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There has been the twenty-first year of the Acta Scientiarum Polonorum. Oeconomia publishing. The Acta is the periodical including several thematic series with uniform graphics and similar format. The publication was set up by group of enthusiasts – employees of life sciences universities and has been published under the patronage of rectors of these universities. Constant involvement of academic society in increasing substantive and editorial level of the series, with efforts of the authors, the Programming Board and the Scientific Boards, has contributed to placing the Acta Scientiarum Polonorum (and our Oeconomia series) on the noticeable position in academic research society. Articles can be prepared in English with Polish title, abstract and keywords. Moreover, we publish latest issues in English only. The Scientific Board of the Oeconomia series, concerning the publication range, focuses its attention both on substantive content and precision of the form. The articles are revised in "double-blind review" process. Whole content of the Acta Scientiarum Polonorum. Oeconomia is available in electronic version on the following websites acta\_oeconomia.sggw.pl and www.oeconomia.acta-pol.net. We are glad to inform that Acta Scientiarum Polonorum Oeconomia are indexed within the AGRIS-FAO, EBSCO, SIGŻ, Copernicus Index, Central and Eastern European Online Library, AGRO, BazEkon, POL-index.

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> Yours sincerely Irena Ozimek Chairperson of the Scientific Board of the Acta Sci. Pol. Oeconomia series



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### THE IMPLICATIONS OF MANAGERIAL AND LEADERSHIP STYLES, AND ORGANIZATIONAL INNOVATION ON ORGANIZATIONAL CITIZENSHIP BEHAVIOR

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#### ABSTRACT

Aim: This study analyses the implications of organizational management, leadership and innovation variables in the enhancement of organizational citizenship behaviors. **Methods:** It departs from the assumption that management, motivation, commitment, leadership styles, innovation and other relevant factors affect organizational citizenship behaviors. **Results:** The method employed links the analysis, description and reflection based on the theoretical and empirical literature review. The analysis results on management and leadership styles express appreciation to their employees and promote organizational citizenship behaviors to create an atmosphere of motivation to organizational innovation. **Conclusions:** It is concluded that organizational management variables enhance the self-efficacy of organizational members and the effectiveness of the organizational citizenship behaviors. The work is original.

**Key words:** Leadership styles, motivation, organizational citizenship behaviors, organizational management variables

JEL codes: M14, O35, D23, D90, L20, D01

#### INTRODUCTION

Some variables enhance organizational citizenship behaviors in organizations. Organizations, in the scope of globalization, face many challenges in areas such as transformational leadership, organizational citizenship behaviors, motivation and the working environment [Cichorzewska and Rakowska, 2017]. Organizational citizenship behaviors increase the average level of organizational effectiveness by the enhancement and evaluation of their inducements for organizational members.

Organizational citizenship behavior, management capabilities and leadership styles are relevant for individuals in organizations by supporting organizational citizenship behaviors and providing organizational innovation and creativity, developing proposals, enhancing motivation and improving organizational performance. A sense of organizational responsibility in their contribution and participation towards the environment and society is linked to creating positive attitudes towards employers that are instrumental in strengthening relationships leading to the emergence of organizational citizenship behaviors.

Social exchange theory is limited to explaining the affective, cognitive and unconscious processes underlying the dynamic nature of organizational citizenship behavior. Relationships among the variables of ethical leadership, leader-member exchange and prosocial motivation are relevant to organizational citizenship behavior. Prosocial motivation is positively associated with organizational citizenship behavior [Kaplan et al., 2013]. Motivation in the work environment takes consideration of concerns and problems of communication aimed at improving organizational citizenship behavior. Work environment and personal predisposition are crucial elements for influencing organizational citizenship behaviors. Organizational support on organization citizenship behavior for environment, health and safety is mediated by perceived self-efficacy. Attitudes influence the adoption of organizational citizenship behavior environment, health and safety.

Organizational management and innovation support are predictors of organizational citizenship behavior. Supportive management theoretically improves organizational commitment and organizational citizenship behavior of workers. The permanent interaction between workers and management is related to supportive behaviors that foster organizational citizenship. Fatigue from organizational citizenship behavior depends on the perceived organizational support and team-members exchanges [Bolino et al., 2015]. When an organizational member perceives and experiences a positive influence, he or she returns the favor.

