

# FÓRUM MANAŽÉRA

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*Teória  
a prax  
v riadení  
podniku*



Súčasnú prostredie turbulentných zmien vo všetkých oblastiach spoločenského života (spoločnosť, ekonomika, prudký rozvoj komunikačných technológií, prírodné katastrofy), navyše ovplyvnené globalizáciou a cyklickými krízami, vytvárajú úplne nové podmienky pre činnosť rôznych typov podnikateľských subjektov. Na to, aby boli podniky schopné reagovať na uvedené zmeny a zabezpečiť tak svoj dlhodobý udržateľný rozvoj, je potrebné významným spôsobom optimalizovať ich výkonnosť. Kľúčovým predpokladom optimalizácie výkonnosti podnikov v uvedených podmienkach je systematická starostlivosť o rozhodujúci faktor úspechu - ľudské zdroje.

Uvedená formulácia je často používaná, avšak čím ďalej tým ťažšie prakticky realizovateľná v konkrétnych podmienkach podnikateľských subjektov. Okrem vyššie uvedených faktorov totiž situáciu „komplikuje“ vplyv existencie a vzájomných interakcií generácií zamestnancov vyskytujúcich sa v podnikoch. V súčasnej dobe na trhu práce a teda aj v organizáciách rôzneho typu aktívne pôsobí niekoľko rôznych generácií zamestnancov, ktoré sa vyznačujú výraznými odlišnosťami najmä v oblasti hodnôt, postojojov k práci, k autoritám, v prístupe k realizácii úloh, v interpersonálnej komunikácii, v očakávaniach od zamestnávateľa a pod. Dané generácie zamestnancov v pracovnom procese na seba navzájom pôsobia či už v pozitívnom alebo negatívnom zmysle, avšak v praktických podmienkach jednotlivých podnikov sa zvyčajne stretávame s negatívnymi prejavmi vzájomných interakcií, ktoré sa odrážajú v podstate vo všetkých podnikových procesoch súvisiacich s prácou s ľuďmi, čo v konečnom dôsledku neumožňuje dosahovať požadovanú úroveň výkonnosti zamestnancov a tým aj výkonnosti celého podniku.

Uvedený trend bude ďalej pokračovať, pretože v období niekoľkých nasledujúcich rokov sa predpokladá významná zmena v pomernom zastúpení jednotlivých generácií na trhu práce. V roku 2020 bude generácia Y najpočetnejšou skupinou na trhu práce (na Slovensku viac ako 50% pracovnej sily) a zároveň sa očakáva príchod predstaviteľov generácie Z, označovanej aj ako „iGeneration“, u ktorej zatiaľ nepoznáme jej presné ohraničenie, pretože dosiaľ neprenikla na pracovný trh, avšak dá sa predpokladať, že vymedzí ďalší významný míľnik, pretože „pripasť“ medzi generáciou Z a predchádzajúcou generáciou bude väčšia ako všetky medzigeneračné rozdiely doteraz sa vyskytujúce na pracovnom trhu.

Napriek uvedenému však na druhej strane vzájomná interakcia generácií zamestnancov s diametrálne odlišnými charakteristikami vytvára aj potenciál na významné zlepšovanie ich výkonnosti, čo môže mať výrazný pozitívny dopad na zvyšovanie

konkurencieschopnosti podniku, ktorého manažment dokáže tento potenciál využiť.

Uvedené podmienky predstavujú pre prax, ale aj pre výskumné a vzdelávacie inštitúcie, veľkú výzvu, pretože v oblasti riadenia ľudských zdrojov vyvolávajú potrebu hľadať nové, inovatívne riešenia, ktoré by zabezpečili udržateľný rozvoj a to tak jednotlivých zamestnancov, organizácií, ako aj celej spoločnosti. Iba podniky, ktoré kladú a budú kladť dôraz na zlepšovanie kvality pracovného života, na zvyšovanie uspokojovania zamestnancov s vykonávanou prácou, na zlepšovanie vzťahov medzi zamestnancom a zamestnávateľom, na zlepšovanie pracovných a medziľudských vzťahov na pracovisku, môžu byť v súčasných podmienkach úspešné.

V záujme prispieť k hľadaniu systematických riešení v danej oblasti sú príspevky v aktuálnom čísle časopisu Fórum manažéra prevažne orientované na problematiku diversity manažmentu, age manažmentu, personálneho marketingu, tvorby a riadenia multikultúrnych pracovných tímov a pod.



Trnava,  
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Ústav priemyselného inžinierstva a manažmentu  
MTF STU

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## FINANCIAL ANALYSIS VIA PREDICTION MODELS

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### ABSTRACT

*Every business's main objectives are to earn profits it has forecast and achieve the budgeted liquidity, while either increasing or maximizing its market value. These objectives include placing the business entity in an effective and competitive position. Playing a role in achieving these objectives is a financial and economic analysis of business entities. Such an analysis evaluates both an undertaking's earlier and future development. The theoretical part of this paper briefly describes the importance of financial analysis and its own objectives. Then we discuss the methodology of different ex ante financial analysis and individual credit scoring and bankruptcy models to determine a business entity's future financial position and creditworthiness. In the application part of the paper, we conducted an ex-ante financial analysis at a specific industrial business entity selected by us. Following up on the results of this analysis, alternative measures were proposed to improve the business entity's financial position.*

### KEY WORDS

*company, competition, business subject, ex ante financial analysis, credit scoring models, bankruptcy models*

### INTRODUCTION

The ability to forecast a business's financial position and its future solvency or insolvency derives from an assessment and interpretation of results achieved at present. These contain symptoms of further development. They have the form of different levels and dynamics in financial indicators applied to obtain an intermediary image of the business's financial position.

Often a review of the past is not the only thing expected from a financial analysis, but also a forecast of the business's future, especially the company's ability to survive. In such a case, "classical" financial analysis using different ratios or groups of them is a too much appropriate approach: each individual group of indicators monitors only partial aspects of a business's financial health and the large number of ratios used rather obscures and complicates the overall assessment. For this reason there have been a number of studies carried out in an effort to find a single synthetic indicator that concentrates on all strengths and weaknesses of a company's financial health, where its value would clearly signal the business's ability or inability to avoid bankruptcy. (Mrkvička, 2006)

This paper aims to provide a basic understanding of ex ante financial analysis and then evaluates the expected future development of a business entity based on prediction models to determine its overall creditworthiness as well as to detect developments that could lead to bankruptcy. Consequently, we can reveal strengths and opportunities a business entity could exploit, as well as define weaknesses and threats that could put it into a difficult situation, while following up on the results in order to suggest steps to take for improving the system of analyzing business entities financially and economically.

### MATERIALS AND METHODS

This paper uses basic scientific methods to analyze, synthesize, induce, deduct, compare and hypothesize. A synthesis of knowledge and experience allows us to obtain a theoretical base for meeting the targets we have set. An ex ante financial-economic analysis was conducted of an industrially focused joint-stock company which produces vessels and vessel components for the chemistry and energy sector. The paper also applies a method of comparing the observed company's financial performance by year.

By making inductions, deductions and hypotheses from analysis results, we will draw conclusions and propose measures to improve the system of analyzing business entities financially and economically.

### 1 RESULTS AND DISCUSSION

There are dozens of theoretical models trying more or less to successfully assess business performance. The result is the so-called "credit scores" and bankruptcy indicators investors and creditors use to orient themselves quickly and to classify enterprises by their quality (performance and credibility). These models aim to predict financial position using credit scores and bankruptcy indicators, based on a fundamental analysis of year-end financial statements. (Kotulič, 2010)

#### Ex Ante Financial Analysis

There are dozens of theoretical models trying more or less to successfully assess business performance. The result are so-called credit scores and bankruptcy indicators, which are used by investors and creditors to orient themselves quickly and to classify

enterprises by their quality (performance and credibility). These models aim to predict financial position using credit and bankruptcy indicators, based on a fundamental analysis of year-end financial statements. (Kotulič, 2010)

### 1.1 Credit Scoring Models

Credit scoring models diagnose a company's financial health. They attempt to derive a score from resultant indicators in order to establish an assessed business's creditworthiness. Credit scoring models are founded on values derived by assigning points to each individual ratio, with either the average or sum of these points indicated in a score used to judge the enterprise's financial credibility. The models allows companies in the same business sector to be compared with each other. Many credit scoring models have been published, with the Králikov Test

and Tamari Model being among the best known. (Hrdý, 2009)

#### 1.2.1 Quick Test

A method quite frequently used in Western Europe is the Quick Test. As the name implies, it is a global method that can be conducted quickly because it works with only four financial indicators and a simple scoring scale. The four financial ratios are listed below (Zalai, 2010):

- Financial stability: equity ratio (EK/TK); debt maturity period (percentage of borrowed capital less liquid assets to cash flow BK - LA/ CF)

Financial performance: cash flow margin ratio (cash flow to overall performance) (CF/P); return on total capital (earnings after interest and taxes to total capital)

Table 1 Scale

Indicator	Scale - points				
	very good	good	moderate	poor	pending insolvency
	(1)	(2)	(3)	(4)	(5)
Equity ratio	> 30%	> 20%	> 10%	< 10%	negative
Debt maturity period in years	< 3 yrs	< 5 yrs	< 12 yrs	> 12 yrs	> 30 yrs
Cash flow margin ratio	> 10%	> 8%	> 5%	< 5%	negative
Return on capital	> 15%	> 12%	> 8%	< 8%	negative

Source: (Zalai, 2010)

The scale implies the lower the number of points an enterprise receives, the more positive its situation in terms of its financial future. The minimum number of points that can be received is 4 and the maximum number is 20. The indisputable advantage of this method is its simplicity and the speed in which can be calculated, which allows the observed company's position and future prospected to be interpreted. However, taking advantage of the simplicity and fast calculation cannot be overstated when a comprehensive view of the observed company and its prospects for the future need to be obtained. To increase the reliability of the calculations, we increased the number of indicators and also approximated the point scale. (Baran, 2015)

#### 1.2.2 Solvency Index

The solvency index is very widely used in Germany, Switzerland and Austria and is essentially a simplified Beermann discriminant function. The discriminant function quantifying index (B) has the form below (Kotulič, 2010)

$$B=1.5*x_1+0.08*x_2+10*x_3+5*x_4+0.3*x_5+0.1*x_6$$

Where:  $x_1$  = cash flow / borrowed capital  
 $x_2$  = total capital / borrowed capital  
 $x_3$  = EBT / assets  
 $x_4$  = EBT / production revenue  
 $x_5$  = inventories / prod. revenue  
 $x_6$  = production revenue / assets

An enterprise whose B value is less than 0 is moving toward bankruptcy. The greater B is, the better the prognosis for the enterprise's financial position. The criteria for interpreting solvency index values are as follows (Kotulič, 2010):

- If B is greater than 3, the financial position of the enterprise is extremely good;
- If B is between 2 and 3, the financial position of the enterprise is very good;
- If B is between 1 and 2, the financial position of the enterprise is good;
- If B is between 0 and 1, the enterprise has some problems;
- If B is between -1 and 0, the financial position of the enterprise is poor;
- If B is between -2 and -1, the financial position of the enterprise is very poor;
- If B is less than -2, the financial position of the enterprise is extremely poor.

### 1.3 Bankruptcy Models

Bankruptcy models try to predict potential bankruptcies early and warn companies about them in time. They are derived from the fact that every company threatened with bankruptcy reports symptoms typical for bankruptcy for some time beforehand. The most common symptoms include problems with current liquidity and net working capital, along with difficulties with return on invested capital. The models most often used include the Altman model and Credibility Index (Hrdý, 2009)

#### 1.3.1 Altman Z-Score Model

The Z-score is generated by converting either global or overall score indexes, where the calculation is defined by the sum of five common ratios that are assigned a different weight, with the largest being return on total capital. The intention behind the original Altman model was to distinguish very easily businesses that were heading for bankruptcy from companies whose probability of going bankrupt was minimal. Altman used a discrimination method to predict business-related risk. The method defines weights for all individual ratios, which are then included as variables in the model. Besides taking the changing economic situation in each business and country into consideration, the model itself has had to be also adjusted over its existence. (Růčková, 2005)

The Altman model for companies publicly traded on a stock exchange is (Farkašová, 2007):

$$Z = 1.2 * x_1 + 1.4 * x_2 + 3.3 * x_3 + 0.6 * x_4 + 1 * x_5$$

Where:  $x_1$  = net working capital / assets  
 $x_2$  = retained earnings / assets  
 $x_3$  = EBIT / assets  
 $x_4$  = market value of equity / borrowed capital  
 $x_5$  = sales / total capital

If:

Z is greater than 2.99, the enterprise's financial position is good

Z is between 1.81 and 2.99, it is in the area of ambivalent results (gray area) and bankruptcy is possible

Z is less than 1.81, its financial situation is critical and bankruptcy is quite probable

For companies whose shares are not publicly traded, the Altman model is (Farkašová, 2007):

$$Z' = 0.717 * x_1 + 0.847 * x_2 + 3.107 * x_3 + 0.420 * x_4 + 0.998 * x_5$$

If:

Z is greater than 2.99 the enterprise's financial position currently looks good in the future

Z is between 1.81 and 2.99, it is in the gray area of ambivalent results

Z is less than 1.81, its financial position is poor and the enterprise can be threatened with bankruptcy.

#### 1.3.2 Credibility Index

Like the Altman model, the IN Index is expressed in an equation that includes debt ratios, profitability, liquidity and activity. Each indicator is assigned a weight that is the indicator's weighted average in each sector. The index is often modified, based on the year when it was constructed. In 2002, IN01 was constructed from the combined IN95 and IN99 and in 2005 modified slightly to become IN05, which can be expressed as follows (Hrdý, 2009):

$$IN05 = 0.13 * x_1 + 0.04 * x_2 + 3.97 * x_3 + 0.21 * x_4 + 0.09 * x_5$$

Where:  $x_1$  = total assets / borrowed capital  
 $x_2$  = EBIT / borrowing costs  
 $x_3$  = EBIT / total assets  
 $x_4$  = income / total assets  
 $x_5$  = current assets / current liabilities + short-term loans and assistance

Forecasting financial health is an important tool that can help any company foresee an impending crisis. With sufficient advance warning, a capable management can take steps to avert an impending difficult situation (Farkašová, 2007). Values calculated by the Altman model are influenced primarily by a coefficient of k-3, which for companies whose shares are traded on a stock exchange is 3.3 and for other companies 3.107, and with a ratio of  $x_3$  - EBIT (earnings before interest and taxes) / assets. Therefore, a reader would see the decisive factor for the ratio to be  $x_3$  as before tax profit. When the Altman model is used under conditions present in Slovakia and the Czech Republic, experience has shown that businesses will tend to report lower profits than in other countries.

## 2 RESULTS AND DISCUSSION

In this chapter, we interpret ex ante financial-economic analysis and, where it applies, predictive and diagnostic models in the example of the observed business entity. Research consists of the results of calculations, graphs and subsequent evaluation of the progress and trends derived from the monitored indicators. We drew the data for financial and economic analysis from the logical links that exist between financial statements, i.e. the balance sheet and income statement. For the greatest possible relevance, we used statements covering the 2009-2014 fiscal years.

However, it should be noted that results from the calculated models can be questionable or debatable because the company may be specific in its type. For example, its production cannot be really compared with others. Likewise, the resulting values may be biased since most of the assembled prediction models are based on businesses that operate in the United States.

## 2.1 Credit Scoring Models

Credit scoring models let us evaluate the analyzed company to determine whether the financial position

is favorable or unfavorable. In this part, the Quick Test, Solvency Index and Altman Model were used.

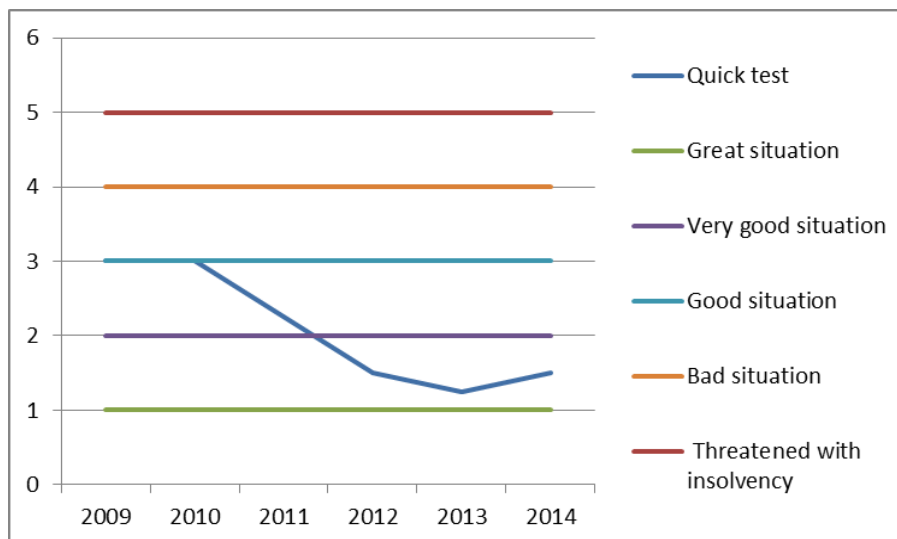
### 2.1.1 Quick Test

As is evident in the table, this model is based first on assessing the company's financial position and then its income flow, with an average score subsequently assessed to give us its overall situation.

**Table 2** Quick Test Assessment

Quick test	2009	2010	2011	2012	2013	2014
- equity ratio	40,88	32.99	49.92	40.46	36.20	45.06
Score	1	1	1	1	1	1
- debt maturity period in years	9.42	10.59	4.23	3.26	3.18	3.14
Score	3	3	2	2	2	2
- cash flow margin ratio	3.20	4.15	8.10	11.29	12.12	13.52
Score	4	4	2	1	1	1
- return on capital	3.74	3.91	6.76	12,30	16.59	14.21
Score	4	4	4	2	1	2
<b>total score</b>	<b>12</b>	<b>12</b>	<b>9</b>	<b>6</b>	<b>5</b>	<b>6</b>
<b>average score</b>	<b>3</b>	<b>3</b>	<b>2.25</b>	<b>1.5</b>	<b>1.25</b>	<b>1.5</b>

Source: Own



**Graph 1** Quick test (own source)

Having made calculations and evaluated the method, it could be said the first two years analyzed, namely 2007 and 2008, were financially the weakest, yet the company still enjoyed a good financial position. In the years when the company was in this condition, the problems were described as mainly income related, with the cash flow margin ratio and return on capital influenced generally by low net income in the first two years. Likewise, the debt maturity period was unfavorable. 2012, 2013, 2014 can be

considered successful in terms of the company's financial stability and profitability, when its values stood at 1.5, 1.25 and 1.5, in the range of a very good financial position. Accordingly, the positive figures seen in the first indicator put the company in every observed year in an excellent situation.

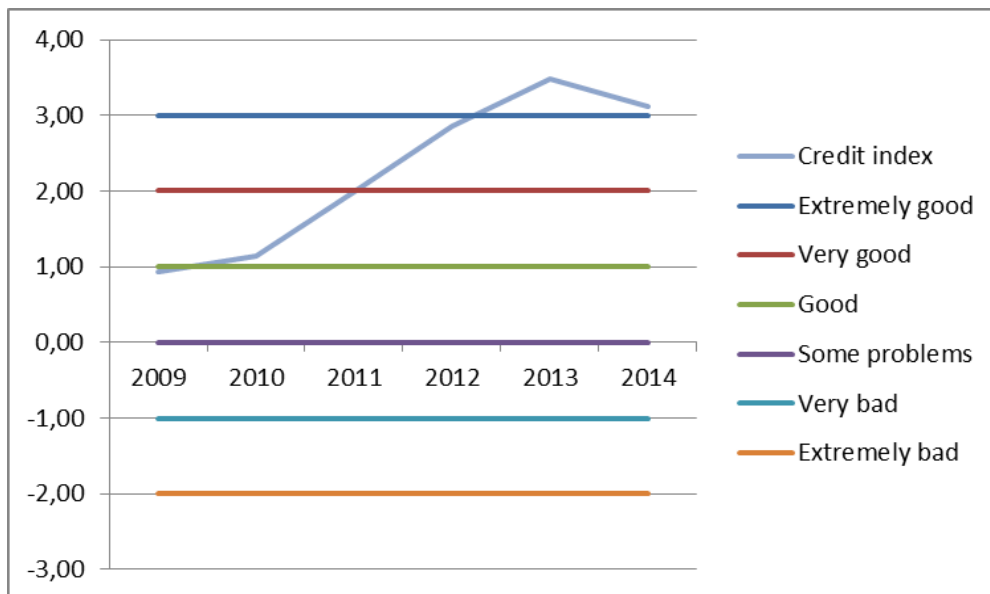
**2.1.2 Solvency Index**

The calculation of the six ratios in this discriminatory function are captured in the table below.

**Table 3** Solvency Index Assessment

	2009	2010	2011	2012	2013	2014
- x1	0.10	0.09	0.20	0.24	0.30	0.30
- x2	1.69	1.49	2.00	1.68	1.57	1.82
- x3	0.03	0.05	0.10	0.15	0.21	0.17
- x4	0.02	0.04	0.08	0.12	0.13	0.14
- x5	0.25	0.28	0.22	0.42	0.13	0.14
- x6	1.61	1.36	1.23	1.23	1.55	1.16
<b>result</b>	<b>0.94</b>	<b>1.15</b>	<b>1.99</b>	<b>2.86</b>	<b>3.49</b>	<b>3.12</b>
<b>score</b>	<b>some problems</b>	<b>good</b>	<b>good</b>	<b>very good</b>	<b>extremely good</b>	<b>extremely good</b>

Source: Own



**Graph 2** Solvency Index (own source)

The company's financial situation becomes better as the values in this model move higher.

An evaluation of the table and graph clearly show the assessment of its financial position to be very positive. In 2009, the company appeared to have partially minor problems when the value reached 0.94, due to low earnings before taxes (EBT) in this period. Improvement in its financial situation has been seen by us ever since that year. In 2013, the value reached the highest point for this company of 3.49, falling to 3.12 in 2014, the most recent year, as a consequence of a decline in production and growth of assets although values still remain high and we can say its financial position is extremely good.

**2.2 Bankruptcy Models**

Bankruptcy models essentially help users detect financial problems in a business that is being analyzed before it becomes fully apparent there, possibly causing it to become bankrupt in the worst-case scenario.

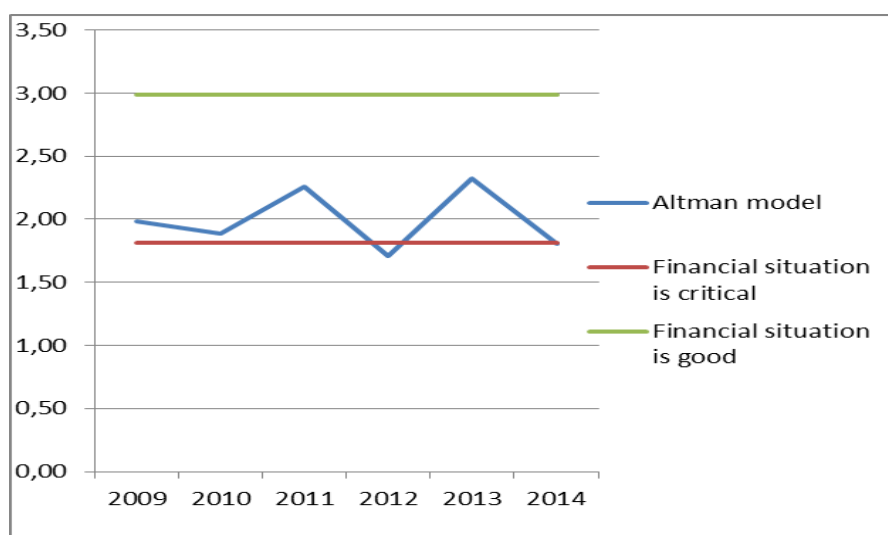
**2.2.1 Altman Z-Score Model**

To calculate the Altman financial health model, we used a formula for companies whose shares are not traded on a capital market, since the observed company has not issued such shares

**Table 4** Altman Model Assessment

	2009	2010	2011	2012	2013	2014
- x1	0.28	0.38	0.44	0.23	0.12	-0.06
- x2	0.16	0.12	0.19	0.14	0.01	0.02
- x3	0.04	0.06	0.10	0.15	0.21	0.17
- x4	0.04	0.05	0.13	0.20	0.26	0.26
- x5	1.50	1.32	1.42	0.87	1.48	1.20
<b>score</b>	<b>1.98</b>	<b>1.89</b>	<b>2.26</b>	<b>1.71</b>	<b>2.33</b>	<b>1.81</b>
	gray area	gray area	gray area	critical	gray area	gray area

Source: Own

**Graph 3** Altman model (own source)

After the calculations were made and subsequently assessed, the graph shows the figures from this index to be fluctuating greatly, with the index slightly declining below the gray area in 2012. The drop was caused mainly by the ratio of sales to assets, where the company has high-valued work in progress and internally generated semi-finished goods available. Due to these inventories, the company moved into the "gray zone" in 2012. Looking at 2010 and 2014 figures, when the value of this index closely approached the edge of putting the company in a critical financial position, the main causes were a sharp drop in trade receivables and growth in other

current provisions. receivables and growth in other current provisions. In light of such fluctuation, it is difficult to predict the company's future direction.

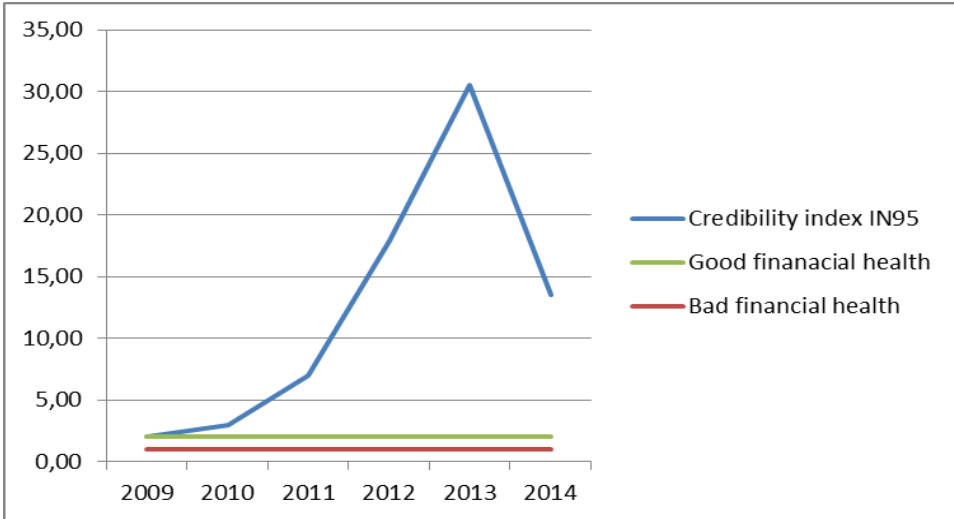
### 2.2.2 IN95 Credibility Index

This index provides information mainly to creditors, where the table evaluates credit scores in particular.

