучении выбранной проблемы; достаточная эмпирическая база; оригинальность эмпирического материала; новизна и оригинальность гипотез, положений, рекомендаций; актуальность темы исследования. Оценивается также сама логика и ясность изложения. При отборе статей для публикации преимущество дается исследованиям фундаментального характера.

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Монографии (книги и брошюры):

Mills Ch. R. (1998) *Sociologicheskoe voobrazhenie*. Moskva: Strategii. (In Russian)

Turner J. H. (1974) *The Structure of Sociological Theory*. Homewood (Illinois): The Dorsey Press.

Статьи в сборниках:

Turner R. H. (1990) A Comparative Content Analysis of Biographies. Øyen, E. (ed.) *Comparative Methodology: Theory and Practice in International Social Research*. London, etc.: Sage Publications, pp. 134–150.

Статьи в журналах:

Bela B. (1997) Identitates daudzbalsta Zviedrijas latviesu dzivesstastos. *Latvijas Zinatnu Akademijas Vestis*, A, 51, Nr. 5/6, 112.–129. lpp. (In Latvian)

Shmitt K. (1992) Poniatie politicheskogo. *Voprosy sotsiologii*, № 1, str. 37–67. (In Russian)

Статьи в газетах:

Strazdins I. (1999) Matematiki pasaule un Latvija. *Zinatnes Vestnesis*, 8. marts. (In Latvian)

Материалы в Интернете:

Soms H. *Vestures informatika: Saturs, struktura un datu baze Latgales dati*. (In Latvian)
Dostupno: <http://www.dpu.lv/LD/LDpublik.html> (sm. 20.10.2002).

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