Positive relationships between managerial and leadership styles and organizational citizenship behavior through the mediation of employees' perceived organizational support and job satisfaction [Asgari et al., 2020] lead to efficiency in resource allocation and reduction of maintenance costs, provide the flexibility required to innovate in organizations.

This study is organized based on this assertion. It begins by analyzing the relationship of the managerial variables and continues with leadership styles leading to organizational innovation in their implications to organizational citizenship behavior.

#### MANAGERIAL VARIABLES IN THEIR RELATIONSHIP WITH ORGANIZATIONAL CITIZENSHIP BEHAVIOR

The instances and contexts of OCB as an ingratiation form of impression management practices of good actors. Organizations provide services to customers, with the quality of relationships between the workers and customers and other factors leading to organizational citizenship behaviors that become the main expressions in organizations because the contributions and challenges that ensure the improvement of management innovation. These behaviors can be explained by organizational, task and motivational characteristics.

Self-interest motives involve self-concern and impression management. Beliefs based on management and co-worker display other forms of OCB but caution OCB models of moderated and mediated causal structures [Masterson, 2011]. Perceived organizational support and social norms are considered predictors influenced by contextual factors. Organizational support and social norms have a mediation effect on organization citizenship behavior for the environment, health and safety.

Personal attitudes mediate between social norms and organizational citizenship behaviors related to environmental and health and safety issues. Practitioners require useful information on the factors determining organizational citizenship behavior to facilitate discussion perspectives concerning health, safety and environmental issues that occur in most organizations. Organizational citizenship behaviors for health, safety and the environment are related to general issues, climate change, regulations and the role of governments.

The antecedents and drivers of organizational citizenship behaviors for the environment, health, and safety (OCBHS) provide organizational management with knowledge and skills to support initiatives related to health, safety, and environment issues. Health, safe and environment attitudes, and personal self-efficacy are related organizational citizenship behaviors for health, environment and safety (OCBHES). Environmental awareness entails knowledge to protect natural environment with performing activities [Madsen and Ulhøi, 2001].

The workers' perception of supportive management demonstrates organizational commitment and organizational citizenship behaviors and organizational commitment. Perception of workers from organizational supportive management leads to demonstrating a response in terms of organizational citizenship behavior and organizational commitment. Organizational citizenship behaviors are mediated by work commitment [Salanova et al., 2011].

Prosocial motivation is related to organization citizenship behavior. Organizational citizenship behaviors are established through prosocial motivations. Organizational citizenship behaviors and prosocial motivation include behaviors displayed by organizational members that are not recognized by any award system with the objective to depose self-motivations and support others. Organizational members pro-socially motivated are engaged in organizational citizenship behavior. Prosocial motivation behavior has a positive relationship with organizational citizenship behavior. Prosocial motivated has a positive correlation with employee citizenship behavior, and an ethical leadership mediates the relationship with minimal impact.

Prosocial motivation is driven by persons that are emphatic with the needs of others which promotes a discretionary culture. Prosocial motivation has an impact on organizational citizenship behaviors and organizational commitment. The relationship between prosocial motivation and organizational citizenship behavior is supportive. Organizational citizenship behavior is related to prosocial motivation. Prosocial motivation is concerned with the contributions of organizational members to others of preferred resources [Hu and Liden, 2015]. The evidence supports the relationship between prosocial motivation and organizational citizenship behavior. Organizational citizenship behavior is an adaptive and purposeful process influenced by motivation and governance. Prosocial motivation has a positive effect on citizenship behavior and organizational commitment.

There is a strong negative correlation between public service motivation and untheatrical behavior [Gans-Morse et al., 2020]. There is no direct, meaningful relationship between prosocial motivation and the dependent variable organizational citizenship behavior. Organizational citizenship behavior in public administration attempts to determine factors improving the efficiency of organizational members.

Prosocial motivation has a positive relation to organizational citizenship behavior. Between prosocial motivation and the dependent variable of organizational citizenship behavior, there is no direct meaningful relationship despite the indirect impact evident through the construct. There is a relationship between prosocial motivation and organizational citizenship behavior. The association of prosocial motivation and organizational citizenship behaviors is positively related [Kaplan et al., 2013].