**Table 5** IN95 Credibility Index Assessment

	2009	2010	2011	2012	2013	2014
- x1	1.69	1.49	2.00	1.68	1.57	1.82
- x2	1.94	7.97	30.78	103.71	242.30	90.55
- x3	0.05	0.10	0.31	0.67	0.32	0.30
- x4	1.76	1.41	1.25	1.25	1.59	1.21
- x5	1.68	2.00	2.85	1.40	1.20	0.89
- x6	0.00	0.00	0.02	0.01	0.01	0.00
<b>score</b>	<b>2.04</b>	<b>3.00</b>	<b>7.00</b>	<b>17.92</b>	<b>30.52</b>	<b>13.48</b>
	good health	fin. health	good health	fin. health	good health	fin. health

Source: Own



Graph 4 IN95 Credibility Index (own source)

The company's activities led it to cross the edge to becoming financially healthy in 2009, the first observed year. Each year the value climbed greatly until it reached 30.52, taking it far off the scale. This increase was caused to a predominant degree by growing earnings before interest and taxes (EBIT) and low, falling borrowing costs, which sank to a very small value in 2013. In 2014, the most recently

observed year, the value had dropped to 13.48 due to a moderate rise in borrowing costs.

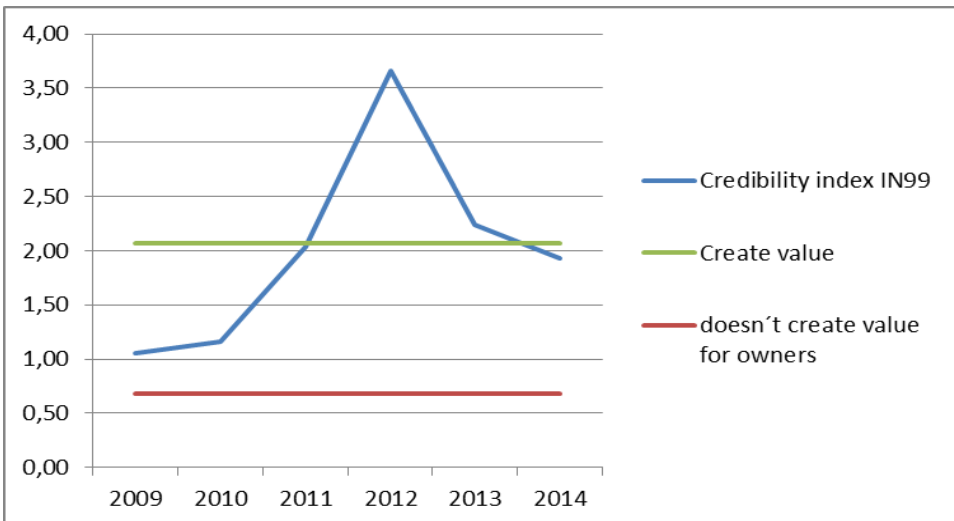
**2.2.3 IN99 Credibility Index**

The company owners mainly drew information from the IN99 model because our calculations answered the question of whether the company creates value for them.

Table 6 IN99 Credibility Index Assessment

	2009	2010	2011	2012	2013	2014
- x1	1.69	1.49	2.00	1.68	1.57	1.82
- x2	0.05	0.10	0.31	0.67	0.32	0.30
- x3	1.76	1.41	1.25	1.25	1.59	1.21
- x4	1.68	2.00	2.85	1.40	1.20	0.89
<b>score</b>	<b>1.05</b>	<b>1.16</b>	<b>2.04</b>	<b>3,66</b>	<b>2,24</b>	<b>1.93</b>
	gray area	gray area	gray area	creates value	creates value	gray area

Source: Own



Graph 5 IN99 Credibility Index (own source)

In the first year of observation, the company scored 1.05. That was the closest the company ever came to the edge of not creating value for its owners. Subsequently, in 2010 and 2011, the value grew, climbing to the border of the gray area. In 2012 there was a large increase caused by the ratio of EBIT to total capital, due to a large rise in sales. In two other years, the ability to create value dropped and in 2014 it fell into the ambivalent gray zone as a

consequence of a decline in work in progress and semi-finished goods.

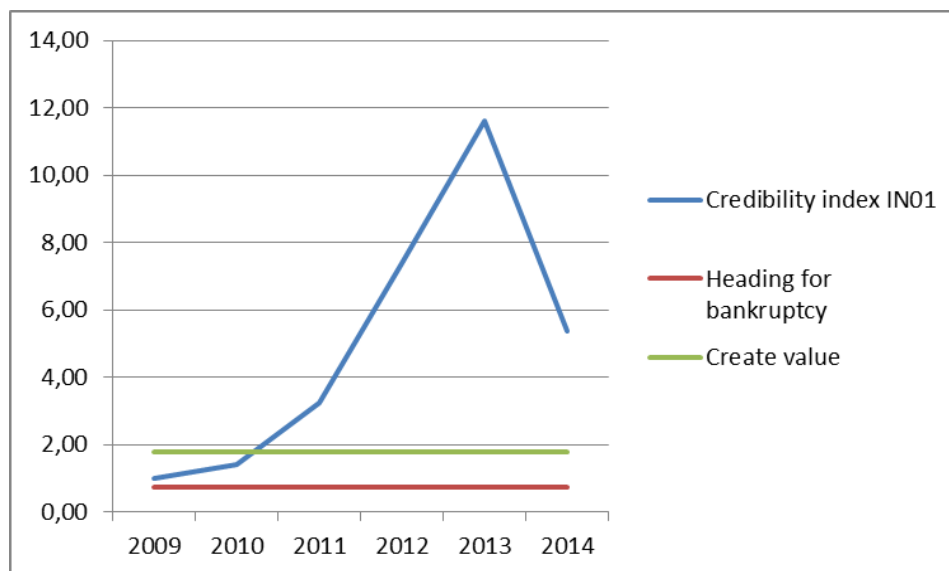
#### 2.2.4 IN01 Credibility Index

This index has the properties of those earlier mentioned and is set up to evaluate industrial enterprises

**Table 7** IN01 Credibility Index Assessment

	2009	2010	2011	2012	2013	2014
- x1	1.69	1.49	2.00	1.68	1.57	1.82
- x2	1.94	7.97	30.78	103.71	242.30	90.55
- x3	0.05	0.10	0.31	0.67	0.32	0.30
- x4	1.76	1.41	1.25	1.25	1.59	1.21
- x5	1.68	2.00	2.85	1.40	1.20	0.89
<b>score</b>	<b>1.00</b>	<b>1.40</b>	<b>3.23</b>	<b>7.38</b>	<b>11.61</b>	<b>5.36</b>
	gray area	gray area	creates value	creates value	creates value	creates value

Source: Own



**Graph 7** IN01 Credibility Index (own source)

The credibility index in 2009 and early 2010 was occupying the gray zone. This condition was caused by low EBIT. Subsequently, in 2011, 2012, 2013, it rose to 11.61, creating more value. Last year it fell to 5.36, due mostly to a ratio of high earnings to low borrowing costs, although it still remains high.

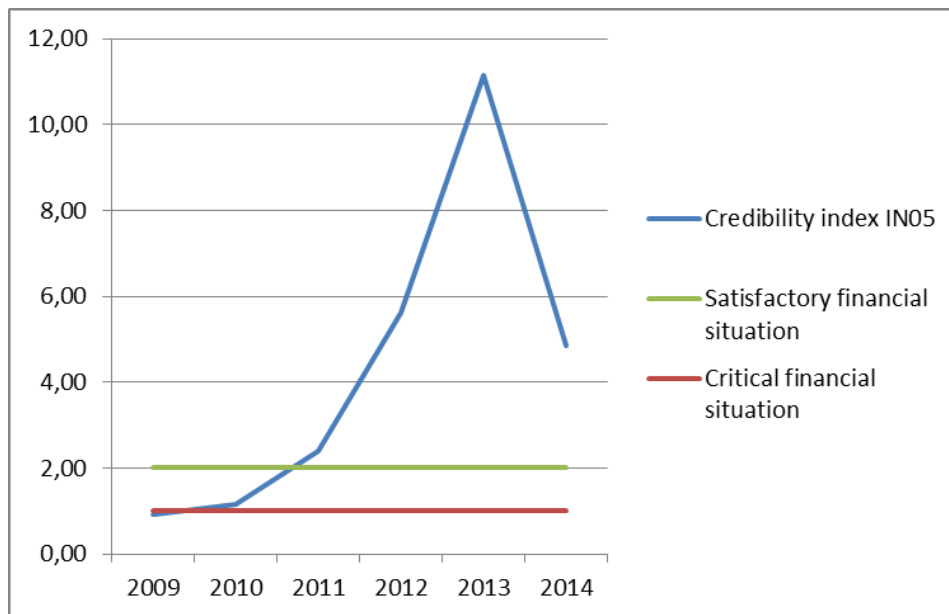
#### 2.2.5 IN05 Credibility Index

IN05 is the latest variant in the credibility index. The structure of the calculating formula shows it to be just an update of IN01. The values calculated from this model are shown in the table on the next page.

**Table 8** IN05 Credibility Index Assessment

	2009	2010	2011	2012	2013	2014
- x1	1.69	1.49	2.00	1.68	1.57	1.82
- x2	1.94	7.97	30.78	103.71	242.30	90.55
- x3	0.02	0.04	0.09	0.15	0.20	0.16
- x4	1.76	1.41	1.25	1.25	1.59	1.21
- x5	1.73	2.04	2.98	4.47	1.25	0.99
<b>score</b>	<b>0.91</b>	<b>1.17</b>	<b>2.39</b>	<b>5.62</b>	<b>11.15</b>	<b>4.85</b>
	gray area	gray area	good fin. pos.	good fin. pos.	good fin. pos.	good fin. pos.

Source: Own

**Graph 7** IN05 Credibility Index (own source)

The IN05 Credibility Index indicates the company was in 2009 on the edge of being in a critical financial position. The 0.91 figure generated that year turned out to be the lowest calculated. Starting in 2010, the company escaped the gray zone and, starting in 2013, IN05 expansively rose to 11.15 to reach significantly above the edge of the unfavorable financial position zone. This growth could have been the result of the ration between earnings and borrowing costs, which saw progress similar to IN05. In the most recently observed year, the value fell to 4.85 due to higher borrowing costs.

## CONCLUSION

The conclusion can be drawn from the financial analysis that the company enjoyed a good financial position over the six years it was being observed, although some significant changes did occur in individual years.

Results from prediction models charting the company's future development imply for us that it has spent the last three years in excellent financial

position and there is no threat of it going bankrupt. In 2013, a small decline was noted due to a moderate rise in borrowing costs. The exceptions are the IN 99 credibility index, where the company fell into the gray zone in the final year, and the Altman model, which shows the company to have been in the gray zone in 2012 and to be in the critical zone with an uncertain future, although this situation could be caused by the model having itself been constructed with a focus on businesses operating in the United States.

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## PRESENT AND FUTURE COMPETENCIES ON THE LABOUR MARKET

ČERNÁ Lúbia

### ABSTRACT

*Europe needs not only more skills, but also the right skills. As the nature of work changes, employers are increasingly looking for new key competences. This paper summarizes survey results diagnosis of skills and competencies of youth and expectations of employers analyse level of personal and social competences among secondary and university students. The aim of paper is preparation of recommendations, which will be the basis for preparation of set of tools for development of the personal and social competences of young people required by employers and present future skills. These new skills can be the great keys to open the job market's door and help people find their places in society.*

### Key words

*European Union, Young people, Labour market, Employer, Knowledge, Competences, Key competencies, Skills, Unemployment, Universities, Educational system, Qualifications Framework*

### INTRODUCTION

Youth unemployment represents not only a problem for young people who can't find work, but also for society as a whole. For young people, the loss of experience and income at the start of their careers will likely have long-term effects, reducing their lifetime earnings and standards of living, and even affecting their health and life expectancy. For society as a whole, the risk of a 'lost generation' is equally as dramatic. It represents lower tax income, higher benefits payments, and the loss of the combined efforts and skills of a wide cross-section of the population — providing further drag on the economy. The attention of policy makers at all levels is now firmly focused on the fact that the total of young people not in employment, education or training, is currently around 14 million in the EU. At the European level the policy response takes the form of programmes such as Erasmus+, and funding streams such as the Youth Employment Initiative (2013).

### KNOWLEDGE, SKILLS AND COMPETENCIES

**Knowledge** includes theory and concepts and tacit knowledge gained as a result of the experience of performing certain tasks. Understanding refers to more holistic knowledge of processes and contexts and may be distinguished as know-why, as opposed know-that. Each knowledge and learning hierarchy therefore rests on primary mental abilities, with the implicit assumption of a general learning transfer capacity and logic of knowledge acquisition. In all domains there is some logic that acquiring and comprehending new knowledge demands facilitating cognitive prerequisites and specific knowledge and skills. Given this interaction between knowledge and skills, their separation in a typology is not easy. (Winterton, 2006, p. 25) In everyday language, it has long been the practice to distinguish between information - data arranged in meaningful patterns - and knowledge - which has historically been

regarded as something that is believed, that is true (for pragmatic knowledge, that works) and that is reliable.

In the context of the European Qualifications Framework, knowledge is described as theoretical and/or factual.

**Skills** is a combination of ability, knowledge and experience that enables a person to do something well. (Boyatzis, Kolb, 1995, p. 4) Usually the term skill is used to refer to a level of performance, in the sense of accuracy and speed in performing particular tasks (skilled performance). Skilled performance has long been a subject of psychological enquiry and is of obvious interest to employers. (Winterton, 2006, p. 26) Skills mean the ability to apply knowledge and use know-how to complete tasks and solve problems. In the context of the European Qualifications Framework, skills are described as cognitive or practical skills.

Many experts in the fields of sociology, education, philosophy, psychology and economics have tried to define the notion of competence. Their efforts have been shaped by their educational and cultural backgrounds as well as their linguistic origins. Having analysed many definitions of the notion of competence, F. E. Weinert (OECD, 2001b, p. 45) concludes that across the disciplines "*competence is interpreted as a roughly specialised system of abilities, proficiencies, or skills that are necessary or sufficient to reach a specific goal.*" At the Council of Europe's symposium on key competencies, J. Coolahan (Council of Europe, 1996, p. 26) proposed that competence and competencies should be regarded '*as the general capability based on knowledge, experience, values, dispositions which a person has developed through engagement with educational practices.*' (Eurydice, 2002)

**Competence** means the proven ability to use knowledge, skills and personal, social and methodological abilities in work or study situations and in professional and/or personal development. In the context of the European Qualifications Framework, competence is described in terms of

responsibility and autonomy. A group of competencies that have attracted a great deal of attention in recent years are generic skills, also known as subject-independent or transversal competencies. They are not bound to any specific discipline, but can be applied to a whole range of subject areas and settings. Key competences are context-independent, applicable and effective across different institutional settings, occupations and tasks. These typically include basal competences, such as literacy, numeracy, general education; methodological competences, like problem solving, ITC skills; communication skills, including writing and presentation skills; and judgement competences, such as critical thinking. (Vinterton, 2006, p.33) Today's societies place challenging demands on individuals, who are confronted with complexity in many parts of their lives. What do these demands imply for key competencies that individuals need to acquire? Defining such competencies can improve assessments of how well prepared young people and adults are for life's challenges, as well as identify overarching goals for education systems and lifelong learning. (Rychen, Salganik, 2001, p. 4) Measuring competencies is rather complicated due to the

complex nature of the phenomena. In current literature on skills and competencies, many definitions and distinctions apply. For example, skills are in fact treated as one of the constituent elements of competencies, along with motivation, character traits, knowledge and behaviour. (Shmatko, 2013, p3) The labour market expects from graduates use of key competencies in their professional activities. (Markovic, 2015, p. 62).

### KEY COMPETENCES

The National Council for Adult Training approved in compliance with the European Union's and the European Union Council's Recommendation on the key competencies lifelong learning. The List of key competencies, common to various professions, a list that includes: *communication in the mother tongue, communication in foreign languages, mathematical competence and basic competences in science and technology, digital competence, learning to learn, social and civic competences, sense of initiative and entrepreneurship, cultural awareness and expression.* (EP, RE, 2006).

**Tab. 1** Learning outcome definition. (Source: Learning outcomes based on E.Q.F. and ECVET system)

LEARNING OUTCOME DEFINITION	Learning outcomes means statements of what a learner knows, understands and is able to do on completion of a learning process, which are defined in terms of knowledge, skills and competence				
BASIC CONCEPTS	E.Q.F. DEFINITION	E.U. PARLAMENT & COMMISSION DEFINITION	COLLOQUIAL LANGUAGE	BLOOM TAXONOMY	
KNOWLEDGE	In the context of EQF, <b>KNOWLEDGE</b> is described as Theoretical and/or factual knowledge.	<b>KNOWLEDGE</b> means the outcome of the assimilation of information through learning. Knowledge is the body of facts, principles, theories and practices that is related to a field of work or study.	<b>KNOWLEDGE</b> could be WHAT IS IT  In terms of verbs: KNOWS	Select	recognize
				mention	identify
				name	place
				define	describe
...					
SKILLS	EQF, <b>SKILLS</b> is described as Cognitive (involving the use of logical, intuitive and creative thinking) and practical skills	<b>SKILLS</b> means the ability to apply knowledge and use know-how to complete tasks and solve problems	<b>SKILLS</b> could be HOW CAN BE DONE  In terms of verbs: UNDERSTANDS	Explain	express
				interpret	distinguish
				classify	inter
				give	priority
				analyse	judge
relate	...				

	(involving manual dexterity and the use of methods, material tools and instruments).				
<b>COMPETENCE</b>	In the context of EQF, <b>COMPETENCE</b> is described in terms of Responsibility and autonomy	<b>COMPETENCE</b> means the proven ability to use knowledge, skills and personal, social and/or methodological abilities, in work in study situations and in professional and personal development	COMPETENCE it could be the APPLICATION OF KNOWLEDGE & SKILLS  In terms of verbs: APPLIES / DEVELOPS	Use	solve,
				produce	create
				organize	
				...	

However, key competencies are the only ones that should be considered for employment. Besides these, there are a series of other competencies and general abilities that an employee should have. These, however, can be more or less important, depending on the employee's profession, the nature of work, the position held. (Ciuhureanu, Gorski, Balteş, 2011)

These key competences are all interdependent, and the emphasis in each case is on critical thinking, creativity, initiative, problem solving, risk assessment, decision taking and constructive management of feelings. CEDEFOP is also preparing a complementary study providing projections of skill supply which help to identify skill mismatches and shortages. In market economies, product markets influence labour demand, and skill requirements are driven by employer choices in designing jobs (e.g. which tasks are delegated, which can be substituted by technology, which rely on nonroutine tasks). Job candidates and potential employees also come to the labour market with varying knowledge, competencies and abilities that can be broadly defined as "skills", or the outcome of individuals' choices of education, training and of their work experience, combined with innate abilities and preferences.

**Youth unemployment in Europe**

Youth unemployment is one of Europe's most pressing problems. In the current economic and financial crisis the lack of job opportunities has affected young people more than any other group in society; this is reflected in high and increasing youth unemployment rates and levels of precariousness. According to the latest Eurostat report<sup>1</sup> in June 2015, the youth unemployment rate was 20.7 % in

the EU-28 and 22.5 % in the euro area, compared with 22.1 % and 23.6 % respectively in June 2014. What means that 4.724 million young persons (under 25) were unemployed in the EU-28, of whom 3.181 million were in the euro area. Youth unemployment rates are generally much higher, even double or more than double, than unemployment rates for all ages. Some reasons for the large number of unemployed people under the age of 25 are country-specific, having in mind the differences in employment policies, educational systems and economic performance among EU Member States, however there are factors contributing to the high youth unemployment rates which are present throughout the whole EU. One obvious reason for the large number of unemployed young people is the recent crisis which caused economic slowdown and tightening of the labour market. However, the reasons of high rates of youth unemployment are more complicated and complex than just an economic conditions. The biggest obstacles that prevent young people from getting a job is the lack of professional experience, as well as mismatch between knowledge and skills of young people and requirements of employers.

The total unemployment rate in Slovakia amounted in September 2015 to 12,95 percent. This means that about 349.167 people available for immediate work are looking for a job – or rather (better to say) are registered at labour offices. 62.099 people younger as 25 years don't work.

The situation around Slovakia differs depending on regions. Some places there are workers lacking, in other places jobs are missing. The willingness to travel to get a job or to relocate has recently been surprisingly on the decline. The prevailing group of the unemployed is young people, especially

graduates who cannot apply their knowledge in practice.

A young person who is unemployed can expect to not only suffer lost wages for the period of unemployment but also lagging wages over the next decade due to their time spent unemployed. Young people out of work also fall behind on student loan payments, delay saving for retirement, and move home with their parents. Disadvantaged youth suffer these consequences disproportionately

## MATERIALS AND METHODS

Objectives of the conducted research and diagnosis of the level of competence of youth and the employers' needs include: a) investigation and determination of the level of personal and social competences young people from secondary schools and university students; b) collecting information about employers' assessment of the level of personal and social competences of young people entering labour market; c) collecting information about skills and competences of young people expected and required by employers; d) study whether the personal and social competencies of students studying either at a University or a College are the same competencies that the employers search for; e) preparation of recommendations, which will be the basis for preparation of set of tools for development of the personal and social competences of young people required by employers.

Each project partner (Poland, Malta, Slovakia, Italia) has prepared own research tools. This has guaranteed that tools will be adjusted to specific conditions of each project country. According to the project, partners were conducting research among representatives of 3 groups: students from secondary school, students from universities and employers.

The following study questions facilitated implementation of set objectives: a) What is the level of personal and social competences among secondary and university students moving into the labour market? b) What are the educational needs of secondary and university students? c) What competences do employers require from young adults starting their professional lives? d) How do employers assess the level of personal and social competences of young adults moving into the labour market?

On this paper we present result from research from Slovakia. Competence Model for pupil was identified which includes the following 14 competencies and for university students and employers 24 competencies.

## RESULTS

Students from secondary (vocation) school characterize ourselves as people with the following competencies: *competence to discover and*

*orientation in information, competency for cooperation and team work, competency for flexibility.* On the basis of the questionnaire and the responses of pupils, we found that pupils are absent following competencies: *competency for entrepreneurship and competency for proactive approach.* The surprise for us are the ratings of expressing an opinion: *I spend a lot of time browsing the Internet or „in the field“, trying to find if there is anything interesting, that might be useful for me.* This is in contrast if we compared *When I come across something new, I can find the necessary information.* We expect that students search for information concerning the work purposefully and necessarily only.

The analyse of university student questionnaires shows the relationship between work and study. 86% of students reported that they have work experience, but 33% said that their work is not related to the curriculum and 7% of students reported that the current work do not require a university education. Answers to the question *How does university prepare you in terms of the following competencies (knowledge, skills, abilities, capabilities)?* confirms the fact that universities do not prepare students to practice. Frequency of evaluation 6 points (high level of preparation) was low. 5 competences which have not received the university: *foreign language proficiency, language proficiency in their mother tongue, ability to work in a multicultural/international environment, entrepreneurship, to have a "nose" for new opportunities, mathematical proficiency.* 5 competencies with the highest level of student's interesting (6 point): *The ability of creative and flexible thinking and acting, the ability to apply professional knowledge in practice, ability to handle difficult situations and obstacles, ability to identify and solve problems, ability to take responsibility.* Answers of question: *What could be interested in your future employer?* have been unequivocal: *Foreign language proficiency, my work experience and practice.* Only 12 students mean, that the topic of his (her) thesis and his (her) research area could be interested in future employer. The results show what is important for employers. 50% of university students underline *The length of professional experience.* Others important facts are: *Recommendations, Previous short-term work experiences, image and behaviour.* Irrelevant facts for employers are: *Study results, a school which the student completed, the distance of residence.*

Young jobseekers from vocation or secondary schools have the following competencies (opinion of employers): *active approach to work, entrepreneurship, have a "nose" for new opportunities, customer orientation.* The lowest level of competencies in the opinion of employers: *Presentation skills, foreign language proficiency, mathematical knowledge, the ability to identify and solve problems.*

Young jobseekers from university have the following competencies (opinion of employers): *professional*

*theoretical and methodological knowledge, presentation skills, general knowledge and outlook.* The lowest level of competencies in the opinion of employers: *the ability to identify and solve problems, ability to resolve conflicts, mathematical knowledge.* Based on the research we see that the disproportion between the real needs of employers and training and education of school students. Employers have the following priorities: *Customer orientation, Be able to think and act economically/economic competence, The ability to identify and solve problems, Ability to communicate and negotiate with people, Presentation skills, Ability to resolve conflicts, The level of writing skills.* Students think that they will receive the following competences at the university: *Presentation skills, Ability to take responsibility, The ability to engage in teamwork, The ability of creative and flexible thinking and acting, The ability of independent decision-making.*

The analysis of secondary school and university students' competence tests as well as details interview with employers made it possible to draw the following conclusions: a) Secondary school students generally have an average and low level of social competences (communication, negotiation etc), low level creativity and originality but extensive work experience and high work motivation. b) University students are dissatisfied with your university or their university study program. c) University students show low and very low level of communication in foreign languages and entrepreneurship, to have a "nose" for new opportunities and high level of presentation skills and flexibility. d) Students' awareness of employers' expectations of young employees is definitely higher than secondary school students' e) Employers emphasise the importance of such competences as: consumer orientation, presentation skills, ability to communicate and negotiate with people, team work and writing skills. f) Employers assess young adults' theoretical knowledge, the skills to work with information and computer skills as good, however, practical application mathematical and technical knowledge as much worse. g) For employers are relevant the length of professional experience and recommendations, irrelevant are study results, topic of these, experience from voluntary work

## DISCUSSION

The development of youth unemployment is influenced by inappropriate cross-references between education systems and the labour market. The existence of appropriate skills is the most important requirement for employment growth.

1. The link between the labour market and education should be improved by regular analysis of hard market data, such as salaries of graduates and graduates' unemployment rates by educational fields and schools.
2. The selection of a suitable area of study has an important role to play even though there is an

appropriate awareness of the labour market and increasing issues in the structure of unemployment.