#### LEADERSHIP STYLES

Leadership has a crucial role in facilitating initiative-taking behaviors such as organizational citizenship behavior. Siswanto et al. [2022] analyze the effects of behavioral leadership styles on encouraging organizational innovation and individual creativity to acquire core competencies aimed at meeting the organizational performance. Ullah et al. [2021] investigate the role of leadership styles on organizational citizenship behavior for the environment, referring to organizational environmental practices not demanded, awarded and recognized by organizations and mediated by self-efficacy and psychological ownership. Organizational innovation and environmentally friendly behavior led employees that need to support organizational inclusive leadership to execute innovative behaviors. The interactions between inclusive leadership impact organizational citizenship behavior for the environment.

The different leadership styles are related to organizational citizenship behaviors such as attributional charismatic leadership, transformational leadership [Jiao et al., 2011] – shared leadership and developmental leadership. Transformational leadership behavior is related to organization citizenship behaviors. Alhashedi et al. [2021] investigate the mediating effect of organizational citizenship behavior in the relationship between transformational leadership behavior and organizational performance and the relationship between psychological ownership, working environment, employee involvement, incentives, employee motivation and organizational performance. Organizational performance incudes the dimension of organizational innovation.

The acceptance of leadership exhibits positive organizational behaviors and encourages. Organizational support theory explains the mediation effect of perceived organizational support (POS) on the relationship between ethical leadership and organizational citizenship behavior as well as the moderating effect of ethical dissimilarity [Tan et al., 2019]. Hanaysha et al. [2022] found that ethical and servant leadership styles have a significant positive effect on organizational citizenship behavior and employee creativity and that organizational citizenship behavior mediates the linkages between servant and ethical leadership styles and employee creativity.

The nature of ethical leaders plays a role in muddling effectiveness, reinforcing organizational citizenship behaviors and promoting ethical behaviors. The notion of organizational citizenship behavior is traced back to Katz [1964], who considered it to be a set of discretionary behaviors essential for organizational effectiveness. Organizational citizenship behavior of members is the relationship with organizational effectiveness in the workplace. Organizational citizenship behavior has an effective function in the working place where employees perform beyond the claim of duty.

Perceived self-efficacy partially mediates organizational support on organizational citizenship behavior for the environment, health and safety. The perceived self-efficacy has a positive relationship with the adoption of organizational citizenship behaviors for the environment, health, and safety. Organizational members helping colleagues beyond the accepted levels of punctuality and personal attendance aimed to attend higher levels of efficiency, productivity, customer satisfaction, etc. Organizational citizenship behavior facilitates employees in the tourism and hospitality industry to behave beyond the ethical role, encouraging the workers to become serious citizens and behave effectively in the organization.

Perceived organizational support is an antecedent of organizational citizenship behavior that have an impact related to the environment, health and safety and is mediated by perceived self-efficacy. Firms leverage this factor by selecting and hiring the right people with conscious attitudes towards specific objects and self-efficacy. Organizational citizenship behavior has some predictors in relation to health, safety and environmental issues in the organizational complexity of multinational enterprises and is related to perceived organizational support, self-efficacy, attitudes and social norms.

Perception of organizational support on organizational citizenship behavior is related to social exchange relationship and determined by the effect of perception of organizational support on self-efficacy. Citizen behaviors are influenced by a social exchange relationship development between organizational members.

Problems, opportunities and challenges confronted by organizational members in which organizational citizenship behavior is a predictor of organizational effectiveness. Research on organizational citizenship behavior has effects on organizational effectiveness through the lubrication of social machinery to increase resilience and flexibility through unforeseen contingencies. A process-oriented behavioral model focusing on the generative mechanisms and organizational contingencies was proposed by Argote and Greve [2007] that lies at the core of the behavioral perspective.

The leadership style has a mediating role in the relationship between prosocial motivation and organizational citizenship. Prosocial motivation of organizational members cast ethical leadership to moral agents, assist them in the execution of tasks and influence leadership [Yam et al., 2019].

#### **ORGANIZATIONAL INNOVATION**

Among other organizational-level variables that increase organizational innovation and organizational citizenship behavior is the cooperative culture, while organizational management support decreases them. Cooperative organizational culture is associated with innovative behavior and organizational citizenship behavior. The association of helping behavior in the workplace and organizational citizenship behaviors influence innovative behavior [Danaei and Iranbakhsh, 2016]. The innovative work of innovative behavior contributes to knowledge as part of organizational citizenship behavior.

Organizational citizenship behavior is a predictor that can influence the organization to become innovative and provides many benefits to employees in the hospitality industry. Organizational support is associated with innovative behavior and organizational citizenship behavior. Organizational factors support innovative behavior and organizational citizenship behaviors only explained by the perceived organizational behavior (POS) theory. Positive factors such as organizational support increase the innovative behavior and organizational citizenship behaviors.

Organizational support is a moderator of autonomy, role conflict and positive supportive management effects on organizational citizenship behavior and innovative behavior. Support of organizational autonomy provided to organizational members to improve their strength. Self-efficacy and other personal resources mediate the relationships between autonomy and organizational citizenship behaviors. Studies on innovative behavior and organizational citizenship behavior have been conducted in the public and private sectors that deal with research subjects and topics [Al-Hawari et al., 2019]. There is a positive influence of autonomy and supportive management in organizational citizenship behavior and innovative behavior.

Innovative behavior and organizational citizenship behavior are linked to entrepreneurial and rule-bending activities broadening the managerial vision to facilitate innovation behavior. Cooperative organizational culture facilitates the emergence of organizational citizenship behaviors and innovation behaviors which are influenced by the capacity of change management. Change management capacity is associated with innovative behavior and organizational citizenship behavior.

Public service motivation is associated with organizational citizenship behavior and innovative behaviors. The effect of public service motivation increases with the lack of organizational support. Public service motivation has a weakening effect on innovative behaviors and organizational citizenship behaviors when there is a lack of organizational support. Public service motivation increases innovative behavior and organizational citizenship behaviors. Circular purchasing is an innovative process that requires regulations, and facilitated by engagements in proactive and risk-taking behaviors, organizational support and resources. The support perceived by workers from organizational management leads to responses in terms of organizational citizenship behaviors and organizational commitment. Workers tend to perceive from organizational supportive management and respond in terms of organizational citizenship behaviors and organizational citizenship. The support perceived by workers from organizational management leads to responses in terms of organizational citizenship behaviors and organizational commitment. Workers perceive organizational management support as leading to a response on organizational citizenship behavior and organizational commitment.

Supportive management mediates relationships between prosocial motivation and organizational citizenship behaviors. Prosocial motivation has a positive relationship with organizational citizenship behavior mediated by managerial support. There is a positive relationship between prosocial motivation and organizational citizenship behavior mediated by supportive management. Prosocial motivation behavior has an impact on organizational citizenship behavior and organizational commitment coordinated with supportive management.

Prosocial motivation impacts organizational citizenship behavior and organizational commitment with a mediating role of managerial support. The relationship between prosocial motivation is positively related to organizational citizenship behavior mediated by management support [Kaplan et al., 2013]. Management support has a mediated role on the relationship between the prosocial motivation and organizational citizenship behavior. There is no direct relationship between prosocial motivation and the dependent variable organizational citizenship behavior as evidenced by the construct managerial support. Prosocial motivation has an impact on organizational citizenship behaviors and organizational commitment of workers mediating managerial support.

Workers involved in citizenship behavior respond to supportive organizational management. Workers supported by their management are motivated and pay back by demonstrating organizational commitment and organizational citizenship behaviors. The involvement of workers in organizational citizenship behavior responds to organizational managerial support. The involvement of employees must be achieved through formal roles and the development of organizational citizenship behavior. The workers who receive support from management are motivated and pay back by demonstrating organizational citizenship behaviors and organizational commitment.

Workers involved in citizenship behaviors responded to supportive organizational management to positively predict organizational citizenship behaviors. Workers supported by management are motivated to pay back by demonstrating organizational citizenship behaviors and organizational commitment. Workers involved in citizenship behavior respond to supportive management.