3. Study programs in schools and universities should be enriched with elements helping young people to shape their personal and social competences;
4. It is necessary to connect formal and informal education, to better connect the educational system with practical knowledge and support practically oriented subjects and skills, to raise awareness of parents when it comes to responsible and practically-applicable selection of studies for their children, to realise career advice that would encompass both parents and children, and students.
5. Various forms of non-scientific activities of students should be promoted and supported by educational institutions and NGOs. Students and pupils should be encouraged to gain and develop their competences and skills not only in formal education, but also by participating in voluntary work, internships, placement, international exchanges. Young people should be informed about benefits from these forms of activities;
6. Slovakia's experience, while worse than others, is not dramatically different from the situation elsewhere. Young people have been encountering problems finding a job for a long time in the majority of EU member states. Internships, with a weak prospect of turning into a real job, are widespread in many older EU member states. The Youth Guarantee is not a bad policy. The question is whether in the individual states the scheme is going to change the approach to labour market policy and improve the connectivity of labour market needs and education of school graduates, or whether it will, perversely, lead dropouts and graduates into a never-ending chain of internships. The example of Slovakia, where the government never provided a complex framework for school-to-work transitions even in the face of staggeringly high youth unemployment, is not encouraging. Policy makers should use the momentum provided by the ongoing discussion on the Youth Guarantee to pressure the weak-performing member states into a range of further labour market reforms.
7. Finally, social dialogue is a key instrument for mobilising social partners to invest in the right skills through education and lifelong learning. The Commission will invite social partners to develop joint initiatives to promote skills forecasting and upgrading, and to accompany short-term restructuring and will also consult with social partners at the sectoral level.

The 21st century is filled with opportunities and challenges, asking of different knowledge and competencies to participants. These new skills can

be the great keys to open the job market's door and help people find their places in society.

The Future of Youth Employment report offers an in-depth look at the changing nature of work in the United States - from microwork, to new coordination and automation technologies, and beyond. The report explores challenges and opportunities these changes present for poor and vulnerable youth, and suggests policies and actions corporations, governments, and non-profits can take to ensure positive futures for them. The key elements of each of the four scenarios of report are as follows:

- Increasing competition and automation force workers to continuously upgrade skills or risk losing out on opportunities:
  - a) Labour market favours high-skill employees in certain growth sectors.
  - b) Job market is highly fluid with abundant new opportunities.
  - c) Worker skills must be constantly upgraded.
  - d) Education expands from institutions into online and community spaces.
  - e) Alternative credentialing grows and is increasingly accepted.
- Increasing automation reducing the number of both low- and high-skill jobs is grossly mishandled and results in a deep social and economic divide.
  - a) Growing automation reduces knowledge work and minimum-wage jobs.
  - b) More college students graduate but find their degrees unmarketable.
  - c) Permanent underclass of detached individuals grows.
  - d) Governance faces a crisis and is unable to address needs in a systematic way.
  - e) Informal economy and alternative currencies grow
- Highly networked and internally coordinated firms become efficient economic forces and major employers of coordinated workforces.
  - a) With few new economic growth opportunities, firms focus on cutting costs.
  - b) Algorithms coordinate teams; efficient teams command a premium.
  - c) Online labour networks supplement highly efficient employees.
  - d) Flat organizational structures supported by coordination software replace traditional hierarchy.
- Technologies only available to large organizations now empower employees to splinter off and create single-person companies and ventures
  - a) Coordination costs drop significantly.
  - b) Capital for businesses from crowdfunding, banks, and VCs flows freely.
  - c) Highly entrepreneurial flexible firms and mind-sets proliferate.
  - d) Power balance shifts from large organizations to individuals. (Gorbis, Goldman, Thigpen, 2014)

Institute chose the six drivers that emerged from its research as the most important and relevant to future work skills: extreme longevity, rise of smart machines and systems, computational world, new media and ecology, supersaturated organizations and globally connected world. This report identifies key work skills needed in the next 10 years:

1. **Sense making:** ability to determine the deeper meaning or significance of what is being expressed.
2. **Social intelligence:** ability to connect to others in a deep and direct way, to sense and stimulate reactions and desired interactions.
3. **Novel and adaptive thinking:** proficiency at thinking and coming up with solutions and responses beyond that which is rote or rule-based.
4. **Cross-cultural competency:** ability to operate in different cultural settings.
5. **Computational thinking:** ability to translate vast amounts of data into abstract concepts and to understand data-based reasoning.
6. **New media literacy:** ability to critically assess and develop content that uses new media forms, and to leverage these media for persuasive communication.
7. **Transdisciplinarity:** literacy in and ability to understand concepts across multiple disciplines
8. **Design mind set:** ability to represent and develop tasks and work processes for desired outcomes.
9. **Cognitive load management:** ability to discriminate and filter information for importance, and to understand how to maximize cognitive functioning using a variety of tools and techniques.
10. **Virtual collaboration:** ability to work productively, drive engagement, and demonstrate presence as a member of a virtual team. (Davies, Fidler, Gorbis, 2011)

One big change in the 21st century, across the media ecology and computer software, programs and internet, is that digital technologies widely shape a way of communication and information sharing, such as Facebook and Twitter. Weng (2015) present the eight skills from three main angles that include: a) views from technological world; b) the function of brain; c) the stance from multicultural society. Each angle contains the relevant skills for the future. First, from the technological world's perspective, skills include computational thinking and new-media literacy. Second, the function of brain refers to the skill of sense-making, the ability of owning three intelligences (social intelligence, emotional intelligence, cultural intelligence), the skill of design mind set, novel and adaptive thinking skill, management of cognitive load skill, multicultural society requires a cross-cultural competence.

Young people clearly see the growth opportunities in the green economy and also its expansion potential over the next 20 years – they want to work in these exciting areas but feel under skilled to do so. Specific skills identified for Europe’s green economy include: knowledge of sustainable materials, relevant traditional skills, ‘carbon foot printing’ skills, environmental impact assessment skills, and good understanding of the ‘sound’ sciences. Generic skills needed include ‘softer’ skills in leadership, entrepreneurship and risk analysis. The ability to recognise, adapt and transfer skill sets, systems analysis and a holistic approach are also valued. In environment related sectors, the following future skills have been identified: for carbon capture and storage, building and cement technologies, the wind power industry, climate change research and forecasting, agriculture, electricity, rail sector, waste treatment and recovery/recycling

## CONCLUSION

The education system could do more to assist the transition from education to the world of work. Preparing youth for the labour market is one of the key functions of the education system. Combating youth unemployment is one of the most important and most urgent challenges that states face in every continent of the globe. We are all responsible for carrying on the measures that we have adopted and purposefully reinforcing and extending them.

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## INNOVATIVE LABOUR POTENTIAL OF THE THIRD AGE INDIVIDUALS

GAGARINSKII Aleksandr, KUZNETCOVA Irina, GAGARINSKAIA Galina, GORBUNOVA Yulia

### ABSTRACT

*Despite the variety of approaches to human resource management, special studies on innovations in the field of socio-labor relations are virtually absent. There is an urgent need to focus on the methods and tools for changes in the special part of socio-labor relations, i.e., management of labor resources of older persons whose contribution to the structure of the Russian population steadily grows.*

*Urgency and cross-discipline character of the task to analyze the mechanisms for managing the labor resources of older people, combined with insufficient development of methods and tools for changes in socio-economic policy in the domestic literature determine the topic, purpose, objectives, object, and subject of the study.*

### KEYWORDS

*labor potential, third age, innovation, socio-labor relations, learning, human resource management, population, aging*

### INTRODUCTION

The purpose of the study is to develop a conceptual provisions regarding the role of socio-labor innovations in labor economics, and practical recommendations on how, using them as a basis, to improve the management of labor resources of the elderly.

Labor potential as that of both individual employee and any set of workers used in production is a quite dynamic value constantly changing not only quantitatively but also qualitatively due to the influence of a mix of socio-economic, scientific-technical, psycho-physiological, and many other factors. That is why the assessment of the level and extent of the use of

human labor potential is considered now one of the most complex and inadequately developed production problems. As the study by the Russian scientists shows, socio-economic and information technology groups of factors should be regarded as the main reasons why the scientific solution of the problem was delayed by many years.

In conditions of significant instability and uncertainty, limited resources,

the maintenance and development of labor potential is possible only if the modern management concepts and the basic provisions of the theory of human resource management are used.

### DATA ANALYSIS

Monitoring the status of the labor resources has shown that the most unfavorable situation is for workers older than 50 years who demonstrate not only a declined labor use intensity at the macro level, but also the reduced intensity labor resource development.

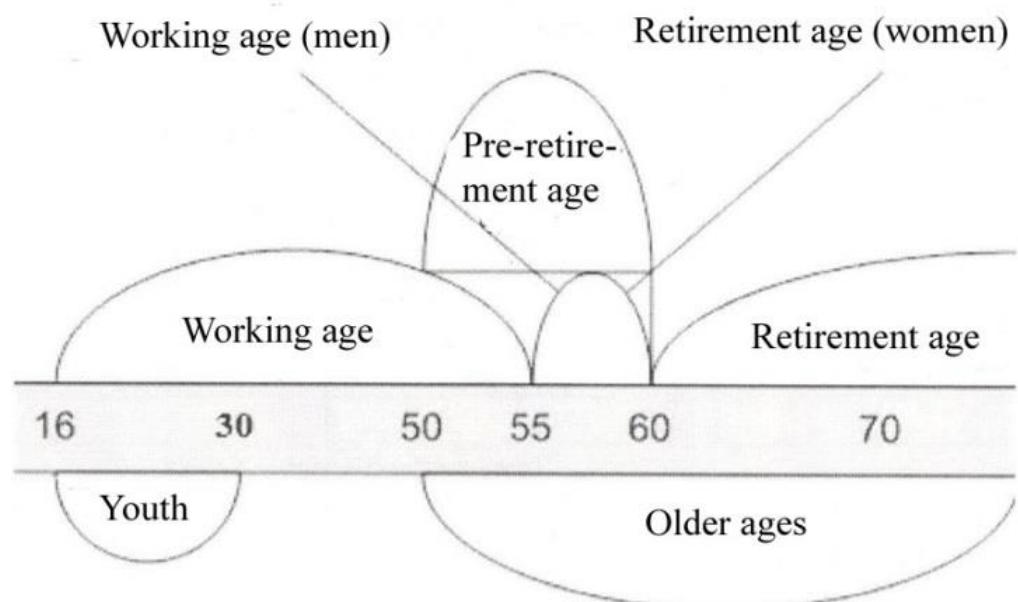
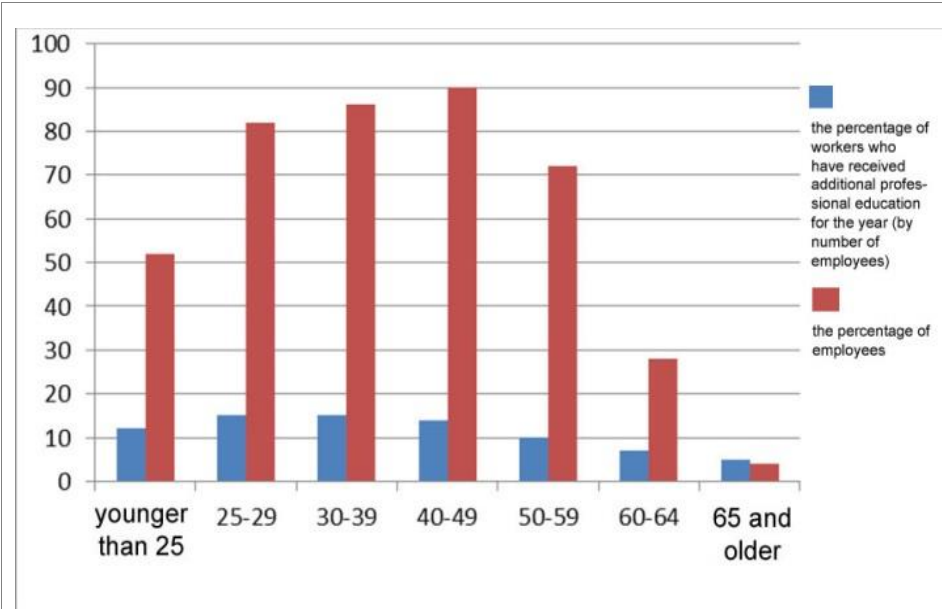
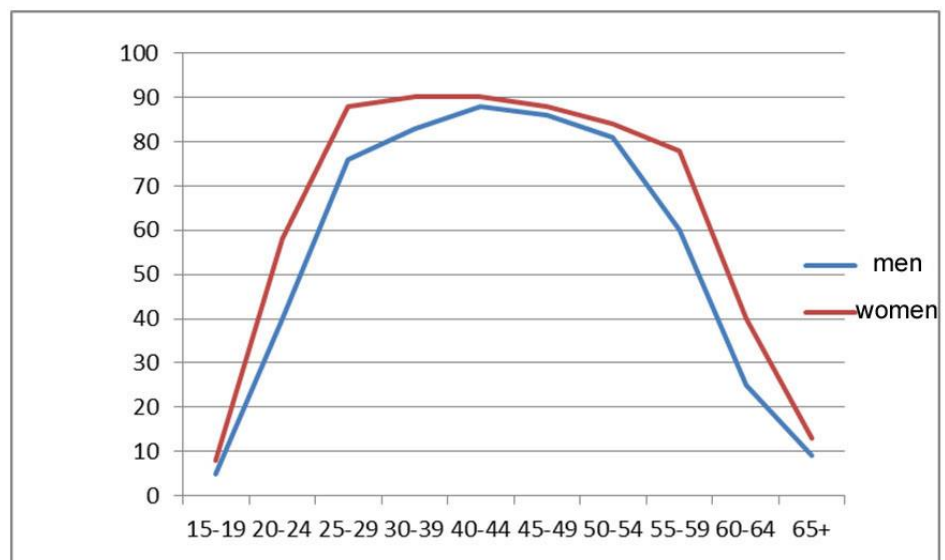


Fig 1. Proportion of larger age groups



**Fig. 2.** Use and development of labor recourses of different ages in 2013 (data from the Russian Federal State Statistics Service - Rosstat)

The effect of the retirement age only increases, but does not define the negative trend for drop-out of the labor resources from the national economy, a trend that begins yet in the pre-retirement age



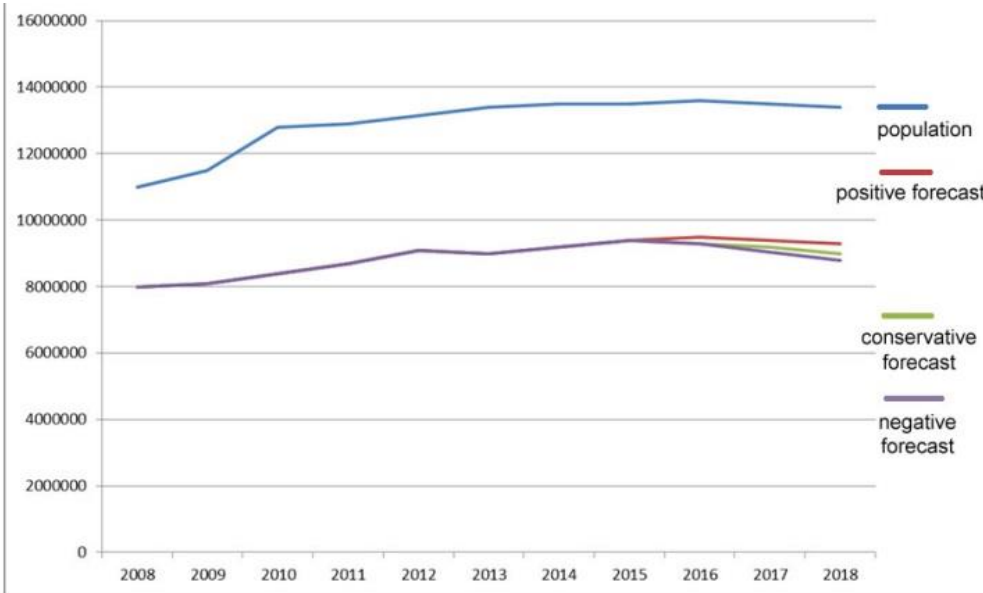
**Fig. 3.** Employment of different gender and age groups in 2013 (data from the Russian Federal State Statistics Service - Rosstat)

Despite the employment level downturn, the older age group of employees is becoming increasingly important for the national economy:

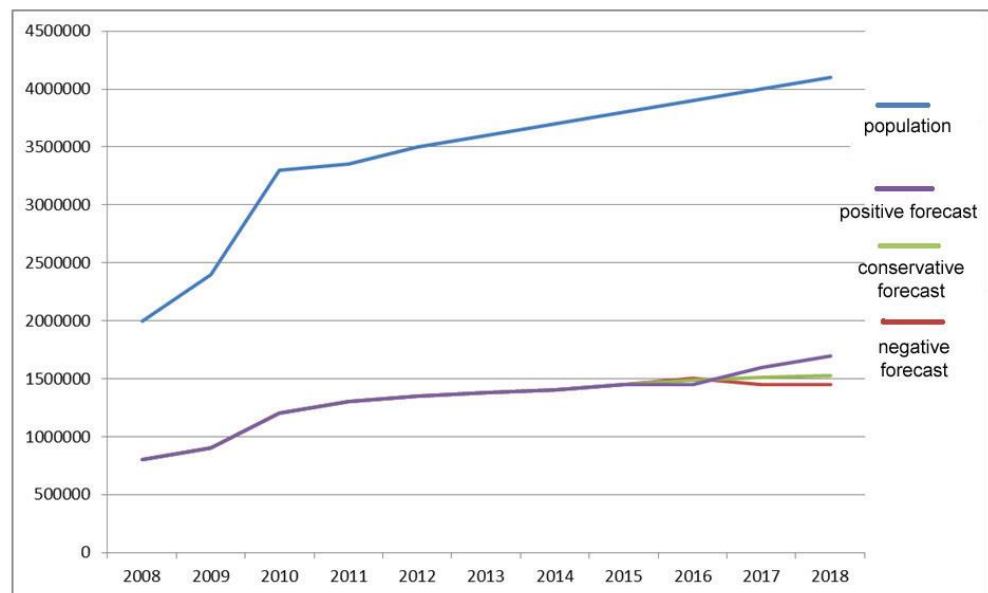
- ratio of the working age population to the pensioners changes towards increased demographic burden;
- information support of the labor market which influences the companies' access to information about the properties of human resources and the assessment of the risks

arising from information asymmetry in the labor market;

- labor market institutions acting as intermediaries in employment and contributing to the diffusion of advanced social mechanisms, etc



**Fig. 4.** Forecast of status of the older age labor resources in Russia in different scenarios for stimulating socio-labor innovations (calculated by the author using the data from the Russian Federal State Statistics Service - Rosstat)



**Fig. 5.** Forecast of status of the retirement age labor resources in Russia in different scenarios for stimulating socio-labor innovations (calculated by the author using the data from the Russian Federal State Statistics Service - Rosstat)

### INNOVATION MECHANISMS IN HUMAN RESOURCE MANAGEMENT

Becoming more complicated, and probabilistic nature of the current economic environment requires to consider the socio-labor problems in dynamics, and study the innovation mechanisms in human resource management. Crisis in the domestic economy is exacerbated by a significantly reduced population growth in the last two decades which has led to aging of the labor force (by 3% over the past 10 years, despite the small generation just entering working age).

Aging of the population combines with low life expectancy and objectively occurred lack of education and health care, exhaustion of the migration potential of neighboring countries that limits the possibility of attracting labor resources into the Russian economy. Lasting for decades the pension reform, with all its contradictions and regularly revised previously accepted norms, causes continuous changes in the labor market thus only complicating regulation and emphasizing the specific situation of the older workers. Particular importance is vested to the mechanisms that create the conditions for employment of this age group to

ensure their participation in the expanded reproduction.

There is a need to improve the methods and tools for human resource management taking into account age specifics of this category of workers, including the conceptual apparatus of labor economics as applied to the search for new mechanisms to solve

socio-labor problems and the evaluation of the results of innovation in the socio-labor sphere.

These circumstances emphasize the need to form and improve the human resource management mechanisms by means of innovations in the socio-labor sphere - the issue chosen by the author for this study

Mechanism's structure forming component	Characteristic for the third age labor resource management mechanism
Purposes (social issues to be solved)	Providing livelihood; education and training for individuals of the third age
Subjects	Learning centre (institutions of the Third Age), workers, employers, state, unions (subjects of the labor market)
Objects	Wages, taxes and fees
Prerequisites	Professional competitiveness and work motivation of the third age individuals
Implementation methods and their targets	Recruitment and selection, training
Alternatives	Pension benefits, self-employment and rentiers, multigenerational family

Fig. 6. Characteristics of the socio-labor mechanism of the third age labor potential management

Labor resource management aspect	Labor resource creation	Subject	Result	Employee	Recruitment	Employer	External recruitment	State	Employment
			Evaluation technique		$\Delta$ (change of) unemployment		$\Delta$ personnel turnover		$\Delta$ employment rate
	Use of labor resources	Subject	Result	Employee	Income	Employer	Revenue	State	Taxes
			Evaluation technique		$\Delta$ wage		$\Delta$ productivity		$\Delta$ payroll tax
	Development of labor resources	Subject	Result	Employee	Benefits	Employer	Internal recruitment	State	Employment
			Evaluation technique		$\Delta$ frequency of skill improvement		$\Delta$ personnel turnover		$\Delta$ employment rate

Fig. 7. Practical result. Specifics of the third age labor potential management

Groups of factors that affect the innovation climate have been distinguished for socio-labor relations in the field of human resources management:

- legislative regulation of labor activity restricting creation of the new forms of socio-labor relations;
- tax regulation of socio-labor relations that defines commercial attractiveness of

- innovative forms of human resources management for employers;
- creating teacher training centers for training the third age people;
- establishing the "Institute of the Third Age" centers

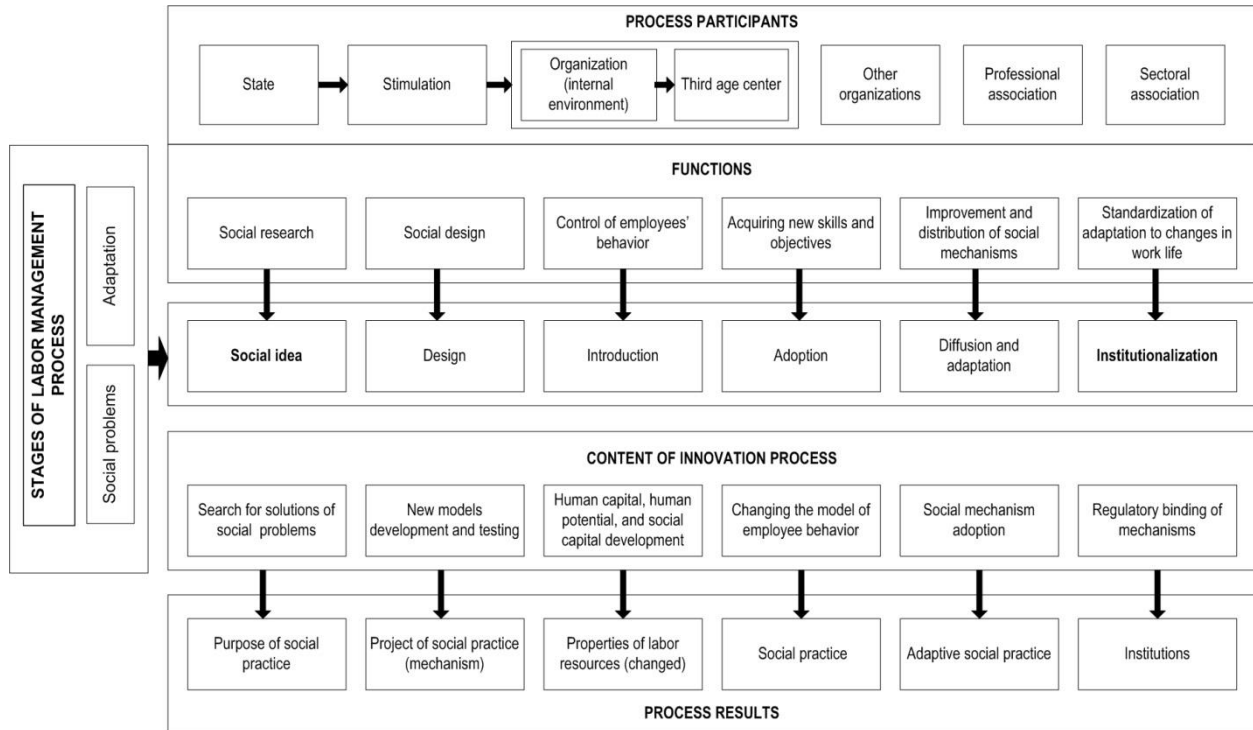


Fig. 8. Model for management of employment potential of the third age individuals

<b>Object and implementation focus</b>	Object's status	Subject	Social mechanism the innovations are introduced to	Innovative activities aimed at the mechanism
<b>Institutions: HR planning</b>	Internal environment	State	Planning of employment and unemployment	Creating the employment support system for retiring workers
		Organization	Employee's career planning	Creating the system of mentoring and consulting positions for retiring workers
<b>Human capital: recruitment and accounting for human resources</b>	External environment	Organization	Personnel selection	Introduction the services by specialized agencies for recruitment the third age individuals for part-time work
	Internal environment	State	Third age employment	Creating the state contingent labor agency for hiring the workers of pre-retirement age and third age
		Organization	Older people outplacement	Creating data base on the career preferences of retiring workers
<b>Labor potential: training and development of human resources</b>	Internal environment	Organization	Improving the skills of workers at expense of the employer	Introduction of open educational resources to improve the skills of workers during working hours
	External environment	State	Retraining of the unemployed	Creating the programs for outpaced training of employees who approach the retirement age for self-employment

Fig 9. Innovative forms of certain social mechanisms for the third age labor resource management

**CONCLUSION**

Within this model, the roles of various subjects in innovation activities, including those involved in making and executing decisions, have been clarified. The relationship between the content of the innovation process stages and the results achieved from the time of formation of a social idea to its implementation in particular social mechanism has been established. This model is proposed to serve as the basis to improve the methods and tools of development and utilization of the third age labor resources. Such ways of improvement as standardization of subject's functions and human resource management procedures, as well as breaking the results of socio-labor innovations by type, have been validated.

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**PERSONÁLNY MARKETING A BUDOVANIE IMIDŽU ZAMESTNÁVATEĽA V KONTEXTE  
UDRŽATEĽNÉHO ROZVOJA**  
**PERSONAL MARKETING AND BUILDING EMPLOYER BRANDING IN THE CONTEXT OF  
SUSTAINABLE DEVELOPMENT**

JURÍK Lukáš, VAŇOVÁ Jaromíra, SAKÁL Peter

**ABSTRAKT**

*V príspevku sa zaoberáme budovaním značky zamestnávateľa v kontexte udržateľného rozvoja. Podniky, ktoré pochopili, že ľudia sú tým najcennejším pre chod a úspech podniku, považujú svojich zamestnancov za rovnocenných partnerov. Ak podniky a ich manažment budú vytvárať pozitívne podmienky na pracovisku, budú ich zamestnanci šťastní, spokojní a budú dosahovať požadované výsledky. V príspevku sú uvedené čiastočné výsledky z dotazníkového prieskumu „Udržateľné spoločensky zodpovedné podnikanie č.7“ realizovaného na Ústave priemyselného inžinierstva a manažmentu MTF STU v Trnave. Na záver je poukázané na rozkol medzi teóriou a praxou vo vzťahu zamestnávateľ – zamestnanec, kde sa zamestnanci často stretávajú so šikanovaním na pracovisku a iným nevhodným správaním zo strany zamestnávateľa, manažmentu, prípadne ostatných zamestnancov.*

**KLÚČOVÉ SLOVÁ**

*Značka zamestnávateľa, personálna stratégia, manažér, udržateľný rozvoj, personálny marketing.*

**ABSTRACT**

*The contribution deals with employer branding in the context of sustainable development. Enterprises that understand that people are the most precious to the existence and success of the enterprise, its employees are considered equal partners. If enterprises and their management will create positive conditions in the workplace, their employees are happy, satisfied and they will achieve the desired results. The contribution presents partial results of the questionnaire survey "Sustainable corporate social responsibility No.7" realised at the Institute of Industrial Engineering and Management MTF STU in Trnava. In conclusion the authors draw attention to the contradiction between theory and practice in relation employer - employee, where employees are often faced with bullying in the workplace and other inappropriate behaviour on the part of the employer, managers or other employees.*

**KEYWORDS**

*Employer Branding, Human Resource Strategy, Sustainable Development, Personal Marketing*

**ÚVOD**

Dôležitým faktorom zabezpečujúcim chod podniku sú ľudské zdroje – zamestnanci. Ako uvádza Minárik (2012) ľudský faktor sa stáva rozlišujúcim faktorom a podniky, ktoré majú k dispozícii jeho vysokú kvalitu, si ho musia chrániť, pretože tvorí bázu konkurenčnej výhody založenej na ľudskej kreativite, myslení, ume a vedomostiach. Výhody, ktoré kedysi predstavovali nízke mzdy a lacné prírodné zdroje, sa nahrádzajú schopnosťou inovovať. Ľudské zdroje sú tvorivým prvkom v každej organizácii. Ľudia navrhujú a vyrábajú, poskytujú služby, kontrolujú kvalitu, starajú sa o uplatňovanie produktov na trhu, rozdeľujú finančné zdroje a stanovujú celkovú stratégiu a ciele organizácie. Podnik nemá šancu dosiahnuť tieto ciele bez efektívne pracujúcich ľudí. O ľudských zdrojoch sa často uvažuje len v rovine nákladov. Existuje tendencia spomínať ich prínos pre podniky, čo významným spôsobom ovplyvňuje oblasť ich riadenia (Armstrong, 2007).

Podľa Steadovcov (2012) budú počas nasledujúcich 20 rokov najdôležitejším zdrojom podnikov talentovaní zamestnanci, ktorí sú múdri, technologicky zdatní, globálne rozhladení a nadšení

pre prácu. Ďalej uvádzajú, že boj o nadaných zamestnancov sa dramaticky zosilňuje, a došli k záveru, že prilákanie a udržanie si talentu je obchodnou nevyhnutnosťou ekonomického prežitia. Ukázalo sa, že podniky s progresívnymi politikami a stratégiami ľudských zdrojov, založenými na inšpiratívnej predstave ako udržateľnosť, majú v boji o prilákanie a udržanie vysokokvalitných zamestnancov konkurenčnú výhodu. Personálna stratégia predstavuje prístup k riešeniu dlhodobých cieľov v oblasti ľudských zdrojov podniku. Ide o ciele v potrebách a zdrojov ich krytia, ako aj o stanovenie ciest a metód, ktorými sa tieto ciele dajú dosiahnuť (Višňovský, 2007). Jednou z hlavných aktivít strategického riadenia ľudských zdrojov je budovanie značky zamestnávateľa (Bajžíková a kol., 2006). Podľa Koubeka (2009) sa súčasná personálna práca v podnikoch viac sústreďuje na zlepšovanie kvality pracovného života, zvyšovanie spokojnosti zamestnancov či zlepšovanie rozvoja zamestnancov. Podniky kladú dôraz na starostlivosť o zamestnancov, na zvyšovanie uspokojenia zamestnancov s vykonávanou prácou, na zlepšovanie vzťahov medzi zamestnancom a zamestnávateľom, na zlepšovanie pracovných a

medziľudských vzťahov na pracovisku a na vytváranie jasnej perspektívy personálneho a sociálneho rozvoja zamestnancov. Podľa Klimentovej (2008) pre budúcnosť podniku je nevyhnutná orientácia na vonkajší aj vnútorný trh práce prostredníctvom tvorby zamestnávateľského mena.

**K zvýšeniu pracovnej atraktivity podniku môže podľa Koubeka (2009) prispieť:**

- *Príslušná starostlivosť o pracovné podmienky.*
- *Príslušná starostlivosť o sociálne podmienky práce.*
- *Starostlivosť o sociálny rozvoj zamestnancov.*
- *Zlepšovanie medziľudských vzťahov a sociálnej klímy v podniku.*
- *Starostlivosť o personálny rozvoj zamestnancov.*
- *Starostlivosť o vzdelávanie zamestnancov.*
- *Význam podniku, jeho úspešnosť a perspektívy.*
- *Serióznosť vo vzťahu k zákazníkom a etika podnikania.*

Z predchádzajúceho vyplýva, že nestačí ponúknuť len lepšiu úroveň odmeňovania, ale je potrebné dbať na vytváranie celkového mena (povesti) podniku ako zamestnávateľa. Dobrá značka podniku je sama o sebe veľmi účinným nástrojom uľahčujúcim získavanie zamestnancov. Preto vo svete pribúdajú podniky, ktoré zámerné vytvárajú svoju dobrú značku, pokiaľ ide o vzťah k zamestnancom, realizujú dokonca prieskumy svojho imidžu a na ich základe sa v prípade potreby snažia o nápravu. Dobré meno podniku sa stáva ústredným bodom politiky získavania a stabilizácie zamestnancov (Koubek, 2009).

Úsilie o dobrú zamestnávateľskú značku a bezproblémové formovanie personálu podniku začína mať koncepčný charakter a vyúsťuje do aktivity, ktorá je označená ako personálny marketing (Koubek, 2009).

Personálny marketing ako moderná teória a prax sa sformoval v druhej polovici minulého storočia pod vplyvom prehlbujúcich sa internacionalizačných a globalizačných procesov, ktoré vo svojom prvopočiatku vyvolali extenzívny hospodársky rast globálneho rozsahu. Pre obdobie extenzívneho hospodárskeho rozvoja svetových ekonomík bola, okrem iného, charakteristická vysoká ponuka pracovných príležitostí, pracovných miest a nízka ponuka až nedostatok pracovnej sily na väčšine typov trhov práce. Táto asymetria ponuky a dopytu pracovných miest na trhoch práce vyvolala potrebu zmeniť prístup k pracovnej sile tak vo vnútro podnikovom prostredí, ako aj v externom prostredí trhu práce. Zároveň sa odrazila v potrebe aplikovať postupy a metódy v oblasti personálneho manažmentu (Szarková, 2009).

V súčasnosti je personálny marketing komplexne konštituovaná interdisciplinárna moderná teória, ktorá obsahuje a rozvíja teoretické východiská, metodologický aparát a interdisciplinárne postupy určené na tvorbu, rozvoj, optimalizovanie a udržanie

vzájomnej výmeny a obojstranne výhodných vzťahov medzi cieľovými skupinami na trhu práce z hľadiska strategických cieľov podnikov. Zároveň sa v súčasnosti personálny marketing chápe aj ako relatívne samostatná časť manažmentu a marketingu, pričom sa zdôrazňuje hlavne jeho aplikačný charakter (Szarková, 2009). Podľa Klimentovej (2008) je personálny marketing chápaný ako proces, ktorý zabezpečí v rámci personálneho plánovania podniku dlhodobé ľudské zdroje. Predstavuje rozširovanie úloh, funkcií a nástrojov marketingu do oblasti personálneho manažmentu, hlavne v snahe získania a udržania pracovnej sily podniku, ktorá sa opiera o vytváranie dobrej zamestnávateľskej značky podniku a výskum trhu práce (Koubek, 2009).

## BUDOVANIE ZNAČKY ZAMESTNÁVATEĽA V KONTEXTE UDRŽATEĽNÉHO ROZVOJA

Zamestnanci sú dôležitými nositeľmi know-how podniku, informácií a priaznivo či negatívne ovplyvňujú celkový jeho výkon. Preto by každý zamestnanec, potenciálny zamestnanec, i širšia verejnosť mali vedieť, že je konkrétny podnik dobrým a perspektívnym zamestnávateľom, a že stojí za to pre neho pracovať.

Podľa Koubeka (2009) by sa mal podnik snažiť byť:

- *vyhľadávaným zamestnávateľom (pohybuje sa na trhu práce),*
- *dobrým zamestnávateľom (dbať o svojich zamestnancov),*
- *dobrým „susedom“ (uvedomovať si svoju spoločenskú zodpovednosť).*

Pre dobré meno značky zamestnávateľa sú dôležité obe prostredia podniku, interné aj externé. Podnik si značku zamestnávateľa v internom prostredí tvorí na základe pozitívnych vzťahov so zamestnancami prostredníctvom komunikácie, starostlivosti o nich, poskytovaním benefitov a uplatňovaním hodnôt podnikovej kultúry. V externom prostredí je dôležité, aby značka zamestnávateľa vyvíjala aktivity k dosiahnutiu dôvery u potenciálnych uchádzačov o zamestnanie a tiež u študentov stredných či vysokých škôl. Imidž značky zamestnávateľa môže nadobúdať dva protipóly – pozitívny a negatívny. Je dôležité, aby negatívny imidž značky zamestnávateľa bol eliminovaný dostupnými nástrojmi vzťahov s verejnosťou (Armstrong, 2007, Klimentová, 2008, Szarková, 2009).

Budovanie a riadenie značky zamestnávateľa je hlavným bodom koncepcie v personálnom marketingu. Táto koncepcia definuje osobnosť podniku ako preferovaného zamestnávateľa. Podľa Gertlera (2013) personálny marketing z hľadiska konkurencie a konkurenčných vzťahov priamo súvisí s koncepciou udržateľného rozvoja. Steadovci (2012) tvrdia, že jedinou cestou k prežitiu a konkurencieschopnosti podnikov je uplatňovanie princípov a kritérií udržateľného rozvoja. Teda aj

budovanie značky zamestnávateľa, prihladnuc na to, že sa týka jedného z najdôležitejších zainteresovaných subjektov, a to zamestnancov, musí byť v súlade s kritériami udržateľného rozvoja, príp. spoločenskej zodpovednosti.

Na súčasných zamestnancov je potrebné nazeráť aj ako na významný článok medzi podnikom a trhom práce, pretože sú to práve oni, kto môže verejnosti sprostredkovať informácie o správaní sa podniku a o prostredí podniku z interného pohľadu. A ak disponujú kladnými skúsenosťami, stávajú sa jej najlepšimi obhajcami (Stejskalová, 2009).

V histórii manažmentu a podnikania nájdeme viaceré pozitívne príklady sociálnej starostlivosti o zamestnancov, ktoré majú nadčasovú hodnotu. Jedným z nich je podnikateľ Tomáš Baťa, pre ktorého bolo podnikanie službou spoločnosti (Mosná, 2006). V centre pozornosti sociálnej dimenzie sa nachádza práca a pracovné záujmy zamestnancov. V kontexte prebiehajúcich zmien sú zamestnanci stále viac ovplyvňovaní pracovnými podmienkami a pracovnými vzťahmi v podniku.

Pri vytváraní podmienok práce, pri vytváraní pozitívnej pracovnej a medziľudskej atmosféry, pri komunikácii, pri sociálnej starostlivosti o zamestnancov a uplatňovaní hodnôt podnikovej kultúry dôležitú úlohu zohrávajú manažéri, ktorí si uvedomujú, že skutočným intelektuálnym bohatstvom každej spoločnosti sú zamestnanci (Andrejčák, 2013). Manažéri pri plnení týchto úloh musia disponovať určitými kompetenciami, ktoré budú vytvorené na základe kritérií udržateľného rozvoja (Jurík, 2015).

Poskytovanie sociálnych výhod nad rámec zákona okrem iného vplyva aj na imidž firmy navonok a môže sa stať konkurenčnou výhodou. Zaujímavá sociálna politika môže taktiež presvedčiť potenciálnych kandidátov, aby sa uchádzali o prácu tam, kde môžu získať „niečo navyše“ (Mosná, 2006).

Predstava udržateľnosti v podniku podnecuje túžbu zamestnancov cítiť sa ako súčasť vyššieho cieľa, čím si firma udrží talentovaných zamestnancov s víziou. Manažéri, ktorí investujú do ľudského kapitálu svojich organizácií, tak robia preto, lebo veria, že ich investícia je prostriedkom k väčšej produktivite a ziskovosti, a zároveň aj prostriedkom splnenia ich spoločenskej zodpovednosti (Steadovci, 2012)

## DOTAZNÍKOVÝ PRIESKUM „UDRŽATEĽNÉ SPOLOČENSKY ZODPOVEDNÉ PODNIKANIE Č. 7“

Dotazník „Udržateľné spoločensky zodpovedné podnikanie č. 7“ bol vytvorený dvomi doktorandmi zaoberajúcimi sa nasledovnými oblasťami, ktoré vychádzajú z problematiky USZP:

1. *Identifikačné otázky.*
2. *Udržateľná marketingová stratégia podniku (Šujaková, M.).*
3. *Kompetenčný prístup riadenia ľudských zdrojov (Jurík, L.).*

Každý z doktorandov zúčastnených na príprave dotazníka vytvoril na základe dovtedajšieho intenzívneho štúdia a s tým súvisiacich skúseností súbor relevantných otázok vzťahujúcich sa ku konkrétnej oblasti výskumu. Dotazník „Udržateľné spoločensky zodpovedné podnikanie č. 7“ bol zostavený prostredníctvom aplikácie Google Drive, kde boli jednotlivé otázky štruktúrované do troch vyššie spomenutých oblastí. Dotazníkový prieskum prebiehal od 19.11.2015 do 26.02.2016 v priemyselných podnikoch na území Slovenskej republiky. Veľkosť databázy dotazníkového dopytovania bola určená na základe veľkosti základného súboru. Za základný súbor sme, podľa údajov Štatistického úradu Slovenskej republiky k 31.10.2015, považovali 15 974 priemyselných podnikov. Výberový súbor predstavoval výskumnú vzorku o veľkosti 361 priemyselných podnikov. K 26.02.2016 vyplnilo dotazník 134 respondentov, čo súčasne reprezentuje návratnosť 37,12%. Pre účely výskumu budeme pracovať len s odpoveďami od priemyselných podnikov, ktorých sa dotazníkového prieskumu zúčastnilo 75. V príspevku sa budeme venovať len výsledkom tretej oblasti – Kompetenčný prístup riadenia ľudských zdrojov.

Pred realizáciou samotného dotazníkového prieskumu č.7 sme, podľa nami využíwanej a verifikovanej metodiky v predchádzajúcich 6-tich prieskumoch, vytvorili súbor 8 predpokladov, k nim príslušných 8 výskumných otázok, určili závislé a nezávislé premenné (tab.1). Zaradením 8 výskumných otázok medzi ostatné všeobecné otázky dotazníka sme zabezpečili vzájomné väzby medzi 8-mi predpokladmi a týmito výskumnými otázkami, na základe ktorých, po odpovedaní respondentov na dotazník, predpoklady potvrdzujeme alebo zamietame.

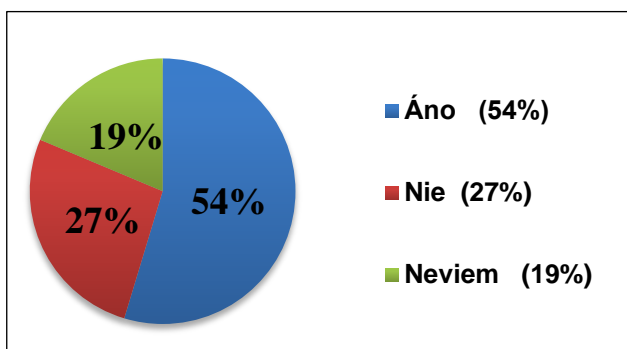
Tab. 1 Súbor predpokladov, výskumných otázok, závisle premenných a nezávisle premenných

Predpoklad	Výskumná otázka	Závisle premenná	Nezávisle premenná
P1: Väčšina priemyselných podnikov v SR nepoužíva personálnu stratégiu na podporu podnikovej stratégie.	VO č. 1: Využívate na podporu Vašej podnikovej stratégie personálnu stratégiu?	Personálna stratégia	Podniková stratégia
P2: Väčšina priemyselných podnikov v SR nerealizuje riadenie ľudských zdrojov prostredníctvom kompetenčného prístupu.	VO č. 2: Uplatňujete kompetenčný prístup riadenia ľudských zdrojov vo Vašom podniku?	Riadenie ľudských zdrojov	Kompetenčný prístup
P3 Väčšina priemyselných podnikov v SR nemá vypracovanú metodiku tvorby kompetenčných modelov zamestnancov.	VO č. 3: Máte vo Vašom podniku vypracovanú metodiku tvorby kompetenčných modelov?	Tvorba kompetenčného modelu	Metodika tvorby kompetenčného modelu
P4: Väčšina priemyselných podnikov v SR nepoužíva pri tvorbe kompetenčných modelov metódu AHP.	VO č. 4: Používate vo Vašom podniku pri tvorbe kompetenčných modelov metódu analytický hierarchický proces?	Metóda AHP	Tvorba kompetenčných modelov
P5: Väčšina priemyselných podnikov v SR nevykonáva hodnotenie stavu udržateľného rozvoja/spoločensky zodpovedného podnikania svojho podniku.	VO č. 5: Vykonávate vo Vašom podniku hodnotenie stavu udržateľného rozvoja/spoločensky zodpovedného podnikania Vášho podniku?	Hodnotenie stavu udržateľného rozvoja/spoločensky zodpovedného podnikania	Stav udržateľného rozvoja/spoločensky zodpovedného podnikania
P6: Väčšina priemyselných podnikov v SR pri tvorbe kompetenčných modelov prioritne nezohľadňuje koncepciu a kritériá UR podniku.	VO č. 6: Zohľadňujete vo Vašom podniku pri tvorbe kompetenčných modelov koncepciu a kritériá udržateľného rozvoja?	Tvorba kompetenčných modelov	Kritériá udržateľného rozvoja
P7: Väčšina priemyselných podnikov neplánuje pri tvorbe kompetenčných modelov použiť kritériá udržateľného rozvoja.	VO č. 7: Plánujete vo Vašom podniku použiť kritériá udržateľného rozvoja pri tvorbe kompetenčných modelov?	Plánovaná tvorba kompetenčných modelov	Kritériá udržateľného rozvoja
P8: Vo väčšine priemyselných podnikov v SR súčasné kompetencie zamestnancov neprispievajú k udržateľnému rozvoju podniku.	VO č. 8: Myslíte si, že kompetencie z Vašich kompetenčných modelov prispievajú k udržateľnému rozvoju Vášho podniku?	Udržateľný rozvoj podniku	Kompetencie zamestnancov

K niektorým predpokladom a výskumným otázkam boli priradené doplňujúce otázky. Pre účely príspevku sú vybrané otázky v nasledujúcej kapitole.

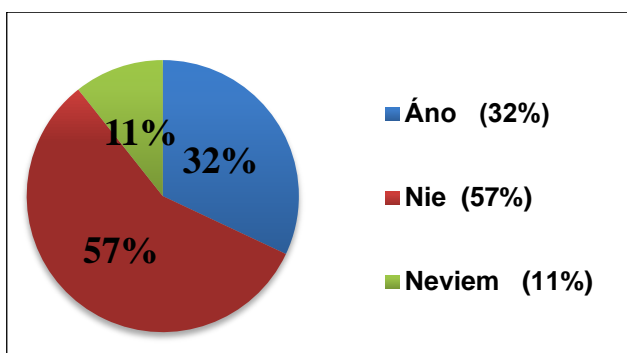
### ZÁVERY Z DOTAZNÍKOVÉHO PRIESKUMU UDRŽATEĽNÉ SPOLOČENSKY ZODPOVEDNÉ PODNIKANIE Č. 7

Na otázku „Využívate na podporu Vašej podnikovej stratégie personálnu stratégiu?“ odpovedalo 54% podnikov, že na podporu podnikovej stratégie používajú personálnu stratégiu. 27% podnikov uviedlo, že nevyužívajú personálnu stratégiu na podporu podnikovej stratégie a 19% podnikov nevedelo odpovedať na danú otázku. Predpoklad „Väčšina priemyselných podnikov v SR nepoužíva personálnu stratégiu na podporu podnikovej stratégie“ sa nepotvrdil (obr. 1).



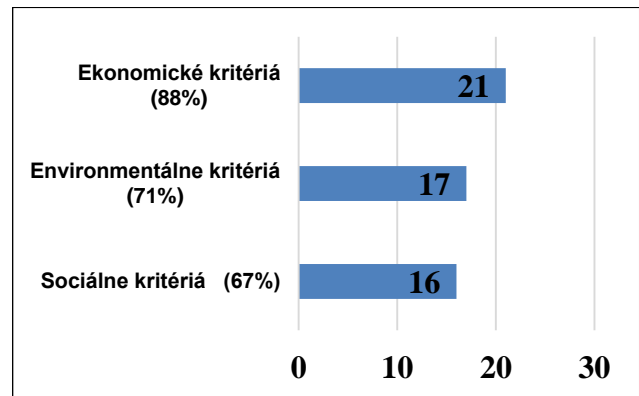
**Obr. 1** Podpora podnikovej stratégie personálnou stratégiou v priemyselných podnikoch na Slovensku (vlastné spracovanie)

32% podnikov uviedlo, že pri tvorbe kompetenčných modelov zohľadňuje koncepciu a kritériá udržateľného rozvoja. 11% respondentov nevedelo uviesť, či pri tvorbe kompetenčných modelov sa v ich podniku zohľadňujú koncepcia a kritériá UR. 57% podnikov uviedlo, že pri tvorbe kompetenčných modelov nezohľadňujú koncepciu a kritériá udržateľného rozvoja, čím sa predpoklad „Väčšina priemyselných podnikov v SR pri tvorbe kompetenčných modelov prioritne nezohľadňuje koncepciu a kritériá UR podniku“ potvrdil (obr. 2).



**Obr. 2** Zapracovanie koncepcie a kritérií udržateľného rozvoja pri tvorbe kompetenčných modelov v priemyselných podnikoch na Slovensku

Na otázku „Ktoré kritériá udržateľného rozvoja zohľadňujete vo Vašom podniku pri tvorbe kompetenčných modelov?“ odpovedalo 24 respondentov, pričom na výber mali sociálne, environmentálne a ekonomické kritériá. Najčastejšie podniky uvádzali, že pri tvorbe kompetenčných modelov zohľadňujú ekonomické kritériá (88%). Nasledujú environmentálne kritériá so 71% a sociálne kritériá zohľadňuje pri tvorbe kompetenčných modelov 67% podnikov (obr. 3).

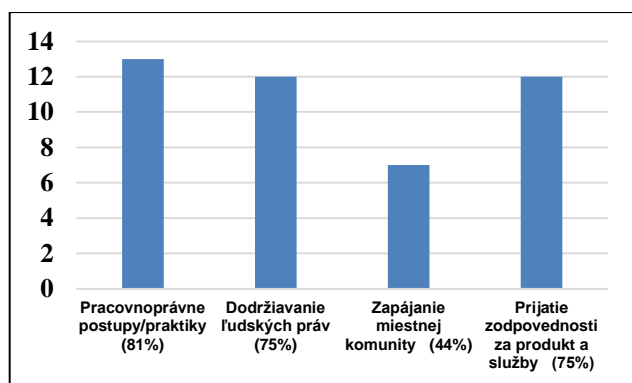


**Obr. 3** Zohľadnenie kritérií udržateľného rozvoja pri tvorbe kompetenčných modelov v priemyselných podnikoch na Slovensku

Na otázku „Ktoré sociálne kritériá udržateľného rozvoja zohľadňujete vo Vašom podniku pri tvorbe kompetenčných modelov?“ odpovedalo 16 respondentov, pričom na výber mali nasledovné možnosti:

- Pracovnoprávne postupy/praktiky a dôstojnosť ľudskej práce (napr. zamestnávanie znevýhodnených skupín obyvateľstva, poskytované benefity pre zamestnancov, informovanie zamestnancov, rovnosť príležitostí).
- Dodržiavanie ľudských práv (napr. rovnaké zaobchádzanie, kolektívne vyjednávanie).
- Zapájanie miestnej komunity (napr. protikorupčné správanie, eliminácia negatívnych dopadov na miestnu komunitu).
- Prijatie zodpovednosti za produkt a služby (napr. vplyv produktov na zdravie a bezpečnosť, udržateľný marketing).
- Iné.

Najčastejšie podniky uvádzali pracovnoprávne postupy/praktiky (81%), dodržiavanie ľudských práv (75%), prijatie zodpovednosti za produkt a služby (75%) a zapájanie miestnej komunity (44%).



**Obr. 4** Zohľadnenie sociálnych kritérií udržateľného rozvoja pri tvorbe kompetenčných modelov v priemyselných podnikoch na Slovensku

## ZHODNOTENIE AKTUÁLNEHO STAVU

Pri budovaní imidžu značky zamestnávateľa dôležitú úlohu zohráva manažér, ktorý musí disponovať kompetenciami vytvorenými na základe kritérií udržateľného rozvoja. Z pohľadu zamestnancov ide predovšetkým o sociálne kritéria, ale nemožno vynechať ani environmentálne a ekonomické kritéria. Z dotazníkového prieskumu „Udržateľné spoločensky zodpovedné podnikanie č. 7“ vyplýva, že 54% priemyselných podnikov má vytvorenú personálnu stratégiu a využívajú ju na podporu podnikovej stratégie. Stále v nej však absentujú princípy a kritéria udržateľného rozvoja, čo sa prejavuje v tom, že iba 32% priemyselných podnikov pri tvorbe kompetenčných modelov zohľadňuje kritéria udržateľného rozvoja. Pri tvorbe kompetenčného modelu, ktorý je mostom medzi personálnou stratégiou a podnikovou stratégiou, stále prevládajú tradičné ekonomické kritéria na úkor sociálnych, prípadne environmentálnych kritérií. Priemyselné podniky najmenej zohľadňujú práve sociálne kritéria pri tvorbe kompetenčných modelov. Spomedzi sociálnych kritérií udržateľného rozvoja respondenti najčastejšie označili *pracovnoprávne postupy/praktiky a dôstojnosť ľudskej práce*, kde sú zahrnuté aspekty ako zamestnávanie znevýhodnených skupín obyvateľstva, poskytované benefity pre zamestnancov, informovanie zamestnancov, rovnosť príležitostí, atď.