Management support is a predictor of organizational citizenship behavior. Management support motivates the workers who pay back the organization with organizational citizenship behaviors and organizational commitment. Involved workers responding to managerial support with predicted organizational citizenship behaviors positively. Organizational support management encourages prosocial motivation spurring organizational citizenship behavior. Managerial support is a mediator of the association between prosocial motivation and organizational citizenship behaviors. Prosocial motivation is associated to supportive behaviors by managerial and Organizational Citizenship Behavior. Managerial support is a mediator of the relationship between prosocial motivation and organizational citizenship behavior.

Prosocial motivation is associated with supportive managerial behaviors and organizational citizenship [van der Voet et al., 2017]. There is a relationship between managerial support and organizational citizenship behavior. Managerial support and organization citizenship behavior are variables related to organizational commitment. Managerial support is mediating the meaningful relationship between prosocial motivation and organizational citizenship behavior. Supportive management mediates the relationship between prosocial motivation and organizational citizenship behavior. The relationship between prosocial motivation is not directly significant as regards the independent variable organizational citizenship behavior, although this indirect impact of prosocial motivation is evidenced through the managerial support construct.

The indirect impact of prosocial motivation is checked through the construct of supportive management [Kaplan et al., 2013]. There is no direct relationship between prosocial motivation and the dependent variable organizational citizenship behavior, although the indirect impact of prosocial motivation is conducted through the construct of supportive management.

Non-explicit motives are responsible for demonstrating citizenship behavior through social values, organizational concerns and impression management. Managerial support mediates the relationship between prosocial motivation and organizational commitment and citizenship behavior. Supportive management mediates the association between prosocial motivation and organizational citizenship behaviors. Supportive management and prosocial motivation lead to organizational behaviors. Prosocial motivation exerts a positive influence on citizenship behavior in working environments.

Studies of public management on organizational innovation and organizational citizenship behavior are frequently less than in the private sector. Public service motivation in cross-level effect, with a lack of organizational support change management capacity, does not significantly affect organizational citizenship and innovation management but may have indirect effects with other factors.

Task characteristics and the level of motivation explain innovative behavior and organizational citizenship behaviors.

#### CONCLUSIONS

Management and leadership styles should express appreciation to their employees and promote organizational citizenship behaviors to create an atmosphere of motivation for organizational innovation.

The research contributions to the literature of organizational citizenship behavior must be evaluated considering the study limitations. A cooperative organizational culture nurtured and supported by workers is an imitative positively evaluated to improve the institutional support and extrinsic motivation towards innovative behavior and organizational citizenship behavior. Workers supported by organizational management are motivated to pay back in terms of organizational citizenship behavior and organizational commitment. Workers can exhibit organizational citizenship behavior if they have the appropriate motivational incentives. There is a strong positive correlation between organizational citizenship behavior and incentives.

Psychological ownership is closely linked to organizational citizenship behavior that cannot be separated. Psychological ownership is the state of mind that develops the feelings of belonging toward the target object, positively sharing and endeavoring for successful achievement. The sense of psychological ownership of an organization leads to organizational psychological attachment as the root of organizational citizenship behavior. There is a positive correlation between organizational citizenship behavior and organizational psychological ownership. Psychological ownership influences organizational citizenship behavior among workers.

A positive relationship between prosocial motivation and organizational citizenship behavior is mediated by supportive management. Prosocial motivation has an impact on organizational citizenship behaviors and organizational commitment. The relationship between prosocial motivation and organizational citizenship behavior is supported. The relationship between prosocial motivation and organizational citizenship behavior is mediated by supportive management. Prosocial motivation is positively associated with organizational citizenship behavior. Prosocial motivation has an impact on the workers' organizational citizenship behavior.

Management support has a mediating role between organizational citizenship behaviors and organizational commitment. Supportive management mediates the relationship between prosocial motivation and organizational citizenship behavior. Supportive management of operations enhances organizational commitment and organizational citizenship behavior.

The role of leadership styles should be studied in the future regarding the enhancement of organizational citizenship behavior for the environment. Cooperation between leadership and followers is critical for the achievement of organizational goals. The leader-member exchange with employee citizenship behavior. Prosocial behavior is a mechanism through which ethical leadership and leader-member exchange has its effects on organizational citizenship behavior. Voluntary practices of engaged leadership in organizational citizenship behaviors have implications for values, actions and behaviors of workers.