Bohužiaľ, na tomto mieste musíme konštatovať, že teória a prax sú dva rozdielne svety. V praxi sa zamestnanci často stretávajú s negatívnymi prejavmi správania sa na pracovisku, ako mobbing, bossing, zneužívanie zamestnancov, šikanovanie, psychoteror na pracovisku a morálne obťažovanie (Olišovská, 2013). Takéto správanie podnikov, manažérov, zamestnancov voči ostatným zamestnancom je neudržateľné nielen pre podniky, ale aj pre celú spoločnosť.

## ZÁVER

Marketingovú orientáciu podniku, resp. personálneho útvaru podniku je nevyhnutné stále rozvíjať. Úspešné uplatnenie marketingu v súčasnej praxi

riadenia ľudských zdrojov je založené na poznaní potrieb a požiadaviek existujúcich a potenciálnych zamestnancov – uchádzačov sa o ponuku pracovného miesta v podniku. Je preto veľmi dôležité budovať a udržiavať čo najlepšiu povesť podniku a využiť potrebné poznatky k osloveniu vhodných uchádzačov o prácu a udržať si kľúčových zamestnancov.

V rámci tvorby a udržania si pozitívneho imidžu zamestnávateľa v očiach zamestnancov existujúcich a potenciálnych, si musia manažmenty priemyselných podnikov uvedomiť, že úspech podniku závisí od jeho zamestnancov. Imidž podniku sa stáva veľmi dôležitým aktívom podniku. Marketingový koncept budovanie imidžu značky zamestnávateľa definuje, diferencuje a všestranne podporuje signály, ktoré podnik vysiela k svojim súčasným aj potenciálnym zamestnancom.

*Príspevok nadväzuje na výsledky projektov APVV č. LPP-0384-09: „Koncept HCS modelu 3E vs. koncept Corporate Social Responsibility (CSR).“; KE GA č. 037STU-4/2012 „Zavedenie predmetu „Udržateľné spoločensky zodpovedné podnikanie“ do študijného programu Priemyselné manažérstvo na II. stupni MTF STU Trnava.“ a VEGA č. 1/0448/13 „Transformácia ergonomického programu do štruktúry manažérstva podniku integráciou a využitím modulov QMS, EMS, HSMS.“.*

*Príspevok je súčasťou podaného projektu KE GA č. 006STU-4/2017 „Inovácia štruktúry, obsahu a spôsobu výučby predmetu „Strategický manažment“ v kontexte nového modelu podnikania pre 21. storočie založeného na stratégii „výhra-výhra“.“.*

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## FUNDAMENTALS OF INCREASING THE PRODUCTIVITY AT INDUSTRIAL ENTERPRISES

KRASULINA Sergeyevna Tatiana, GAGARINSKAIA Pavlovna Galina

### ABSTRACT:

Industrial companies face a range of the most complicated problems related to their management activities. Because of this, the issues of improving productivity become of great importance. Solving this issues would allow most full use of the available labour potential and, thus, provide opportunity to improve the socio-economic efficiency of any enterprise. The article describes methodological basics for increased staff productivity at the enterprises of the industrial complex. The authors analyzed the indicators that affect the process of increasing the labour productivity, developed a model for improving the productivity.

### KEYWORDS:

labour productivity, labour activity, personnel, fixed assets, industrial enterprises.

### INTRODUCTION

Innovative paradigm of Russian economic development calls for mastering the modern methods and management tools, aimed at identifying and efficient use of the internal potential of each enterprise while taking into account the specifics of its activities. Various enterprises face the whole range of problem components associated with their activity. In this respect, quite high importance is given to the issues related to stimulating labour activities of the personnel. Solving this issues would allow most full use of the available labour potential and, thus, provide opportunity to improve the socio-economic efficiency of the enterprise.

To understand the current status of any company, including an oil production one, it is not enough to analyze the available fixed assets, working capital, and general production volume. The effectiveness is the combination of the excess of proceeds over the total costs to receive it, that is making a profit. Therefore, in order to determine the effectiveness of the company it is necessary to analyze its financial results, which later will make it possible to reveal the negative aspects and identify the ways to address these issues.

### 1. ANALYSIS OF INDICATORS THAT INFLUENCE PRODUCTIVITY

Growth of industrial production shows the relative improvement of the market position, although this does not mean the increased competitiveness of the products. Growth of output, in most cases, is due to adaptation to the secondary market niches, use of past achievements (scientific and technological potential created in the Soviet period) without long-term investment in development.

Statistics registers steady growth of domestic production in the pre-crisis period, but, despite this, the development of the enterprises of the industrial complex, nevertheless, was characterized by contradictory trends. Today, industrial enterprises are in deep and painful crisis. The reason for this is the specific features of the enterprises, economic crises of recent years, and many other factors restraining economic growth. This has led to, and, at the same time is caused by the fact that today industrial enterprises face many serious problems. These problems are primarily related to outdated techniques and technology, poor quality products, lack of qualified personnel, lack of investment and markets, unfair competition, and many more.

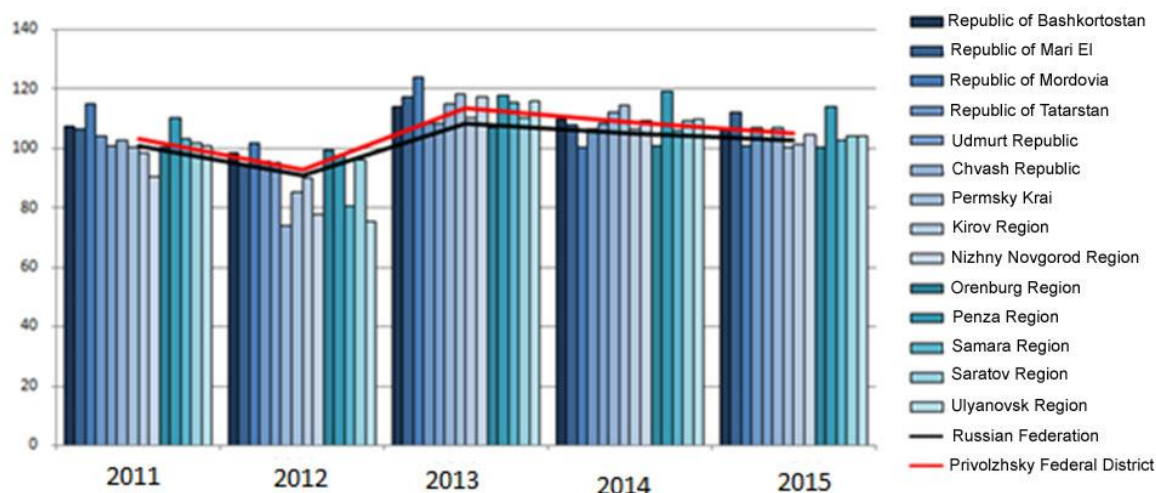


Fig.1. Analysis of labour productivity by the regions of the RF

Special attention must be paid to the differences in the development rate of the economic sectors. Currently, the extractive sector has the largest share in the industry. At the same time, the needs of society suggest it is necessary to promote greater development of manufacturing.

Main economic activities within extractive and manufacturing are the fossil fuel extraction, metallurgical production, and production of finished metal products, respectively. Production index in metallurgy is, as a rule, higher than for the fossil fuel extraction.

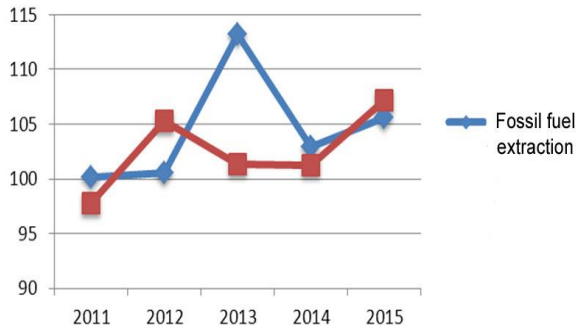


Fig. 2. Production dynamics by individual sectors in the RF

Currently industrial enterprises experience critical moral and physical deterioration of the equipment. Year by year, depreciation of fixed assets grows and there is a relatively low level of return on assets. Active part of fixed capital has been worn by 50-60 % according to official estimates, and by 70-80 percent according to unofficial estimates and is in disrepair condition. This leads to significant stagnation in labor productivity, decline of production capacity, the progressive collapse of the industry, and growing dependence on imports of high-quality equipment.

Enterprises in mineral resource extraction have more fixed assets compared with manufacturing. It should be noted that, despite the economic crisis, there is a positive trend for this indicator.

As the chart shows, share of depreciated fixed assets in 2015 increased significantly compared to previous years. The values of fully depreciated assets at the enterprises in mineral resource extraction are higher than those in the manufacturing enterprises.

## 2. MODEL FOR INCREASING THE LABOUR PRODUCTIVITY (ILP) OF PERSONNEL

In order to examine the system as a complex object that is difficult to grasp in time and space, it is necessary to examine its model. The model has the ability to reproduce the characteristics of the original system. Besides, the model is illustrative, observable, accessible, and lends itself easily to various types of tests.

Model for improvement of the personnel's labour efficiency is shown in Fig. 4. The model reflects the sequence and content of the blocks for growth of personnel's work productivity. The outer contour of labor efficiency growth is based on modern management approach to improvement of the labour activity of the personnel which is implemented through an innovative paradigm of modern economics and management. Business executives are aware of the need for progressive changes in management and look for effective ways and means to develop the production.

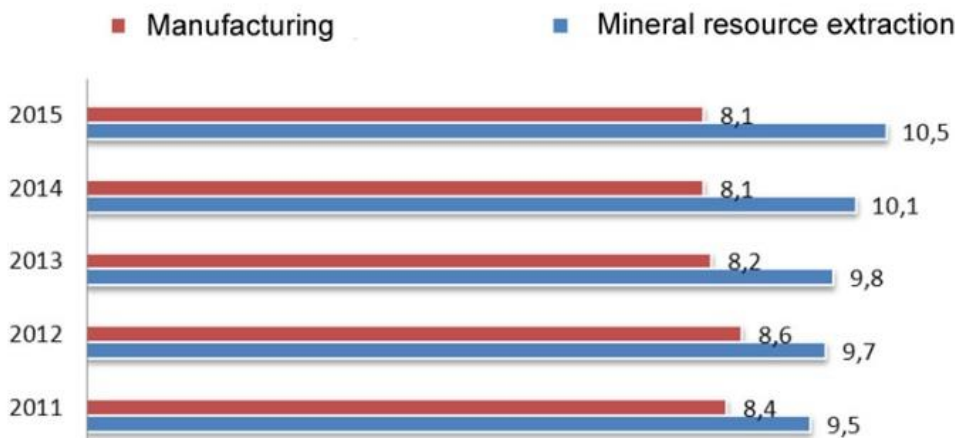
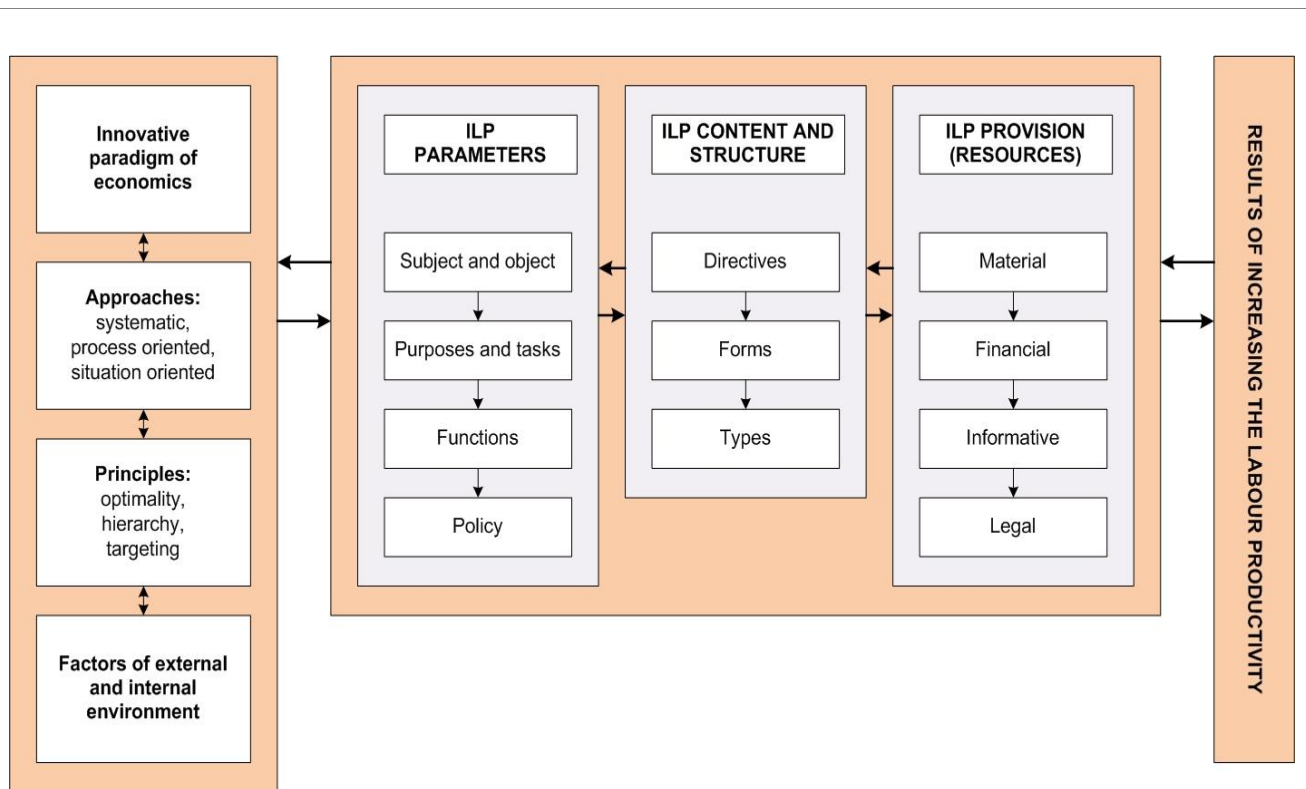


Fig. 3. Analysis of availability of fixed assets in the RF by economic activity, full book value at the year end



**Fig. 4.** Model for increasing the labour productivity (ILP) of personnel (created by the author)

Variety of approaches to management, including the systematic, process oriented, and situation oriented ones can improve the efficiency of enterprises. Principles of optimality principles, hierarchy and targeting form the internal environment of the enterprise and define a set of tasks to be accomplished to improve work productivity of personnel.

Factors of internal and external environment are the most important elements of the external contour. In our view, it is exactly the combination of factors that determines the industry-specific increase in labor productivity.

When considering the internal contour of ILP let's distinguish four blocks. The first block reveals the content of the ILP parameters, the main of which are the object and subject. The subjects of this system are "the entire organization, senior management, line and functional managers, specialists of personnel management service, teams of organization including informal groups, the workers themselves, subjects of control by the organization's external environment of the state, sector and regional level. " In this model, the personnel of organization plays

the role of the object, and the motivation of the workers of the organization is the subject.

The most important parameter of the ILP model is its aims and objectives. As shown above, ensured personnel stability, ensured inflow of new personnel, and ensured effective work and work behavior must be considered as the main objectives.

The next block of the internal contour of ILP model is the content and structure of the model.

Another block of the ILP model's internal contour is represented by certain resources. Following resources must be distinguished: material, financial, informative, and legal.

And finally, the most important block of the presented model is the results of ILP with the productivity and efficiency of the personnel being the most important to name.

Fig. 5 schematically shows the effect of work stimulation on productivity and efficiency

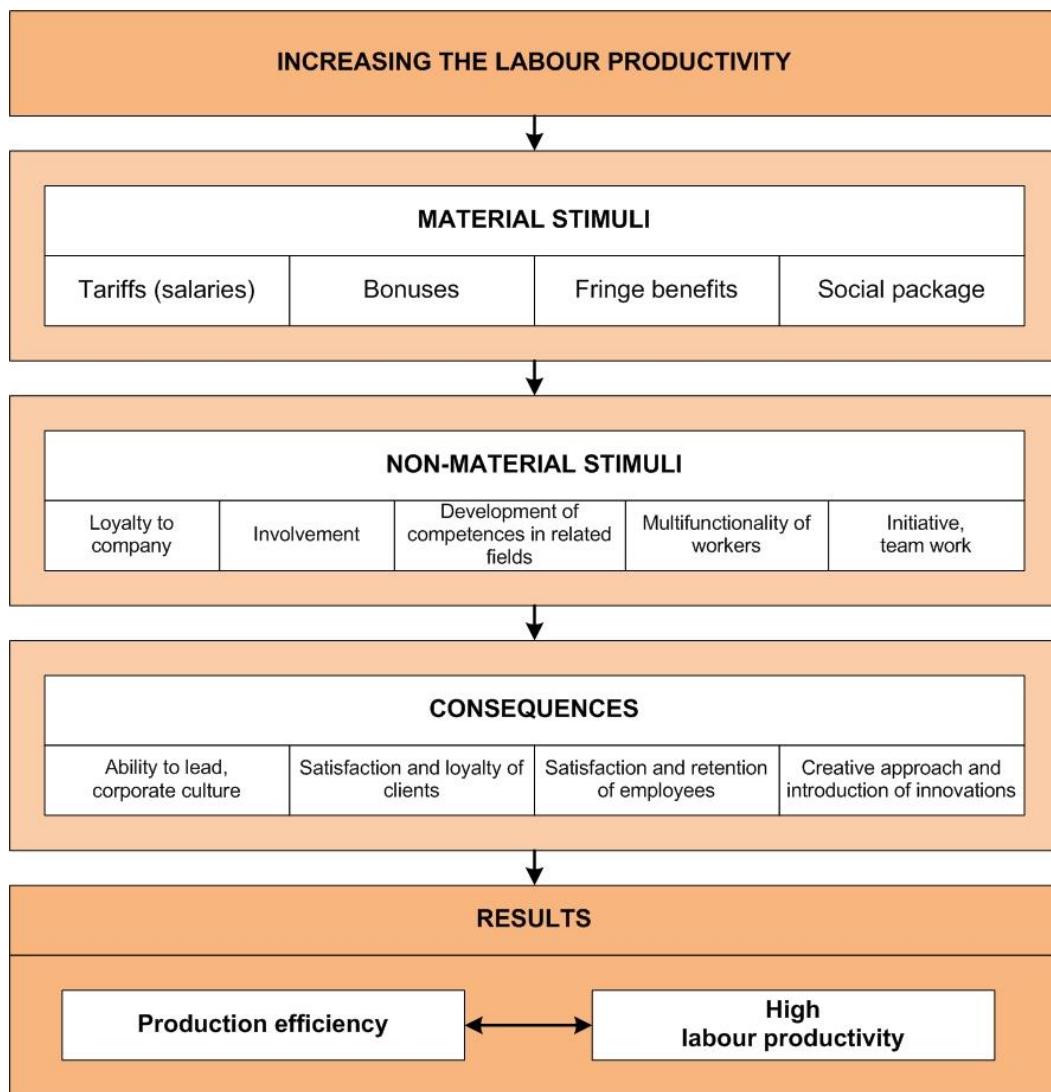


Fig. 5. Scheme of relationship scheme between the efficiency and labour productivity (created by the authors)

Developed by the authors the ILP model provides the feedback that ensures correction of changes and accumulation of positive experience in implementing reforms in the enterprise. Using the developed ILP model allows to create prerequisites in the enterprise for implementation of organizational and economic mechanism for increasing the labour productivity of the personnel.

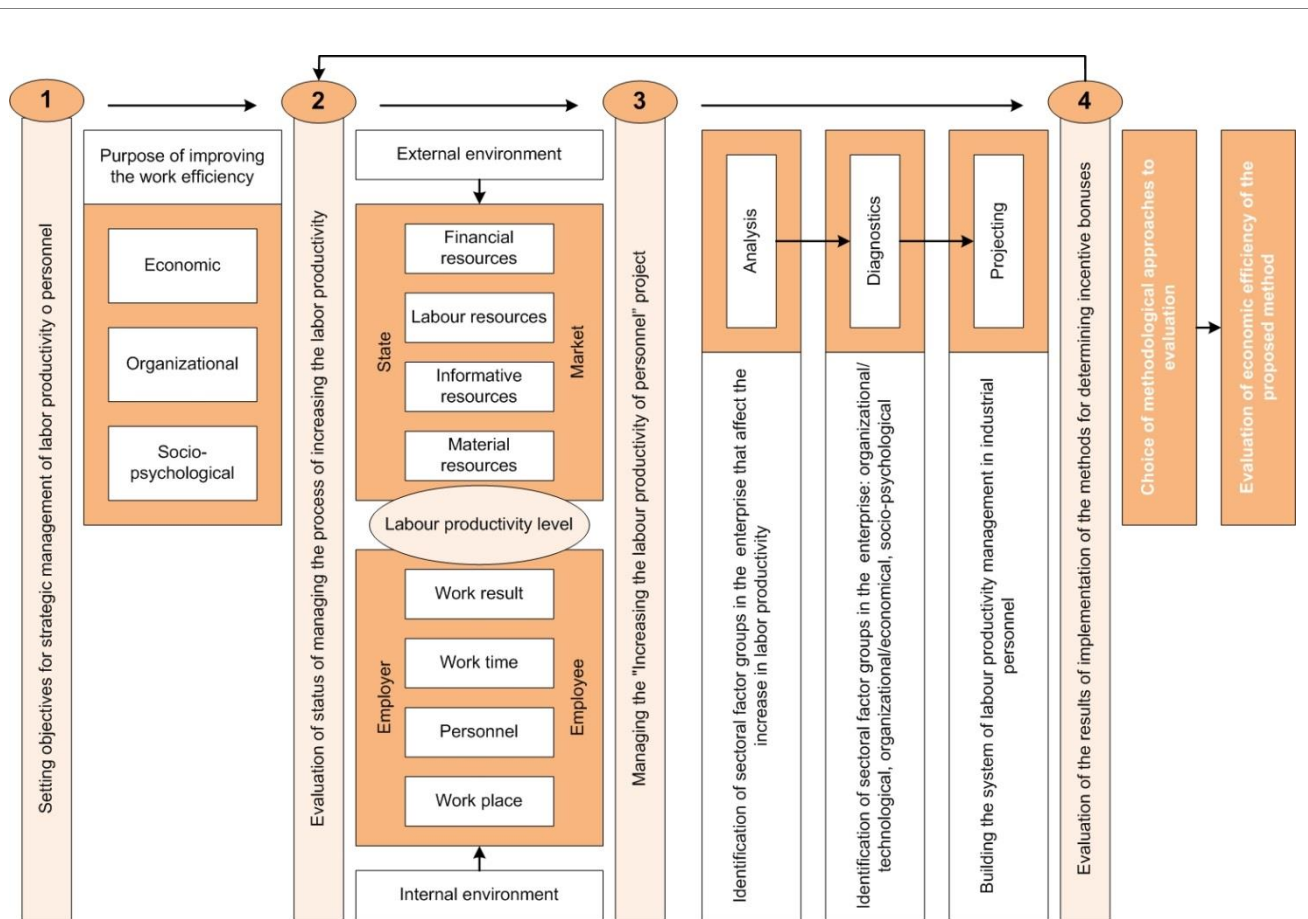
In process of solving the problems set in the study, the authors assumed that implementation of the process of improving the efficiency of work is one of the management functions in the organization. One of the manifestations of this functions is to encourage highly productive activity of the personnel.

The need for labour productivity management of the enterprise personnel is more objectively reflected in the country's economic development strategy, aimed at production of specific goods and services rather than extraction of fuel and energy resources. With this in mind, managing the labour productivity of the personnel is represented as an algorithm of actions

aimed at formation and improvement of the organizational and economic mechanism (see Fig. 6), oriented to the results of economic activities of enterprises, that is, improving the personnel's work efficiency, profit maximization, and higher profitability.

To study the possibility of using the proposed ILP model in the enterprises it is necessary, first of all, to identify the factors that influence the motivation of the enterprise personnel, evaluate them, and, based on this, form a set of guidelines to improve the personnel work efficiency in the sector.

Thus, the management of the ILP process should become one of the main goals of the enterprise management system, providing also higher individual and collective productivity to achieve economic objectives and results of the company and the needs of society.



**Fig. 6.** Algorithm for managing the process of increasing the work efficiency of the personnel (created by the authors)

### 3. MECHANISM FOR INCREASING THE LABOUR PRODUCTIVITY AT THE ENTERPRISE

The authors proposed a mechanism to determine the integrated efficiency of the increased work activity of the personnel, which increases the objectivity of the indicator calculation based on the company's results. In addition, visual interpretation of the integral index of the personnel's work performance has been proposed.