A complex process mechanism underlies a relationship between organizational citizenship behaviors and humble leadership. Humble leadership style characteristics in promoting organizational citizenship behavior has practical implications in learning more knowledge from training projects. More knowledge is needed about the boundaries of the relationship between humble leadership and organizational citizenship behavior. The complex process mechanisms underlie the relationship between humble leadership and organizational citizenship behaviors.

Organizational ethics and standards result in the practice of organizational citizenship behavior. Ethical leadership and leader-member exchange are sequentially mediators of associations among organizational citizenship behavior and prosocial behavior. Organizations give support to the members if the form of leadership and co-worker support; they respond reciprocally to the supervisors and co-workers. Organizational members involved in citizenship behaviors are ethically grateful to reciprocate and give back to the organization the quality leadership.

Future research on the mechanisms related to perceived organizational discretionary environmental behaviors in the relationship between spiritual leadership and organizational citizenship behavior for the environment. Future organizational environments may change the innovative behaviors and organizational citizenship behaviors as extra role behaviors.

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#### IMPLIKACJE ZMIENNYCH ZARZĄDCZYCH I PRZYWÓDCZYCH ORAZ INNOWACJI ORGANIZACYJNYCH DLA ZACHOWAŃ OBYWATELSKICH W ORGANIZACJI

#### STRESZCZENIE

**Cel:** Niniejsze badanie analizuje znaczenie zarządzania organizacją, przywództwa i innowacji dla wzmacniania zachowań obywatelskich w organizacji. Wychodzi od założenia, że zarządzanie, motywacja, zaangażowanie, style przywództwa, innowacyjność i inne zmienne istotne mają wpływ na zachowania obywatelskie organizacji. **Metody:** Zastosowana w pracy metoda badawcza łączy analizę, opis i dedukcję na podstawie przeglądu literatury teoretycznej i empirycznej. **Wyniki:** Wyniki analizy stylów zarządzania i przywództwa wyrażają uznanie dla swoich pracowników i promują zachowania obywatelskie organizacji w celu stworzenia atmosfery motywacji do innowacji organizacyjnych. **Wnioski:** Na podstawie wyników badania stwierdzono, że zmienne zarządzania organizacją zwiększają poczucie własnej skuteczności członków organizacji oraz efektywność organizacji zaangażowanej w organizacyjne zachowania obywatelskie.

**Słowa kluczowe:** style przywództwa, motywacja, zachowania obywatelskie w organizacji, zmienne zarządzania organizacją



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# CONDITIONS FOR THE DEVELOPMENT OF SOCIAL HOUSING IN UKRAINE

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#### ABSTRACT

Aim: The aim of the study was to determine the conditions, tools and mechanisms necessary for the state policy of Ukraine to provide Ukrainians with social housing during and after the war. **Methods:** The study used a set of scientific methods, including generalization, theoretical and methodological grouping, analysis and synthesis. **Results:** Based on the analysis of the solutions in Ukraine and selected European countries so far, the conceptual apparatus was generalized, and the features of social housing were defined. **Conclusions:** A list of entities entitled to social housing, sources and mechanisms of its financing and support programs were defined. Based on the obtained results, recommendations were presented for the policy of supporting social housing in Ukraine.

Key words: social housing, social vulnerability of the population, war, internally displaced persons

JEL code: I39

#### INTRODUCTION

The individual, their life and health, well-being and security are the highest social values of a democratic society. They are the key imperatives of sustainable development and security of the nation – its cohesion and lack of inequality, injustice, critical imbalances and imbalances in the formation and distribution of public goods, including the right to decent living. The problem of high social vulnerability, especially in terms of housing, had already been observed in Ukraine during the pre-war period. However, the full-scale war of the Russian Federation against Ukraine led to mass forced displacements both within the country and abroad, the destruction of buildings (since the beginning of the war destroyed 35.2 million m<sup>2</sup> of housing worth USD 31 billion [Ministry of Finance of

Ukraine, 2022]), as well as social housing and communal infrastructure (over USD 94.3 billion loss) - which objectively developed several social and humanitarian problems at the level of national security. No less threatening are the consequences of the war due to internal forced migration, which affected almost 20% of the population of Ukraine. It is already obvious that, together with the migration losses, the consequences of the war will lead to a large-scale demographic crisis - which naturally threatens the social and economic development of the state and its existence in general. The loss of human capital in Ukraine during the war results largely from exacerbating existing and intensifying new systemic social vulnerabilities in Ukraine as characteristics of the degree of development of self-satisfaction and realization of population rights due to limited resources or particularly difficult social