Integrated efficiency of the increased work activity for enterprises can be calculated using the formula:

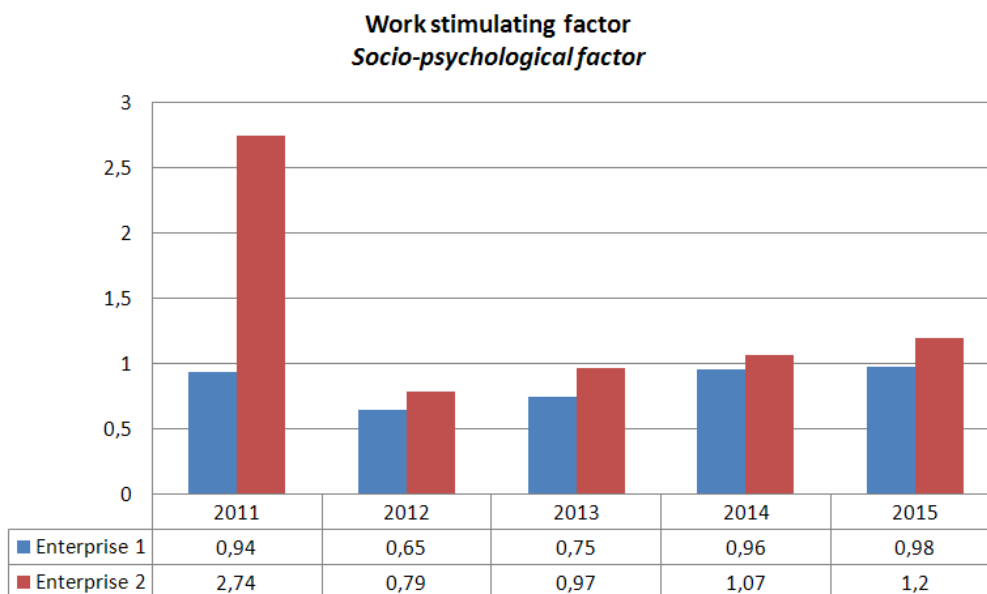
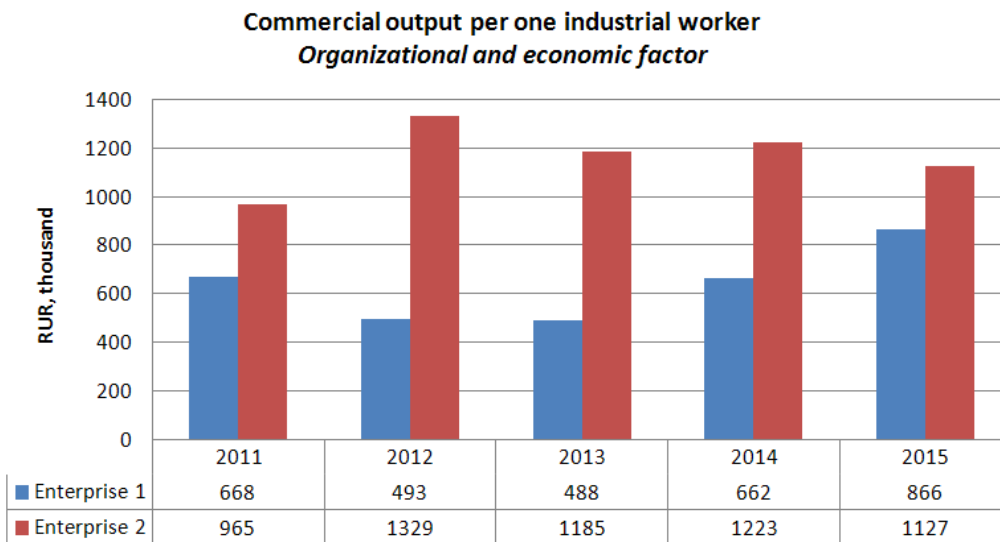
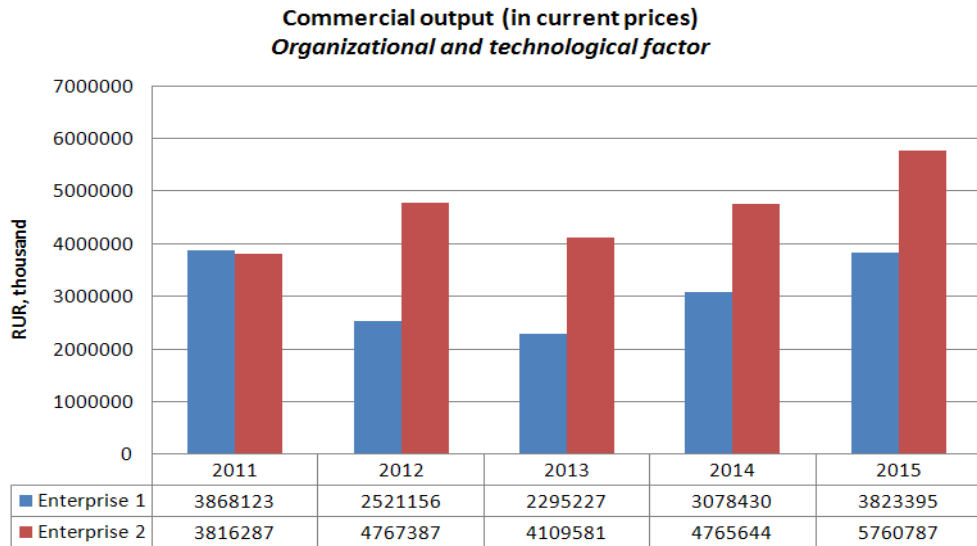
$$P = H_T^{0,474} * H_E^{0,978} * H_S^{0,673}, \quad (1)$$

where

$H_E$  — efficiency of the increased work productivity due to organizational and economic factors;

$H_T$  — efficiency of the increased work productivity due to organizational and technological factors;

$H_S$  — efficiency of the increased work productivity due to socio-psychological factors



**Fig 7.** Indicator groups for evaluation the influence of factors on efficiency of the increased work productivity of the enterprise personnel

Thus, the algorithm for determining the weight coefficients in integrated efficiency of the increased work productivity is as follows:

1. Group the enterprises having the same conditions of external environment.
2. Find indicators for each group of internal environment factors (organizational/technological, organizational/economic, socio-psychological) for each enterprise in selection
3.  $P_{i,j}, j = 1, \dots, N_{ent}; i = 1, \dots, N'$ .
4. Find indicators of integrated efficiency of the increased work productivity of the personnel  $\{O_i, i = 1, \dots, N_{ent}. C_i, i = 1, \dots, N_{ent}\}$ .
5. Find the weight coefficients based on the total number of equations equal to the number of groups of internal environment factors.
6. Check the result for the control group of companies.

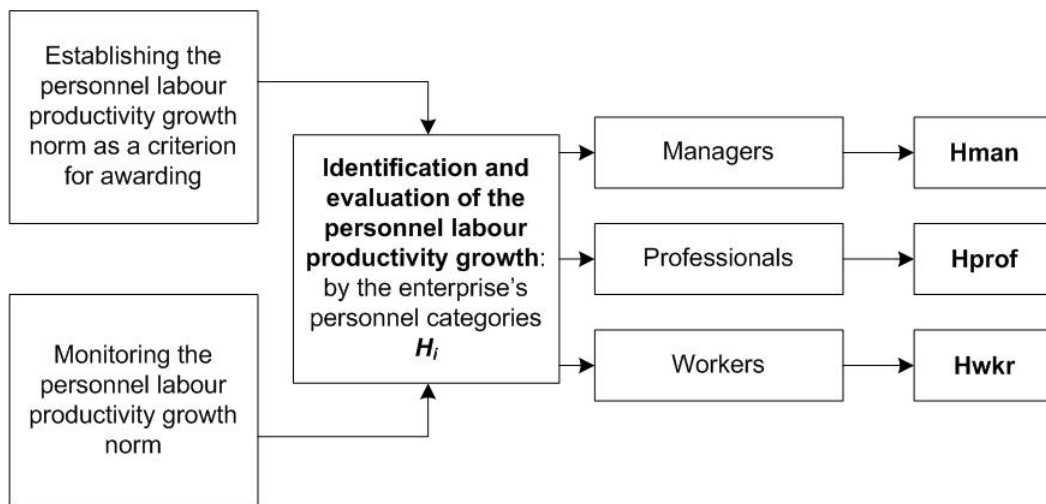
The value of the weight coefficients is the degree of significance of different groups of internal environment factors. This information is the basis for

making important management decisions by company management including calculation of incentive payments to the employees for good results.

Inclusion of the integral index of efficiency of the increased work productivity as a kind of norm allows to take into account the impact of organizational and technological ( $H_T$ ), organizational and economic ( $H_E$ ), and socio-psychological ( $H_S$ ) factors on increasing the labor productivity for each category of personnel

### CONCLUSION

Inclusion of the integral index of efficiency of the increased work productivity as a kind of norm allows to take into account the impact of organizational and technological ( $H_T$ ), organizational and economic ( $H_E$ ), and socio-psychological ( $H_S$ ) factors on increasing the labor productivity for each category of personnel (see. Fig. 8).



$$\text{Increment based on the labour productivity growth norm} = \text{Basic wage} + \text{Basic bonus (\%)} \times H_i/100$$

**Basic wage** - wage used as the basis for calculating the individual remuneration (base salary of the employee, average salary for the year, total annual salary);

**Basic bonus (%)** - percentage of bonus differentiated for each level of the job hierarchy of employees.

*Fig. 8. Methods for finding the size of the incentive contributing to increased labour productivity of the enterprise personnel*

Managers - incentive is calculated taking into account the impact of efficiency of the increased work productivity of the personnel in the sector using:

- Organizational/technological ( $H_T$ ) factors;
- Organizational/economic ( $H_E$ ) factors;

- Socio-psychological ( $H_S$ ), factors.

Professionals - incentive is calculated taking into account the impact of efficiency of the increased work productivity of the personnel in the sector using:

- Organizational/economic (HE) factors;
- Socio-psychological (HS), factors.
- Workers - incentive is calculated taking into account the impact of efficiency of the increased work productivity of the personnel in the sector using:
- Socio-psychological (H<sub>s</sub>), factors.

The problem of development of domestic enterprises along the innovative and strategic direction is related to the complex task to increase labour productivity of the personnel. It is necessary to improve personnel management methods and methods for stimulating work activities of the employees inherent to modern management and that are actively used abroad for the effective management and higher productivity. Solution to this urgent problem was addressed by the present study whose main objective is theoretical substantiation and development of methodical and practical recommendations in increasing the labour productivity in the enterprises

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## MANAGING MAINTENANCE SERVICES IN AGRICULTURE IN EASTERN HUNGARY

OLÁH Béla

### ABSTRACT

Maintenance is gaining more and more importance nowadays; in spite of this fact it is regrettable that sufficient information is hardly available on the state of the domestic maintenance services particularly in agriculture. The author carried out the survey by means of a questionnaire within the sphere of the small- and medium-scale agricultural companies operating in the eastern region of Hungary. The scientific research gives an account of this survey and the experiences of its evaluation, especially of the utilization and supply of the maintenance services in the field of machine repair and diagnosis, as well as compares these assessments with results of earlier projects carried out by colleagues of the Department of Maintenance at the Agricultural College Faculty of Tessedik Sámuel College in Mezőtúr [2, 10, 11, 12].

### KEYWORDS

maintenance, services, agriculture, small- and medium-scale companies, regional survey

### INTRODUCTION

The failures of machines and other equipment cannot be totally eliminated by the application of modern, preventive maintenance strategies and methods, either. There are errors and off-times. These often cause great losses [10]. The standard of maintenance by means of the available instruments has an influence on the use of energy and materials of production, on the quality of products, on the trend

of rejects, and on the quality of waste among other things [1]. It is not by accident that the importance of maintenance is growing. The technical-economic development also requires the improvement of maintenance services [9].

Maintenance is part of the service life of machines (Fig. 1) from the investment up to sorting out [8].

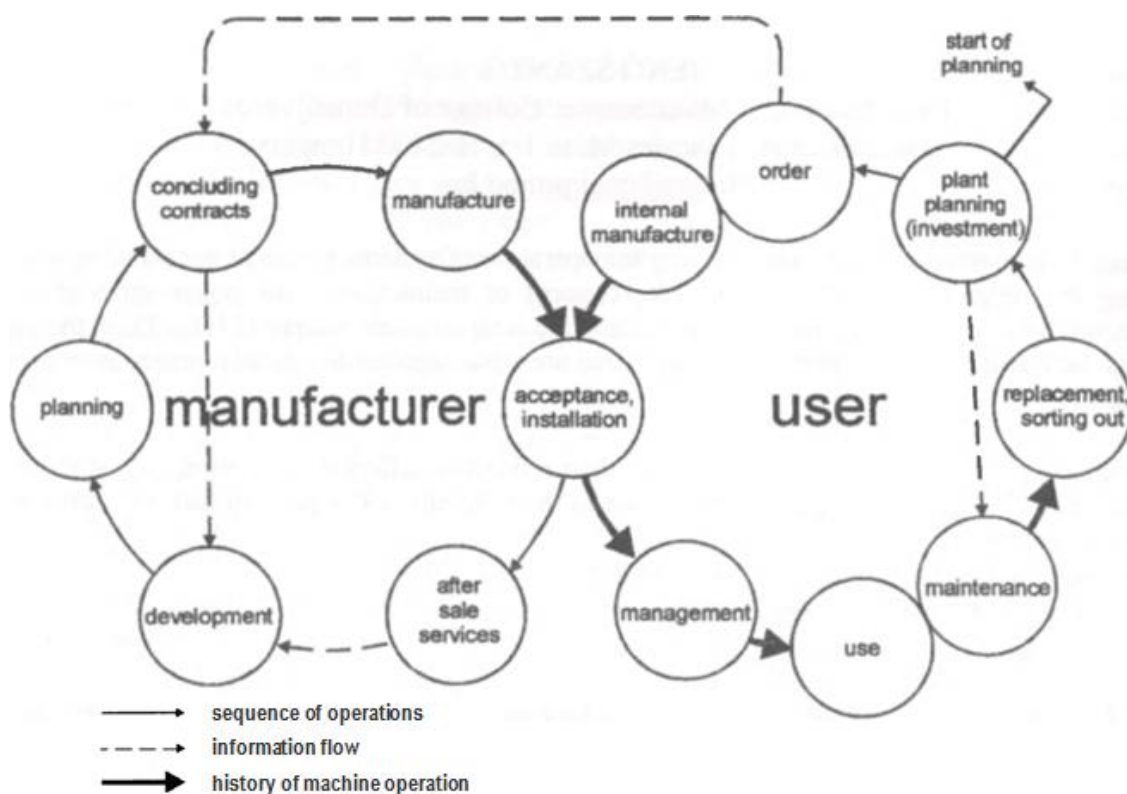
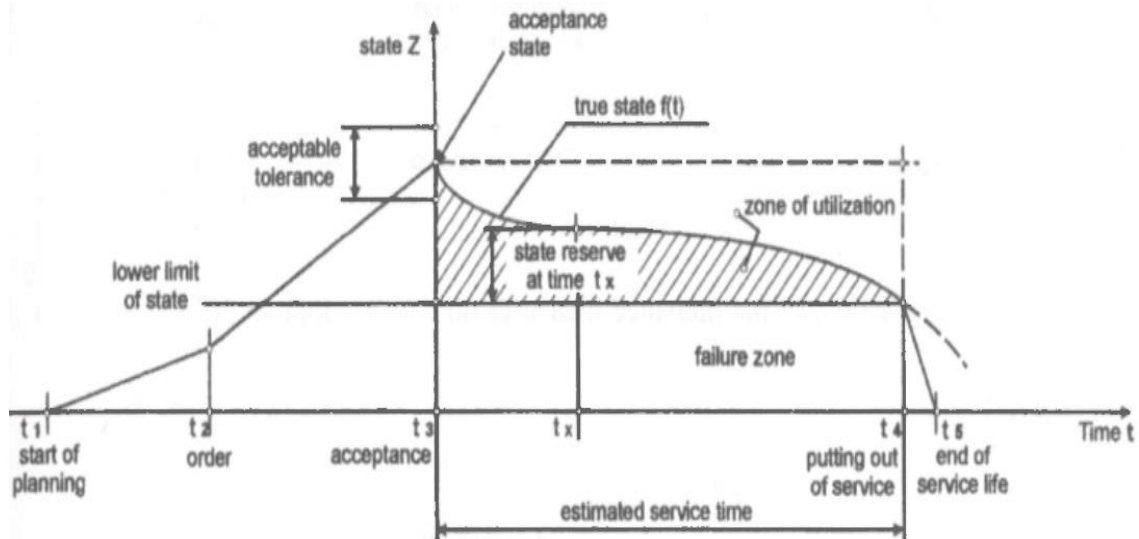


Figure 1 Dual-circuit model of the service life of machines [7]

The maintenance covers the entirety of measures aimed at preserving and restoring functionality as well as evaluating the actual state. The precondition of functional ability is that the machine is provided with reserve – the so-called wear and tear reserve – necessary for fulfilling its function. The changes in

this reserve are shown in Figure 2 from the start of planning up to the time of putting out of service [7].



**Figure 2** Changes in the state of the machine during its life history [3]

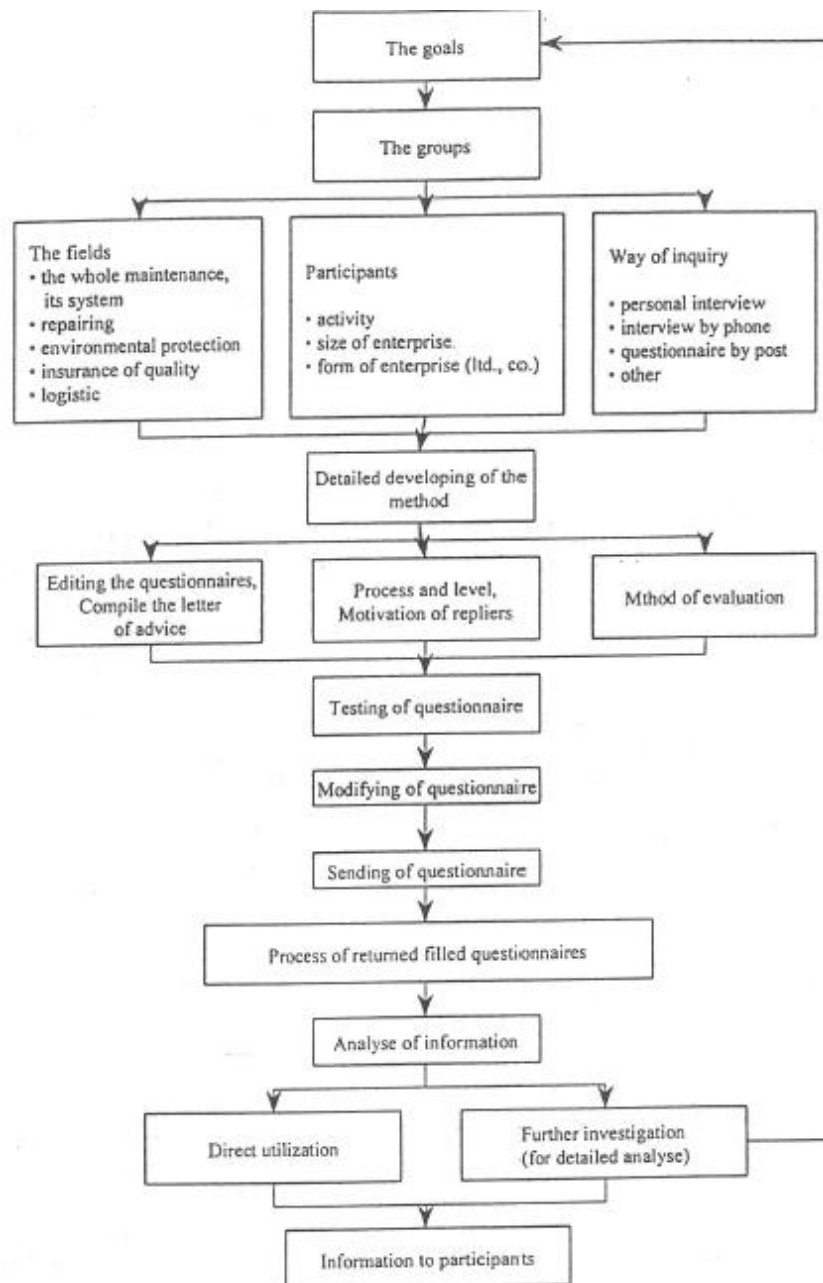
Maintenance is fundamentally a service activity carried out with internal (own) resources or external (foreign) organisation. Although it seems that there is evidence of internal marketing of the maintenance services too [6], in respect of the topic, the author argues for the importance of the external, purchased services. National reports about the situation of maintenance services are rarely published, therefore the author would like to examine this in the eastern region of Hungary, first of all in the Great Hungarian Plain.

## MATERIAL AND METHODS

Within the compass of the possibilities, the author decided on the completion of a survey aided by questionnaire sent by mail. Some business units

were surveyed with the help of the students are studying in the specialisation of Mechanical Engineering in the Agriculture and Food Industry at the speciality of Machine Stock Maintenance, who completed the questionnaires via face-to-face interviews with business units. The questions were about the data of the enterprise; the whole maintenance of machines and their service condition; some fields of repair, the quality, the logistics, the environment and its projects – relating to services – in the future.

The whole process of investigation is shown in Figure 3.



**Figure 3** The process of the questionnaire survey [2]

## RESULTS

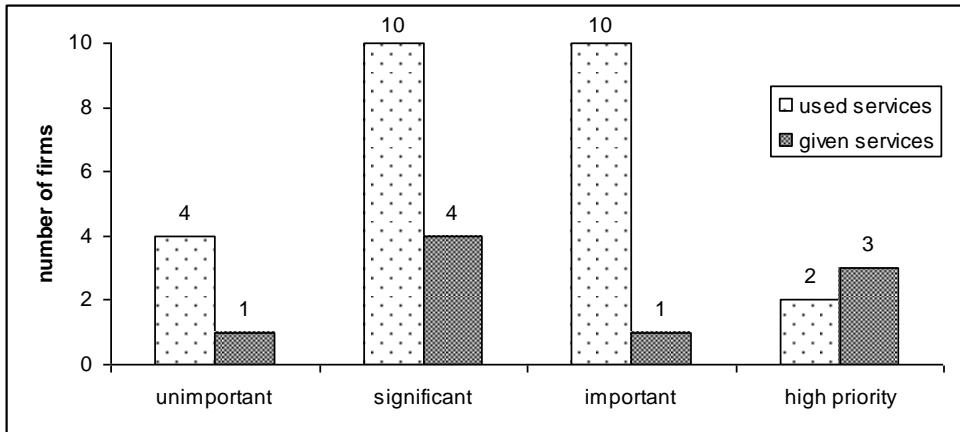
### Some characteristics of the firms that replied

36 enterprises returned the completed forms, all operating in the eastern region of Hungary [4]. These firms are producers, respectively productive-services. All of them deal with agriculture. A quarter of these are primary producers, 30.6 percent of the firms are family farm businesses, as well as 7 private companies 6 limited liability companies and 3 co-operatives also sent back the completed questionnaires. Half of the enterprises deal with only

crop production, 13 firms deal with animal husbandry, too. The average agricultural area is 1,077 hectares (the average size of the land cultivated by companies is 2,883 hectares while this is 28 hectares in the case of the primary producers and the average family farm size is 130 hectares). 58.3% of the agricultural producers that replied have fewer than 10 employees. All the private holdings (primary producers and family farms) are in this category.

It can be seen in Figure 4 that in the respondents' opinion the services utilized by them are significant (ascertained by 38.5% of them), important (claimed by also 38.5%), unimportant (stated by 15.4%); the

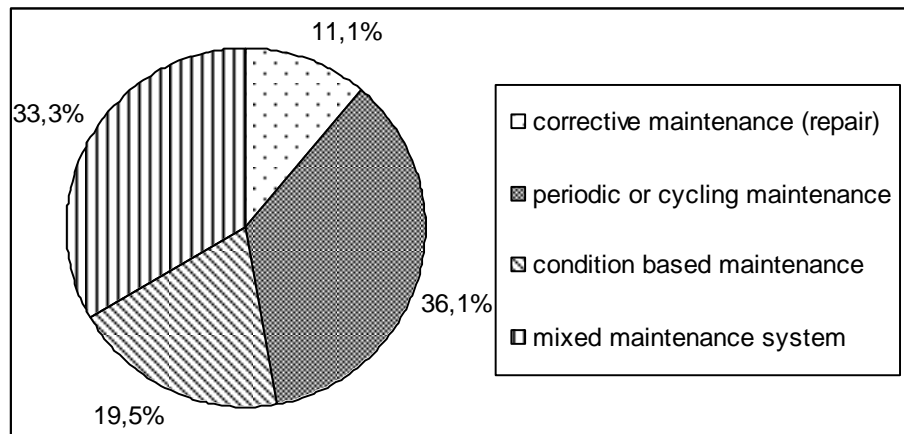
services given by them are very important (declared by 33.3% of them), significant (claimed by 44.4% of them), unimportant (stated by 11.1% of them) from the view of the whole business.



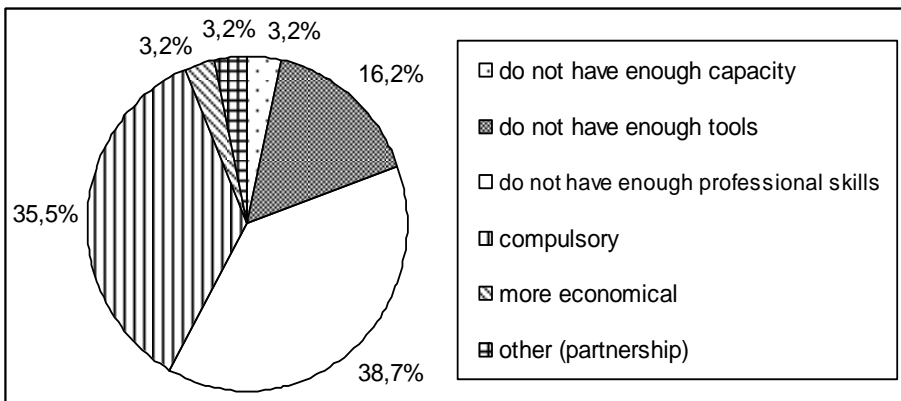
**Figure 4** Importance of the present services from the point of view of the firms  
[Source: own editing]

**RESEARCH ON OVERALL MAINTENANCE**

36.1% of the investigated firms follow a cyclic or periodic (preventative) maintenance system, 11.1% of them do corrective repair (this rate was 35.5 per cent in the survey carried out in 2004/2005 [12], so it was three times higher than now), 19.5% of them use the condition based (predictive) maintenance strategy and 33.3% of them have got a mixed maintenance system (Fig. 5).



**Figure 5** Proportion of applied maintenance philosophies  
[Source: own editing]

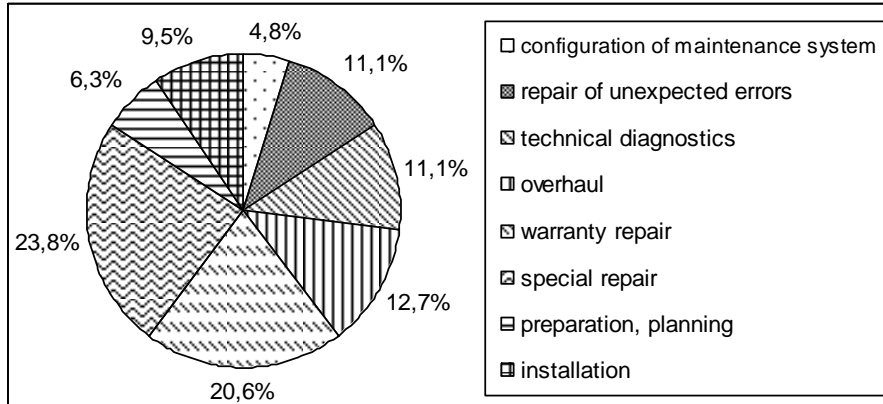


**Figure 6** Proportion of causes of the services employed  
[Source: own editing]

compulsory (35.5%), more economical (3.2%), they do not have enough professional skills (38.7%) (it is higher by 16.2 percentage point than in 2004 [12]) or enough instruments (16.2%) or capacity (3.2%) (it is lower by 16.6 percentage point than 10 years ago [12]).