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conditions. Decreasing the availability of housing both in Ukraine and for Ukrainians abroad is one of the key problems of social vulnerability. The experience of many countries, including the experience of post-war reconstruction, shows that providing the population with social housing is an effective tool to overcome the problem of social vulnerability. Thus, the study aims to substantiate the basic provisions of the tools for providing social housing by the state policy to overcome the social vulnerability of the population of Ukraine during the war.

#### LITERATURE REVIEW

In the second half of the 20th century, in the era of neo-industrialization, it became clear that effective social policy is not less important than the economic one because it depends on the quality of labor – one of the leading factors of production. This understanding has intensified research in the field of social economy and social policy and, directly, in those aspects that are most problematic, including the lack of housing.

The lack of housing creates social injustice and leads to destructive processes in the social and economic system of the country, threatening its sustainable growth. That is why it has been the focus of numerous scientific discourses. Its theoretical and methodological principles are quite comprehensively disclosed by Marchesi and Tweed [2021], Sevka [2012], Komnatnyi [2021], Sudarenko [2010], Illiashenko, Illiashenko and Tovstuha [2021] and others. In the works by DeLuca and Rosen [2022], Vasyltsiv, Lupak, and Kunytska-Iliash [2019], Lupak and Kunytska-Iliash [2017], the issue of social housing was brought to the rank of social and even national security, which should be considered fair and relevant in the context of current events in Ukraine during the war. An important theoretical and applied basis for the formation and implementation of policies to provide socially vulnerable groups with social housing should be based on the best practices of state regulations in this area, including the relationship between the use of public social housing, overcoming poverty and even deviant behavior [Kim et al., 2022]. To address the demographic problems of territorial development [Chum et al., 2022], it should also be based on the results of the study of housing

policy models and developments in the analysis of the impact of social housing policy on socio-spatial [van Gent and Hochstenbach, 2020] and socio-demographic [Jones and Valero-Silva, 2021] consequences. In fact, based on the results of these and other studies, the scientific and applied principles of shaping and implementing housing policy have developed significantly, especially in terms of comprehensive housing support for low-income families [Cripps et al., 2020] and the inclusiveness of society [Elsinga et al., 2020]. Many existing developments relate to the state policy of social housing management and address the issue of social vulnerability of the population directly [Tako, 2022], including public housing [Zamzow, 2020] and housing in the system of municipal strategies of socio-economic development of cities [Granath Hansson, 2021]. However, due to the scope of the problem and its severity, providing the population with social housing during wartime requires additional research in this area both in terms of theoretical and methodological principles.

#### METHODOLOGY

The study applied a set of scientific methods of cognition, including generalization, theoretical and methodological grouping, analysis and synthesis. The methodological sequence of the study included: actualization of the problem of social housing in Ukraine as a country and its population during the war, generalization of conceptual provisions of social housing and classification of its types, synthesis of selected countries' experience in developing and implementing public policy of socially vulnerable segments of the population with social housing, defining the tools, methodology and the applied model of state policy to provide the population of Ukraine with social housing during the war [State Statistics Service of Ukraine, 2022].

#### RESULTS

The problem of providing housing for socially vulnerable, poor citizens is global and relevant even for the most developed countries because each country seeks to create favorable conditions for the life and

development of its citizens. In fact, the concept of social housing originated and evolved in close connection and interdependence with the social vulnerability of the population. Systematic policy requires not only introducing various mechanisms and instruments of regulation, but also defining all management elements - from basic theoretical and methodological provisions to purely practical aspects. Therefore, it is necessary to determine: (1) conceptual apparatus (to clarify the institutional and legal framework of policy) and structural characteristics of social housing; (2) a list of types of social housing; (3) sources and mechanisms of financing programs aimed at providing the population with social housing; (4) subjects of the right to social housing; (5) strategy and tactics of self-sufficiency and self-reproduction of the capital of the social housing system in the country.