In general, all business units use external maintenance services, because (Fig. 6) it is

It can be stated from Figure 7 that about 23.8% of the services employed deal with special repair, 20.6 percent of them are warranty repair, 11.1-11.1% engage in technical diagnostics or repair of unexpected errors, 12.7% of them deal with overhaul and 9.5 percent aim at installation. The cost of the external maintenance services employed are 18% of the total maintenance cost (which is less by one fifth than in 2003 [2, 10]), but this rate was between 10%-26.6%.



**Figure 7** Proportion of types of the maintenance services employed  
[Source: own editing]

Only one quarter of the enterprises under investigation provide services either because of partnership (50%) or appointed service (25%), and (only 8.3%) do so owing to financial reasons. 13.8% of the services provided are special repair, 27.7% make up for repairs of unexpected errors.

The operators do 56.2% of their own repair, 26.2% in external service. In 87% of the firms the tasks of machine storage are made by the operators (it is similar to that in 2004) [5]. All the firms protect against corrosion with their own instruments and employees as it was the case ten years ago [11, 12].

Five (55.6%) agricultural companies would like to introduce or extend the analysis of their customers' satisfaction in relation to maintenance services performed by them.

## CONCLUSION

Some conclusions from the findings and evaluations of the investigations are:

- it seems that the enterprises do not manage the maintenance according to its weight, but the cost of maintenance and the number of employees are important;
- most agricultural companies do not operate up-to-date maintenance systems;
- it seems that the pressure (specifications, shortages) are felt on both areas; the employed and provided services, and the quality, and the economy are motivating

factors only to a small degree, the demands of market do not predominate [9];

- the whole maintenance process needs development; the reasonable areas are: the introduction of maintenance systems, the problems of own or external maintenance.

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## A LEADER AS A SUCCESS FACTOR OF TEAMS IN INDUSTRIAL ENTERPRISES

PECHANOVÁ Ľubica, SOKOLOVSKÁ Barbora, CAGÁŇOVÁ Dagmar

### ABSTRACT

*This paper is focused on highlighting the importance of teamwork, teams and multicultural collaborative teams and also on choosing the appropriate team leader in industrial enterprises. The authors clarify theoretical backgrounds of teamwork, the characteristics of a successful multicultural collaborative team, as well as the characteristics of a successful team leader. The paper presents the results of a questionnaire survey, which was conducted in December 2014 and, inter alia, was also aimed at identifying the importance of teamwork in industrial enterprises in Slovakia and at the fact, whether industrial enterprises are interested in the elaboration of main principles and fundamentals of leadership in teams and the development of a competency model for the position of a team leader. The results of the questionnaire survey are explained in the paper and supported by graphical representation of the answers of respondents.*

### KEY WORDS

*team, multicultural, collaboration, teamwork, leadership, team leader, successful team*

### INTRODUCTION

Despite the fact that teamwork is applied in enterprises for a long time, nowadays, it makes a notable step forward. Team has become a recognized basic unit of organization of work. And for this there are many reasons. Teams have a huge potential. More and more enterprises and organizations discover that the consequences of the transition to the teamwork go much further than might be expected. The researches suggest that in all types of enterprises or organizations, whether in the public or private sector, teamwork improves work ethic and reduces fluctuation (Hayes 2005).

These days the expression cooperation is often replaced by the word collaboration. In our paper the difference is explained and its relation to the multicultural team.

People who are good and acquainted in their field can prove many - but not all. There are still tasks that individual alone cannot handle, in which he is dependent on knowledge, cooperation and ideas of others. Probably in any sphere, it is not working without teamwork (Mühleisen, Oberhuber 2008). The enterprises also realize that a competitive advantage can be gained particularly due to their employees, their cohesion, ideas, and especially cooperation. Of course, not every enterprise that will apply teamwork has significant results. Some enterprises have introduced teamwork and revealed no major differences. But one thing is certain: *If the teamwork is applied correctly, it will lead to fundamental changes* (Hayes 2005).

The importance of good leadership in any effort is obvious. An effective leader can add value in many ways, including an explanation of the mission and direction of the enterprise, a connection of the enterprise with its environment, mentoring and coaching of potential successors. Reality, however, shows that the effective leaders are rare kind of

people. Researchers, who study the concept of leadership, cannot agree on what constitutes the essence of effective leadership. The topic of ability to lead is shrouded in mystery and legends (Dvořáková 2012).

In the following text, the authors of the paper focus not only on description of the characteristics of a successful team and multicultural collaborative team but also on the determination of the characteristics of a successful team leader.

### 1. CHARACTERISTIC OF A SUCCESSFUL TEAM

In order for a team as a whole to be successful, it must meet certain assumptions. It is very important, how the work in team conducts, what are the goals of the team and what its members do. In Table 1, the authors of the paper indicate the characteristics of successful teams, defined by different authors.

A successful team is such, in which team members not only achieved something special and useful, but they have a feeling that they were involved in something special and useful (Garner 2012).

Of course, a team does not have to be always and in all circumstances successful. In practice it happens that the efficiency and performance of the team may be decreasing, which depends on various factors. As an example, the authors of the paper present Table 2, where are described the factors, respectively situations, when team effectiveness decreases.

**Table 1:** The characteristics of a successful team according to different authors (Source: own elaboration)

	<b>A successful team:</b>
Střížová 2005	<ul style="list-style-type: none"> <li>• it has common goals;</li> <li>• there exists a mutual relationship among members;</li> <li>• it has an effective relationship to the enterprise;</li> <li>• it has an agreed system of decision-making.</li> </ul>
Hayes 2005	<ul style="list-style-type: none"> <li>• it has a clear awareness of self as a group;</li> <li>• it enters into positive interaction with non-members of the team;</li> <li>• it creates positive assumptions and beliefs;</li> <li>• there is a clear communication.</li> </ul>
Heromochová 2006	<ul style="list-style-type: none"> <li>• it has a clear, motivating and achievable goal;</li> <li>• members are equipped with professional competencies;</li> <li>• it has the elaborated procedures to achieve set objectives.</li> </ul>
Urban 2008	<ul style="list-style-type: none"> <li>• it has the awareness of certain mission, which strengthens the internal cohesion of the team;</li> <li>• there is the existence of certain written and unwritten rules, by which a cooperation within the team is abided.</li> </ul>

**Table 2:** Reasons of decreasing team effectiveness according to different authors (Source: own elaboration)

<b>Author</b>	<b>Effectiveness of a team decreases if:</b>
Mohauptová 2013	<ul style="list-style-type: none"> <li>• people have bad relationships;</li> <li>• people are not able to agree (too long meetings, poor flows of information);</li> <li>• task is not suitable for more people, yet they are trying to do so;</li> <li>• people have too good relationships - at least with some colleagues from workplace, which is reflected in slandering others, or discussing anything else that is not related to work; the consequence is poor relationships with superiors and other people.</li> </ul>
Krüger 2004	<ul style="list-style-type: none"> <li>• team members represent the interests of their departments and not the interest of the team;</li> <li>• despite a considerable effort, there are no clear common goals; the individuals pursue their own goals;</li> <li>• individual team members suffer a participation in team as obtrusive matter; they argue that their main tasks are more important;</li> <li>• agreed times and agreements are not respected by all team members; individual participants have themselves apologized, they come too late or leave earlier and they fulfil assigned tasks only partially or not at all;</li> <li>• there is open or hidden competitive fight between individual team members;</li> <li>• they all mutually monitor and control each other, mostly with negative intentions; they do not speak openly very often;</li> <li>• members demonstrate a lack of loyalty to the team.</li> </ul>
Heromochová 2006	<ul style="list-style-type: none"> <li>• there is a disunity in the vision of a goal;</li> <li>• there is a lack of support and recognition from the outside of team;</li> <li>• there are shortcomings in communication and cooperation among team members and among team members and leadership.</li> </ul>

The authors engaged in the issues of teamwork, discuss the characteristics of a successful team. There are countless. The authors of the paper state that the success of a team depends on two key factors – on a leader and on the members. A leader has to understand the individual members of his team, but also members have to understand their

leader. Only in this way can arise a fruitful cooperation and a team will achieve desired outcomes.

## 2. CHARACTERISTIC OF A MULTICULTURAL COLLABORATIVE TEAM

According to the IFLA (2014) multiculturalism is “the co-existence of diverse cultures, where culture includes racial, religious, or cultural groups and is manifested in customary behaviours, cultural assumptions and values, patterns of thinking, and communicative styles”.

Members of multicultural teams hold diverse cultural identities which affect their understanding interpretation and manner of responding to various situations (Erez, et al. 1993).

Multicultural teams around the world struggle with intercultural conflicts, racial prejudice and socioeconomic inequalities. With increasing migration and highly different international cities, multicultural teams are becoming more common. But a large number consists of one dominating culture where people from minority cultures must adapt to survive (Hibbert et al. 2014).

Multicultural teams often suffer because individuals struggle to understand, trust or relate to people with different backgrounds or perspectives which can lead to tension, hostility, lack of cooperation and poor communication, which ultimately undermine team performance (Paunová 2014).

Multicultural teams need more time for decision-making and problem solving than homogeneous groups. They constitute the major complications in discussions and conflicts in the elaboration of assigned tasks. Multicultural team members often misinterpret what their colleagues say, and it slows down the progress of the team. In order to communicate effectively in another language, we need not only to learn its vocabulary and grammatical structures, but also to learn about the social structures, values, and assumptions of the culture (Hibbert, et al. 2014). That is the reason why multicultural teams need skilled leaders with

experiences in cooperating with people of different cultures and nationalities in order to make team's work effective.

For multicultural teams more time for decision-making and problem solving is needed in comparison with homogeneous groups. They constitute the major complications in discussions and conflicts in the elaboration of assigned tasks. Multicultural team members often misinterpret what their colleagues say, and it slows down the progress of the team. In order to communicate effectively in another language not only learning of vocabulary and grammatical structures is needed but also learning about the social structures, values, and assumptions of the culture (Hibbert et al. 2014). Previous statements are the main reasons why multicultural teams need skilled leaders with experience in cooperating with people of different cultures and nationalities in order to make a team's work effective.

Unlike homogenous teams, which tend to converge on solutions prematurely, come to agreements without considering all factors, share assumptions that can be incorrect, have a narrower pool of knowledge or experience, ignore discrepant information in order to preserve the spirit of the team, multicultural teams can do very well on complex tasks because they have different perspectives, a wider array of information, deeper consideration, broader exploration of ideas, consideration of an issue from many angles and out-of-the-box thinking (Paunová 2014).

Sooner or later, homogenous teams are usually outperformed by multicultural teams.

Almost anything is, in principle, possible through collaboration because you are not limited by your own resources and expertise. You can, in general, achieve whatever visions you may have by tapping into resources and expertise of others (Huxham 2005).

**Table 3:** Definition of collaboration (Source: own elaboration)

Author	Definition of collaboration
Huxham 2005	We use the term collaboration to refer to any situation in which people are working across organizational boundaries towards some positive end.
Nemiro et al. 2008	Collaboration occurs when individuals work together toward a shared goal, completing the work is dependent on relationships with a purpose, and individuals working together in purposeful ways toward a shared goal are committed to one another's success.
Stoner 2013	Collaboration is working together to create something new in support of a shared vision. The key points are that it is not through individual effort, something new is created, and that the glue is the shared vision.

From this information we can define multicultural collaborative team as a *group of people of different cultures and nationalities with long-term closed*

*relationship who purposely work together toward a shared goal.*

### 3. CHARACTERISTIC OF A SUCCESSFUL TEAM LEADER

From the study of literature concerning teams and also from the experience, it can lead to the realization that for the atmosphere in a team and its performance, it is extremely important how a team is led (Hermochová 2006). Achievements thus depend on the personality of a leader and on leadership styles, which he uses (Duchoň, Šafránková 2008).

Practice shows that even highly developed teams, which already work very cooperative, do not get along without a leader. When everyone feels responsible for everything and work is not divided according to the tasks and capabilities, a team will become unproductive (Krüger 2004).

So as for teams already developed, mature and also for those, which are just in the beginning of their development process, it is necessary to find a suitable leader as "the first among equals" (Krüger 2004).

A team therefore needs a team leader - a personality that can knead, inspire, motivate and reward (Halík 2008). When a leader supports team members, he is becoming a model in order for members to support also each other and not to be afraid to take also risks of new ways of solving set tasks. Team members then better understand the vision of the enterprise, they are able to overcome the stagnation and they understand that changes are possible (Hermochová 2006).

Significantly better results achieve teams whose leader has the ability to force others in a positive approach to follow him or perform assigned tasks gladly (Duchoň, Šafránková 2008). The experts have made and they are also still making a great effort to identify, possibly describe the characteristics of "successful" team leaders (Hermochová 2006).

Every expert who deals with leadership and leaders examines which characteristics every successful leader should have (Sokolovská, Cagáňová, Woolliscroft 2014), respectively what all should a team leader do in order to effectively lead his team to the achievement of his set goals on condition that each member should not only satisfy the needs of the enterprise, but also own ones.

In Table 3, the authors of the paper state what all should a team leader do in order to be successful and to ensure the efficient functioning of the team.

For anyone, who is a team leader within some enterprise, it follows a dilemma: he has to fulfil the requirements (needs) of the enterprise, and simultaneously the needs of employees. This is not an easy task. An effective leader therefore is not one-side "specialist in human relations", who focuses exclusively on meeting the needs of subordinates, or only "specialist in high performance", who is

unilaterally trying to meet the needs of the enterprise (Hermochová 2006).

Multicultural team leaders need to develop intercultural competence — the ability to respond and relate effectively to team members from a wide variety of cultures. Intercultural competence enables the team leader to recognize the expectations that various team members have concerning leadership, to foster effective team communication, and to enhance relationships between team members. By understanding other cultures, the team leader becomes more aware of how their words and behaviour can be misinterpreted and is more capable of accurately interpreting individuals' responses in discussion and decision making. Intercultural competence can prevent the team leader from unnecessarily offending team members and feeling personally offended by cultural differences. (Mohauptová 2013)

The role of each manager in leadership is very difficult and important. This is a wide range of activities with the aim to achieve managerial intentions. The effectiveness of his action depends on his collaborators, their interest, deployment, initiative, effort, promptness, adaptability and activities. The action of manager on activity of employees can take different forms, such as influence, guidance, encouragement, motivation, leadership or managing people, coaching, delegation and so on (Duchoň, Šafránková 2008).

The role of a team leader pretty much affects the overall functioning of a team and its performance. Each team - whether newly created or highly developed - needs its leader. As various authors claim, the person of a leader should have certain desirable characteristics, which are countless. The authors of the paper consider important that a leader is aware of his important role and that his primary aim is to ensure the functioning of a team and creating good interpersonal relationships in it, and then fulfilment of goals of the enterprise.

In the following text, the authors of the paper connect the theoretical backgrounds, which were previously mentioned, with the results of the questionnaire survey conducted by the authors of the paper.

**Table 4:** Characteristics of a successful team leader according to different authors (Source: own elaboration)

Author	What all should a successful leader do
Jarošová et al. 2001	<ul style="list-style-type: none"> <li>• he has a skill to lead and stimulate employees towards teamwork, which is supported by knowledge of team roles;</li> <li>• he knows the art of leading and managing the work meetings;</li> <li>• he has the ability to lead a team in a situation of problem solving.</li> </ul>
Hermochová 2006	<ul style="list-style-type: none"> <li>• he subordinates his personal needs to the needs of group goals;</li> <li>• he passes a part of his role to others - he allows team members to participate in decision making and to develop skills necessary for leadership in each individual;</li> <li>• he delivers the courage and confidence to members of his team in order to assume a part of the responsibility for implementation of changes and not only to fulfil the set tasks.</li> </ul>
Střížová 2005	<ul style="list-style-type: none"> <li>• he leads and coaches more than controls directive (strengthens a personal style of leadership);</li> <li>• he carefully determines the types of expertness and knowledge required for teams in order to meet customer needs;</li> <li>• he gives the team responsibility for creating innovations, but at the same time, he supports them by leadership and resources, and an appropriate combination of the unique contributions of each member (team selection).</li> </ul>
Halík 2008	<ul style="list-style-type: none"> <li>• he is able to introduce his plan to people and to get them for him;</li> <li>• he is convincing for them;</li> <li>• it is necessary for him to be able to maintain an appropriate distance;</li> <li>• he is not influenced by personal ties and relationships;</li> <li>• he does not threaten;</li> <li>• he does not provoke an atmosphere of fear;</li> <li>• he is an empathic;</li> <li>• he is able to drag people into solving tasks - to motivate them to action;</li> <li>• he sets realistic, although ambitious goals;</li> <li>• he separates privacy from profession.</li> </ul>
Apex Leadership 2012	<ul style="list-style-type: none"> <li>• he understands and interprets the broader goals of the enterprise;</li> <li>• he express the clarity of vision;</li> <li>• he communicates;</li> <li>• he organizes;</li> <li>• he motivates others;</li> <li>• he coaches others to deliver performance;</li> <li>• he delegates;</li> <li>• he facilitates the work;</li> <li>• he builds relationships;</li> <li>• he influences.</li> </ul>

#### 4. RESULTS OF THE QUESTIONNAIRE SURVEY

In the following part of the paper, the authors present the results of a questionnaire survey. This is a pilot survey, which is a part of the dissertation thesis solved at the Institute of Industrial Engineering and Management, Faculty of Materials Science and Technology, Slovak University of Technology. Dissertation thesis is focused on addressing the issue of leadership in teams and competencies of the team leader.

A pilot survey was conducted through questionnaire survey, which was aimed at industrial enterprises in Slovakia. The questionnaire was made with the

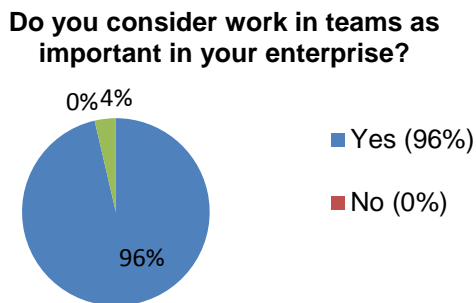
application GoogleDocs. It consisted of eight questions, while the first three were designed to obtain basic information about the enterprise - size, subject of business activity and branch of industry. Another five questions served to obtain the information concerning leadership, teamwork and competency model in the particular enterprise.

Data collection took place in the time period from 6 December 2014 to 31 December 2014. The questionnaire was sent to email addresses of 515 respondents, while 55 questionnaires were returned completed. The return thus constitutes 10.68%.

In the paper, the authors specifically focus on four questions from the questionnaire survey. In the following text, there are gradually explained and also

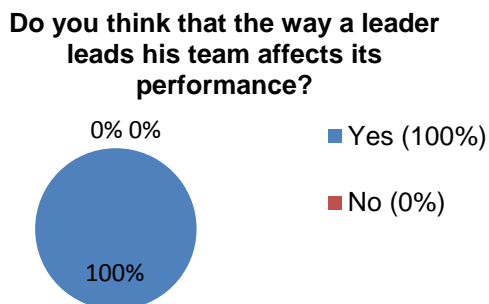
graphically illustrated the answers of respondents to selected four questions.

The first of selected four questions was focused on the importance of teamwork in the enterprise. It is positive that almost all, i.e. 53 respondents, consider work in teams in an enterprise as important. Only two respondents were unable to answer this question, which may be caused due to the fact that these enterprises do not apply work in teams and therefore the respondents cannot assess its importance to the enterprise. The percentage expression of the answers of respondents can be seen in Figure 1.



**Figure 1:** The answers to the question: Do you consider work in teams as important in your enterprise?  
Source: own elaboration

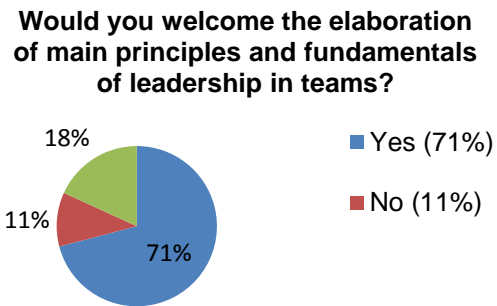
Another question served to investigate the opinion of respondents on whether the performance of the team is affected by the way a leader leads his team. Everyone, i.e. 55 respondents, answered this question clearly yes. The percentage expression of the answers of respondents can be seen in Figure 2.



**Figure 2:** The answers to the question: Do you think that the way a leader leads his team affects its performance?  
Source: own elaboration

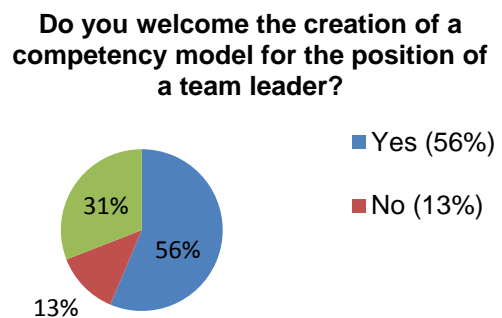
Through another of four selected questions, the authors of the paper sought to determine whether the enterprises would welcome the elaboration of main principles and fundamentals of leadership in teams. Surprisingly, up to 39 respondents would

appreciate the elaboration of main principles and fundamentals of leadership in teams, which would facilitate the functioning of teams and achieving higher performance, when both sides are satisfied with the cooperation – on the side of manager and also on the side of team members. 6 respondents refused this option and 10 respondents were unable to answer this question, which may be caused due to lack of information to answer the question. The percentage expression of the answers of respondents can be seen in Figure 3.



**Figure 3:** The answers to the question: Would you welcome the elaboration of main principles and fundamentals of leadership in teams?  
Source: own elaboration

Through the last of four selected questions, the authors of the paper identified whether enterprises would be interested in creation of a competency model for the position of a team leader. More than a half, i.e. 31 respondents, would welcome the creation of a competency model for a team leader. 7 respondents rejected this option and 17 of them were not able to express to this question, which may be caused due to the lack of information to answer this question. The percentage expression of the answers of respondents is shown in Figure 4.



**Figure 4:** The answers to the question: Do you welcome the creation of a competency model for the position of a team leader?  
Source: own elaboration

In the following text, the authors of the paper summarize the answers of respondents to the selected four questions.

It is a positive finding that nearly all respondents considered teamwork in enterprises as important. Among the respondents, there was a clear consensus in the opinion of the fact that the performance of a team is affected by the way a leader leads it.

From the answers followed that nearly three quarters of respondents would welcome the elaboration of main principles and fundamentals of leadership in teams and more than a half of respondents would also welcome the creation of a competency model for the position of a team leader.

The answers of respondents thus pointed out that it makes sense to deal with the issue of leadership in teams further.

The authors of the paper highlight the fact that the elaboration of main principles and fundamentals of leadership in teams will represent for a team leader certain procedure how to properly cooperate with people in the team. A creation of a competency model for the position of a team leader ensures the occupation of a position with a candidate, who meets all the prerequisites for successful handling of this role

## CONCLUSION

The purpose of this paper was not only to determine what importance is attached to teamwork in industrial enterprises in Slovakia, but also to highlight the importance of choosing the appropriate team leader. The authors of the paper also examined the fact whether industrial enterprises would welcomed the elaboration of main principles and fundamentals of leadership in teams, as well as the creation of a competency model for the position of a team leader.

In the previous part of the paper the authors presented the results of a questionnaire survey. These results confirmed that teamwork has its application in industrial enterprises and employees really consider it as an important form of work organization. Respondents clearly agreed on the fact that the team's performance is affected by the way a leader leads his team. Of this the authors of the paper can conclude that it is important to place the emphasis on choosing the appropriate team leader. From the answers of respondents to other questions, the authors of the paper can deduced that industrial enterprises in Slovakia would welcome the elaboration of main principles and fundamentals of leadership in teams, as well as the creation of a competency model for the position of a team leader.

On the basis of the obtained information, the authors of the paper can claim that ensuring the effective functioning of the teams depends on two key factors, namely on a team leader and also on the way a

leader leads his team. This can be achieved by elaborating main principles and fundamentals of leadership in teams, which will represent for a team leader a certain process, how to properly cooperate with people in a team and by creating a competency model for the position of a team leader, which ensures the occupation of a position by a candidate, who meet all the assumptions to handle this role.

The authors of the paper admit some limitations of conducted research, such as the low return of completed questionnaires, which can distort the results.

Although the authors of the paper emphasize the importance of the obtained information and recommend to deal with this issue further, especially the selection of the most suitable candidate for the position of a team leader and the elaboration of main principles and fundamentals of leadership in teams, which will provide to selected candidate a certain guide how to proceed in leadership of teams.

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## NÁVRH KONCEPTU UDRŽATEĽNEJ MARKETINGOVEJ STRATÉGIE PRIEMYSELNÉHO PODNIKU NA ZVÝŠENIE JEHO UDRŽATEĽNEJ KONKURENCIESCHOPNOSTI PROSTREDNÍCTVOM FORMOVANIA POZITÍVNEHO IMIDŽU

### DESIGN CONCEPT OF SUSTAINABLE MARKETING STRATEGY OF INDUSTRIAL ENTERPRISE TO INCREASING IT'S SUSTAINABLE COMPETITIVENESS THROUGH THE FORMATION A POSITIVE IMAGE OF ENTERPRISE

ŠUJAKOVÁ Monika, VAŇOVÁ Jaromíra, SAKÁL Peter

#### ABSTRAKT

*V príspevku sa zaoberáme využitím udržateľnej marketingovej stratégie priemyselného podniku na zvýšenie jeho udržateľnej konkurencieschopnosti prostredníctvom formovania pozitívneho imidžu založeného na súčasných trendoch marketingovej komunikácie. V článku sú uvedené aj čiastočné výsledky z dotazníkového prieskumu realizovaného na Ústave priemyselného inžinierstva a manažmentu MTF STU v Trnave.*

#### KLÚČOVÉ SLOVÁ

*marketing manažment, udržateľný marketing, udržateľný marketingový mix, udržateľný komunikačný mix, marketingové nástroje, udržateľný rozvoj*

#### ABSTRACT

*In the article discusses the use of sustainable marketing strategy of an industrial enterprise to increase its sustainable competitiveness through the formation of a positive image based on the current trends in marketing communications. The article presents also the partial results of the questionnaire survey conducted at the Institute of Industrial Engineering and Management MTF STU in Trnava.*

#### KEY WORDS

*marketing management, sustainable marketing, sustainable marketing mix, sustainable communication mix, marketing tools, sustainable development*

#### ÚVOD

Povaha súčasného globalizovaného sveta determinuje všetky aspekty pôsobenia ľudí. Súčasný marketingový manažment pôsobiaci v rámci hyperkonkurenčného trhu musí pružne reagovať na vzrastajúcu tendenciu spoločnosti kriticky hodnotiť praktiky v jeho rámci. Spoločenská reflexia neetických prístupov marketingového manažmentu v dobe 21. storočia je evidentným fenoménom, ktorý ho stavia pred výzvou prekonať staré neefektívne spôsoby riadenia a dôležitosť implementácie prvku „*udržateľnosti*“ do marketingového riadenia.

Tradičné prístupy riadenia sa pri súčasnom dramatickom tempe inovácii v oblasti technológií, ako dôležitého nástroja globalizačných procesov, a taktiež celkovo sa meniacom podnikateľskom a marketingovom prostredí, ukazujú ako nedostatočné. Súčasnú povahu marketingu a marketingového riadenia je v kontexte interdisciplinárneho prístupu ťažké explicitne definovať. Jeho súčasnú úlohu a podstatu je možné chápať jedine s ohľadom na paradigmatické zmeny, ktorými prešiel. Ako uvádza Capra vo svojej publikácii *Skryté súvislosti*, že: „...ak chceme problém organizačných zmien vyriešiť, musíme najskôr pochopiť povahu prirodzených procesov zmeny, ktoré sú súčasťou všetkých živých

*systémov. Keď im porozumieme, môžeme začať s navrhovaním príslušných procesov organizačných zmien a s vytváraním ľudských organizácií, ktoré budú odzrkadľovať prispôsobivosť, rozmanitosť a tvorivosť.“*, (Capra, 2009, s. 103).

Povaha zmien v marketingovom prostredí súvisí s novými sociálnymi skutočnosťami vyjadrujúcimi bezprecedentné marketingové správanie, príležitosti či výzvy. Medzi nich Kottler a Keller zaradujú dvanásť elementov (sieťové informačné technológie, globalizáciu, dereguláciu, privatizáciu, zvýšenú konkurenciu, konvergenciu priemyslu, transformáciu maloobchodov, kúpna sila spotrebiteľov, informovanosť spotrebiteľov, participácia spotrebiteľov či ich odolnosť (Kottler, Keller, 2007, s. 12-14), ktoré pre marketérov predstavujú nie len výzvu, ale vzhľadom k ich charakteru, taktiež možnosť. V intenciách nášho výskumu za dôležitý prvok nových možností považujeme zvlášť informačné technológie. V tejto súvislosti Capra uvádza, že: „...*revolúcia v oblasti informačných technológií nielen že umožnila vznik nového hospodárstva, ale do veľkej miery pretransformovala tradičné mocenské vzťahy. Vo veku informácií sa tvorba sietí stala zásadnou organizačnou formou všetkých spoločenských oblastí. Hlavné spoločenské funkcie sú čím ďalej, tým viac organizované okolo sietí, pričom členstvo v týchto*

sieťach je rozhodujúcim zdrojom moci.“, (Capra, 2009, s. 146).

Aby sme docielili komplexnejší pohľad na transformáciu marketingového prostredia, v ktorom sa v súčasnej dobe vyžaduje implementácia stratégie udržateľného marketingu, považujeme za dôležité stručne uviesť evolúciu skorších, dnes neefektívnych prístupov riadenia, ako ich uvádzajú Kottler a Keller.

Za jeden z najstarších konceptov uvedení autori uvádzajú koncept produkcie, založený na idey široko dostupných a finančne nenáročných produktov. Manažéri takto orientovaných podnikov sa preto sústredili na vysokú účinnosť výroby, nízke náklady a masovú distribúciu. Konceptia produktu, ako ďalší koncept v kontinuite vývoja, bol založený na predpoklade, že spotrebiteľia uprednostňujú výrobky, ktoré ponúkajú vysokú kvalitu, výkon a inovatívne prvky. Tieto atribúty však nie sú zárukou úspechu bez kladenia dôrazu na distribúciu, reklamu a vhodný predaj. Tretím konceptom je koncept predaja. Ide o pomerne agresívnu stratégiu pevného predaja, ktorý sa nezameriava na požiadavky trhu, ale zákazníkom svoj výrobok istým spôsobom „vnúti“. Značnú diferenciu môžeme sledovať v rámci marketingového konceptu, ktorého filozofia je zameraná na zákazníka ako centrum pozornosti, filozofiu vnímania a reagovania vzhľadom k požiadavkám trhu. Protikladnosť

s predchádzajúcou koncepciou spočíva v tom, že zatiaľ čo tá hľadala správneho spotrebiteľa k svojmu výrobku, marketingová koncepcia hľadá správny výrobok pre spotrebiteľa. Tu sa dostávame k poslednému, v súčasnosti najmodernejšiemu konceptu, ktorý predstavuje **„holistická marketingová koncepcia“**. Tá sa rozvíjala od prvej dekády 21. storočia a je založená na vývoji, projektovaní a realizácii marketingových programov, procesov a činností, ktoré sú vo vzájomnej interakcii a závislosti. Je determinovaná názorom, že dôležité je všetko a integrovaný pohľad sa stáva nevyhnutným, (Kottler, Keller, 2007, s. 18-19).

Uvedená nová paradigma marketingu zahrňuje širokú škálu výziev a úloh pre marketérov v súčasnej komplikovanej dobe. Môžeme povedať, že v holistickej koncepcii je prirodzene involvovaná požiadavka udržateľnosti, okrem ďalších dôležitých komponentov, ktoré vzhľadom k zameraniu tohto príspevku nebudeme ďalej špecifikovať. Ako uvádza Bartáková, Gubíniová: *„pre implementáciu udržateľného marketingového manažmentu je nevyhnutné na úrovni organizácie prehodnotiť mnohé doterajšie marketingové aktivity týkajúce sa zákazníckych potrieb, jednotlivých prvkov marketingového mixu, zodpovednosti.“*, (Bartáková, Gubíniová, 2012, s. 35).

## UDRŽATEĽNÝ MARKETING V KONTEXTE UDRŽATEĽNÉHO ROZVOJA

Marketing sa v minulosti zaoberal nachádzaním a uspokojovaním zákazníckych potrieb tak, aby bol na jednej strane spokojný zákazník a na druhej strane, aby organizácia dosiahla stanovený stupeň ziskovosti. Uspokojovanie potrieb, čo je jedným z hlavných cieľov marketingu, sa venujú mnohí autori ako v minulosti, tak aj dnes. S rozvojom marketingu, odborná verejnosť a postupne aj marketingoví manažéri z praxe začali rozvíjať spoločenskú kritiku marketingu. Spoločenská kritika marketingu zdôrazňuje, že mnoho marketingových aktivít škodí konečným zákazníkom, organizáciám pôsobiacim na trhu, aj celej spoločnosti.

V súčasnosti by sa mala pozornosť upriamiť na vplyvy rôznych marketingových aktivít na zaťaženosť prostredia, ekológiu, zdravie obyvateľstva v porovnaní s minulosťou, kedy podstata marketingového manažmentu spočívala na vybraných stratégiách v oblasti produktu, v oblasti distribúcie a mnohé iné. Rôznym konceptom marketingového manažmentu (zelený marketing, udržateľný marketing, ekologický marketing) predchádzala pomerne mohutná spoločenská kritika marketingu, ktorá poukazuje na to, že mnohé marketingové aktivity v súčasnosti škodia konečným zákazníkom, spoločnosti, ale aj konkurenčným organizáciám, (Bartáková, Gubíniová, 2012).

Udržateľný rozvoj možno chápať ako ideálny stav, kedy sú všetky prvky globálneho ekosystému v rovnováhe, (Bussard, 2016). Tento nový pohľad na podnikateľskú sféru znamená aj zmenu zaužívaných marketingových praktík. Vo sfére podnikania, udržateľnosť so sebou prináša riešenie množstva čiastkových problémov, medzi ktoré patrí, (Šmida, Hrdinová, Sakál, 2016):

- udržateľná výroba;
- udržateľný zisk;
- udržateľná spotreba;
- udržateľný marketing.

Podľa Wellsa (2013) je udržateľný marketing definovaný ako hľadanie dlhodobej či krátkodobej udržateľnosti medzi organizáciou a zákazníkmi, pričom práve udržateľný marketing smeruje k vytváraniu dlhodobých cieľov v oblasti získavania zdrojov z prírody a jej navrátenie späť do prírody, či už v podobe ekologického a environmentálneho zvýhodnenia alebo pomocou podpory predaja zelených produktov a ich dopadu na prostredie, spotrebiteľa i budúcu generáciu firiem a spotrebiteľov.

Udržateľný marketing pozostáva s nasledovných zložiek udržateľného marketingového mixu, (Sakál, 2013):

- udržateľná cena;
- udržateľný produkt;
- udržateľná distribúcia;
- udržateľná propagácia.

Tak ako udržateľný marketingový mix, tak aj udržateľný komunikačný mix, zahŕňa kombináciu jednotlivých nástrojov, (eMarketing, 2016).

Každý podnik sa môže ľubovoľne rozhodnúť o svojom udržateľnom komunikačnom mixe, o priradení dôležitosti a percentuálneho podielu z celkového rozpočtu na propagáciu jednotlivým komunikačným nástrojom, (Kender, 2005).

V dotazníkovom prieskume „Udržateľné spoločensky zodpovedné podnikanie č.7“ sme zisťovali súčasnú situáciu využitia udržateľnej marketingovej komunikačnej stratégie priemyselného podniku (na zvýšenie jeho udržateľnej konkurencieschopnosti prostredníctvom formovania pozitívneho imidžu založeného na súčasných trendoch marketingovej komunikácie. Dotazníkový prieskum sa týkal priemyselných podnikov sídlacích na území Slovenskej republiky. Snažili sme sa poukázať na súčasnú situáciu vo využívaní udržateľnej marketingovej stratégie v priemyselných podnikov na území Slovenskej republiky.

### DOTAZNÍKOVÝ PRIESKUM „UDRŽATEĽNÉ SPOLOČENSKY ZODPOVEDNÉ PODNIKANIE Č. 7

Dotazník „Udržateľné spoločensky zodpovedné podnikanie č. 7“ pozostáva z nasledovných oblastí:

1. identifikačné otázky,
2. udržateľná marketingová stratégia podniku (Monika Šujaková),
3. kompetenčný prístup riadenia ľudských zdrojov (Lukáš Jurík).

Pred realizáciou samotného dotazníkového prieskumu sme si, na základe overenej metodiky na UPIM MTF STU Trnava, vytvorili súbor 8 predpokladov, ktoré boli zapracované do dotazníkového prieskumu. Následne sme zostavili výskumné otázky a určili závisle a nezávisle premenné. Druhý okruh otázok pozostáva z 8 výskumných otázok a 6 doplňujúcich otázok z oblasti udržateľnej marketingovej stratégie podniku ako nástroja pre tvorbu pozitívneho imidžu podniku, (tab.1).

Dotazník k 26.2.2016 vyplnilo 134 respondentov. Návratnosť dotazníka bola 37,12%. Návratnosť dotazníka považujeme za dostatočnú vzhľadom na dĺžku dotazníka, početnosť otvorených otázok a zaneprázdnenosť zamestnancov oslovených podnikov. Návratnosť odpovedí sme sa usilovali zvýšiť prostredníctvom sociálnych sietí, telefonických rozhovorov a osobných kontaktov s respondentmi.

Pre účel výskum sme zvolili cieľovou skupinou skupinu respondentov, ktorí patria do oblasti „Priemyselnej výroby“. Počet týchto respondentov je 75, čo predstavuje 56% z celkového počtu respondentov

**Tab. 1** Súbor predpokladov a výskumných otázok, zdroj: vlastné spracovanie

Predpoklad	Výskumná otázka
P1: Viac ako 50% priemyselných podnikov na území Slovenskej republiky má vypracovanú stratégiu svojho rozvoja.	VO1: Má Váš podnik vypracovanú stratégiu svojho rozvoja?
P2: Viac ako 50% priemyselných podnikov na území Slovenskej republiky nemá hierarchicky rozčlenenú stratégiu svojho rozvoja.	VO2: Máte stratégiu rozvoja Vášho podniku členenú aj hierarchicky?
P3: Viac ako 50% priemyselných podnikov na území Slovenskej republiky nemá stratégiu orientovanú na UR.	VO3: Je Vaša podniková stratégia orientovaná na udržateľný rozvoj?
P4: Viac ako 50% priemyselných podnikov na území Slovenskej republiky nemá svoju marketingovú stratégiu orientovanú na UR svojho podniku.	VO4: Je marketingová stratégia Vášho podniku orientovaná na udržateľný rozvoj?
P5: Viac ako 50% priemyselných podnikov na území Slovenskej republiky využíva svoju marketingovú stratégiu na tvorbu pozitívneho imidžu.	VO5: Využívate vo Vašom podniku marketingovú stratégiu pre podporu pozitívneho imidžu spoločnosti?
P6: Viac ako 50% priemyselných podnikov na území Slovenskej republiky nevyužíva nástroje e-marketingu v marketingovej komunikácii na tvorbu pozitívneho imidžu spoločnosti.	VO6: Aké marketingové nástroje využívate vo Vašom podniku v marketingovej komunikácii pre podporu pozitívneho imidžu spoločnosti?

P7: Viac ako 50% priemyselných podnikov na území Slovenskej republiky nevyužíva nástroje „word of mouth“ marketingu v marketingovej komunikácii na tvorbu pozitívneho imidžu spoločnosti.

VO7: Ktoré z nástrojov e-marketingu využívate vo Vašom podniku pre podporu pozitívneho imidžu spoločnosti?

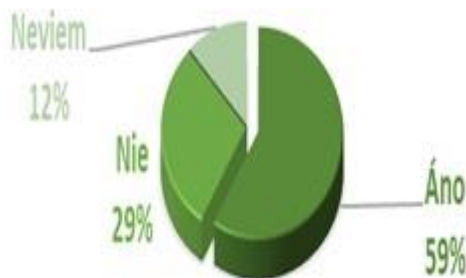
P8: Viac ako 50% priemyselných podnikov na území Slovenskej republiky nevyužíva nástroje virálneho marketingu v marketingovej komunikácii na tvorbu pozitívneho imidžu spoločnosti.

VO8: Ktoré z nástrojov „word of mouth“ marketingu využívate vo Vašom podniku pre podporu pozitívneho imidžu spoločnosti?

Dotazníkový prieskum slúžil na získanie, čo najvyššieho počtu odpovedí na otázky týkajúce sa vyššie spomenutých oblastí. Pre potreby tohto článku bol vybratý súbor piatich výskumných otázok.

## ZÁVERY Z DOTAZNÍKOVÉHO PRIESKUMU UDRŽATEĽNÉ SPOLOČENSKY ZODPOVEDNÉ PODNIKANIE Č. 7

Na hlavnú výskumnú otázku (obr. 1) „Má Váš podnik vypracovanú stratégiu svojho rozvoja?“, odpovedalo 59% respondentov z celkového počtu respondentov kladne. Záporne sa vyjadrilo 29% respondentov, že nemá vypracovanú stratégiu svojho podniku a 12% sa nevedelo k danej otázke vyjadriť. Predpoklad „Viac ako 50% priemyselných podnikov na území Slovenskej republiky má vypracovanú stratégiu svojho rozvoja.“, je potvrdený, vzhľadom na to, že väčšina respondentov sa vyjadrila kladne na danú výskumnú otázku

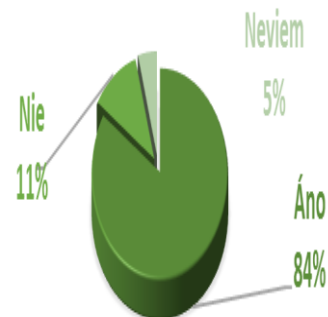


Obr. 1 Odpovede na otázku: Má Váš podnik vypracovanú stratégiu svojho rozvoja?, zdroj: vlastné spracovanie

Z odpovedí k hlavnej výskumnej otázke (obr. 2) „Je Vaša podniková stratégia orientovaná na udržateľný rozvoj?“ vyplýva, že 84% podnikov, ktoré majú vypracovanú stratégiu svojho podniku, majú túto stratégiu orientovanú na udržateľný rozvoj. 11% respondentov uviedlo, že stratégiu svojho podniku má vypracovanú, avšak nemá ju orientovanú na

udržateľný rozvoj a 5% podnikov sa nevedelo k danej otázke vyjadriť.

Predpoklad „Viac ako 50% priemyselných podnikov na území Slovenskej republiky nemá stratégiu orientovanú na udržateľný rozvoj.“ je potvrdený, vzhľadom na to, že 50,7% respondentov, buď nemá vypracovanú stratégiu podniku alebo ak ju má, nemá ju orientovanú na udržateľný rozvoj. Podniky, ktoré sa zúčastnili dotazníkového prieskumu uviedli, že keď majú vypracovanú stratégiu svojho podniku, je táto stratégia v 84% orientovaná na udržateľný rozvoj.

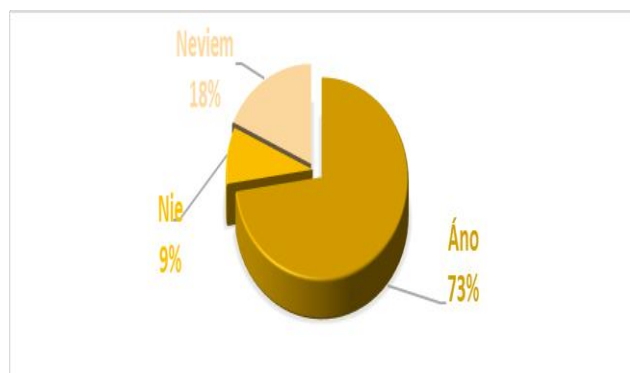


Obr. 2 Odpovede na otázku: Je Vaša podniková stratégia orientovaná na udržateľný rozvoj?, zdroj: vlastné spracovanie

Z odpovedí na výskumnú otázku (obr. 3) „Je marketingová stratégia Vášho podniku orientovaná na udržateľný rozvoj?“ vyplýva, že len 44% podnikov, využíva marketingovú stratégiu na podporu podnikovej stratégie. Z tohto množstva podnikov má až 73% podnikov marketingovú stratégiu orientovanú na udržateľný rozvoj. 9% podnikov uviedlo, že i keď marketingovú stratégiu podniku má, nemá ju orientovanú na udržateľný rozvoj a 18% respondentov sa nevedelo k danej otázke vyjadriť.

Predpoklad „Viac ako 50% priemyselných podnikov na území Slovenskej republiky nemá svoju marketingovú stratégiu orientovanú na udržateľný rozvoj svojho podniku.“, zostal potvrdený, vzhľadom na to, že 68% respondentov buď nevyužíva marketingovú stratégiu na podporu podnikovej stratégie alebo ak ju využíva, tak ju nemá

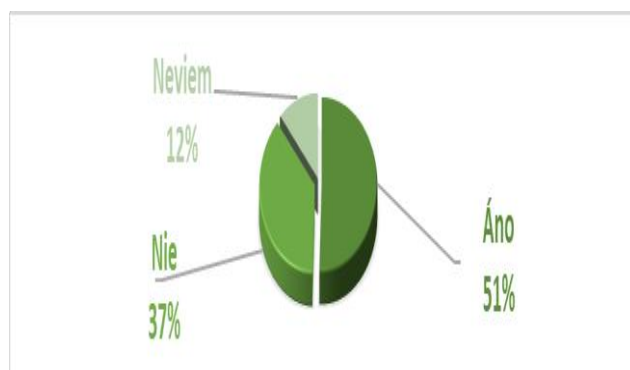
orientovanú na udržateľný rozvoj. Z odpovedí vyplynulo, že ak už podniky využívajú marketingovú stratégiu na podporu podnikovej stratégie, je táto stratégia v značnej väčšine orientovaná na udržateľný rozvoj podniku.



**Obr. 3** Odpovede na otázku: Je marketingová stratégia Vašho podniku orientovaná na udržateľný rozvoj?, zdroj: vlastné spracovanie

Z odpovedí k výskumnej otázke (obr.4) "Využívate vo Vašom podniku marketingovú stratégiu pre podporu pozitívneho imidžu spoločnosti?" vyplynulo, že 51% respondentov využíva vo svojom podniku marketingovú stratégiu na podporu pozitívneho imidžu spoločnosti. Naopak 37% podnikov nevyužíva marketingovú stratégiu na zvýšenie dobrého mena spoločnosti a 12% respondentov sa nevedelo k danej otázke vyjadriť.

Predpoklad „Viac ako 50% priemyselných podnikov na území Slovenskej republiky využíva svoju marketingovú stratégiu na tvorbu pozitívneho imidžu“ je potvrdený, vzhľadom na to, že 51% respondentov odpovedalo kladne na danú výskumnú otázku.

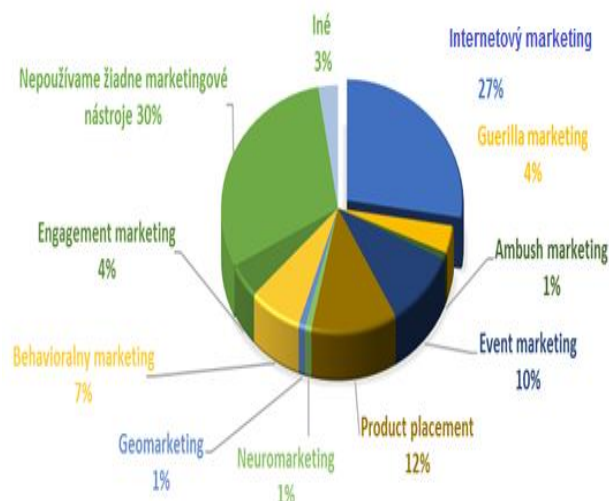


**Obr. 4** Odpovede na otázku: Využívate vo Vašom podniku marketingovú stratégiu pre podporu pozitívneho imidžu spoločnosti?, zdroj: vlastné spracovanie

Z odpovedí na výskumnú otázku (obr.5) „Aké marketingové nástroje využívate vo Vašom podniku v marketingovej komunikácii pre podporu pozitívneho imidžu spoločnosti?“ vyplýva, že 30% podnikov nevyužíva žiadne marketingové nástroje. Zvyšných 70% respondentov, využíva najmenej

jeden a viac marketingových nástrojov v marketingovej komunikácii. Medzi najviac používané marketingové nástroje patrí e-marketing, ktorý využíva 27% podnikov, potom product placement s 12%, event marketing s 10% a behaviorálny marketing so 7%. Zvyšné marketingové nástroje dosiahli zanedbateľné percento využitia podnikmi, ktoré sa zúčastnili dotazníkového prieskumu.

Predpoklad „Viac ako 50% priemyselných podnikov na území Slovenskej republiky nevyužíva nástroje internetového marketingu v marketingovej komunikácii na tvorbu pozitívneho imidžu spoločnosti.“ sa potvrdil, vzhľadom na to, že len 27% respondentov využíva nástroje internetového marketingu.



**Obr. 5** Odpovede na otázku: Aké marketingové nástroje využívate vo Vašom podniku v marketingovej komunikácii pre podporu pozitívneho imidžu spoločnosti?, zdroj: vlastné spracovanie

## OTÁZKY NA DISKUSIU

Postulát súčasnej doby dospieť do symbiózy „človek-príroda“ je v súčasnom marketingu vyjadrený v snahe implementovať uvedený prvok „udržateľnosti“ do jeho koncepcie. Ako však bolo uvedené, je to taktiež dôležitá súčasť formovania pozitívneho imidžu podniku, a teda aj jeho udržateľnej konkurencieschopnosti.

Udržateľný marketing predstavuje širokú škálu výziev a úloh, v čom spočíva jeho značná zložitosť a pri porovnaní so staršími koncepciami marketingového riadenia môže byť vidieť aj jeho náročnosť. Vzhľadom k tomu môžeme konštatovať, že medzi teoretickou a praktickou rovinou je aj v rámci tejto problematiky výrazná diferenciacia. Napriek tomu, že sa pojem udržateľnosti stáva bežnou súčasťou mnohých diškurzov na rôznych úrovniach, jeho implementácia do praxe nepredstavuje samozrejmosť.

Tento fakt môžeme vidieť aj vo výsledkoch nášho dotazníkového prieskumu v rámci ktorého sa nám potvrdili predpoklady, že viac ako 50% priemyselných podnikov na území Slovenskej republiky nemá stratégiu orientovanú na udržateľný rozvoj, a taktiež, že nemá svoju marketingovú stratégiu orientovanú na udržateľný rozvoj svojho podniku. Za pozitívny moment môžeme hodnotiť skutočnosť, že 84% podnikov, ktoré majú vybudovanú stratégiu svojho podniku, ju majú orientovanú na udržateľný rozvoj. Taktiež, napriek tomu, že len 44% podnikov využíva marketingovú stratégiu, 73% z týchto podnikov ju má orientovanú na udržateľný rozvoj. Môžeme vidieť, že pomerne veľké množstvo podnikov, ktoré využívajú stratégiu a marketingovú stratégiu, ich posúvajú do roviny udržateľnosti. V ďalšom štádiu nášho výskumu budeme nami stanovené predpoklady testovať.

Aj keď praktická aplikácia udržateľnej marketingovej stratégie v slovenskom prostredí priemyselných podnikov zostáva problematickou, nemôžeme to považovať za konečný stav. Dynamickosť, ktorá je charakteristická pre marketingový manažment 21. storočia necháva túto problematiku otvorenou pre nepretržité skúmanie.

## ZÁVER

Cieľom príspevku bolo poukázať na súčasnú situáciu vo využívaní udržateľnej marketingovej stratégie v priemyselných podnikov na území Slovenskej republiky.

Z výsledkov dotazníkového prieskumu vyplýva, že väčšina priemyselných podnikov na Slovensku nemá marketingovú stratégiu orientovanú na udržateľný rozvoj a nevyužíva nové trendy v marketingovej komunikácii pre posilnenie pozitívneho imidžu podniku dostatočne. Cieľom tohto článku bolo poskytnúť náš kritický pohľad na využitie udržateľnej marketingovej stratégie na zvýšenie konkurencieschopnosti priemyselných podnikov na území Slovenskej republiky a ich pozitívneho imidžu prostredníctvom využívania nových trendov v marketingovej komunikácii.

*Príspevok nadväzuje na výsledky projektov APVV č. LPP-0384-09: „Koncept HCS modelu 3E vs. koncept Corporate Social Responsibility (CSR).“, KEGA č. 037STU-4/2012 „Zavedenie predmetu „Udržateľné spoločensky zodpovedné podnikanie“ do študijného programu Priemyselné manažerstvo na II. stupni MTF STU Trnava.“ a VEGA č. 1/0448/13 „Transformácia ergonomického programu do štruktúry manažerstva podniku integráciou a využitím modulov QMS, EMS, HSMS.“*

*Príspevok je súčasťou podaného projektu KEGA č. 006STU-4/2017 „Inovácia štruktúry, obsahu a spôsobu výučby predmetu „Strategický manažment“*

*v kontexte nového modelu podnikania pre 21. storočie založeného na stratégii "výhra-výhra".“*

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