According to Ukrainian regulations, the concept of social housing was introduced in 2006 by the Law of Ukraine 'On Social Housing', according to which social housing is the housing of all forms of ownership, provided free of charge to citizens of Ukraine in need of social protection and based on a fixed-term employment contract. The use of social housing is paid and consists of a fee paid directly by the employer and state aid. Social housing is not subject to rent, reservation, privatization, sale, gift, redemption or pledge. Actually, the origins of these provisions can be found in the instructions issued by the European Federation for Social and Housing in 1998. However, according to them, housing is social when distribution rules control the access to it and priority is given to households that have difficulty purchasing housing in the market.

Currently, in most EU housing codes, social housing is all housing used in accordance with the rules established by national regulations and categories of citizens and is provided to them with state, municipal or other support. The criteria for the right to appropriate support are not only the absence (restrictions) in housing, but also various economic, socio-cultural, historical and other aspects. At the same time, the following postulates prevail in world practice: social housing is temporary; it is not transferred to the property, is not sold, is provided to citizens for rent (use) without the right of a sublease, etc.; the amount of payment for the use of social housing is not high, it is a kind of social rent. However, these are not axioms, and there are many exceptions, hybrid approaches, etc. For example, in Spain, Greece and Cyprus, social housing is sold on a preferential basis for certain social categories of citizens. In the United Kingdom, Poland and Slovakia, there are programs to support the acquisition of home ownership by subsidizing part of mortgage payments. The United States provide government guarantees for mortgages. In Ukraine, housing from the social housing fund includes: apartments in multi-apartment residential buildings, manor (single-apartment) residential buildings, which are provided to citizens in the queue for social housing; living quarters in social dormitories, which are provided to citizens during their stay on the social housing register, provided that such housing is their only place of residence.

It is, in fact, designed to provide housing for certain categories (groups) of citizens who, due to various circumstances, cannot provide themselves with housing – at least per the minimum social living standards [Hsiao, 2021; Sheppard et al., 2022].

The severity of the problem and the level of attention to its solution is very relevant today for almost all European countries. However, this problem is critically acute for Ukraine (both for Ukrainians in the country and abroad) today because in the first month at the beginning of the invasion, 10% of its population left the country. At the end of May, the number of refugees exceeded 6.6 million. The UN estimates that it is the fastest migration crisis since World War II. Internal forced migration covered almost 20% of the population of Ukraine (according to various estimates, from 6.5 to 7.7 million people).

It should be noted that the Republic of Poland predominates in the provincial structure in terms of the number of refugees from Ukraine since the beginning of the war (over 50%), but the numbers of refugees accepted by Romania (14%), Hungary (9%), the Republic of Moldova (8%) and the Slovak Republic (6.4%) are also significant [van Gent and Hochstenbach, 2020]. These countries have provided the best possible support to Ukrainian refugees (90% of whom are women and children), including social support services and social housing. Thus, the Republic of Poland simplified the rules of entry into the country, provided access to healthcare, the labor market and

education. It provided a one-time payment of PLN 300 per adult and PLN 500 per child (with additional one-time financial assistance <PLN 700> within the UN program). In addition, in Poland, there are social benefits for various programs to help families with children, including assistance with the purchase of school supplies, as well as co-financing the fee for the child's stay in the nursery, children's club or guardian. Regarding social housing, individuals or organizations that provide housing and food to Ukrainians receive PLN 1,200 per month, but for no longer than 120 days. The Romanian government, together with civil society, has developed the Dopomoha platform, which facilitates asylum, housing and employment. In Germany, Ukrainian refugees have been given the right to choose between receiving the right to live in a special social hostel provided by social services and receiving material assistance (clothing, food, furniture) or financial support from the state – EUR 367 per month per adult and EUR 249 for children (for a child under 6 years old), EUR 326 for 6-17 years of age, EUR 294 for those under 25 years of age living with parents - which can be used for full or partial payment for housing. A special Wunderflats platform has also been created for Ukrainians looking for housing offered free of charge or at significant discounts. In addition, there is a possibility of receiving social housing, the cost of which is reimbursed by the state.

The problem of social housing existed in Ukraine even before the war. In 2014-2021 there was, on average, only 24.2 m<sup>2</sup> of housing per capita [State Statistics Service, 2022], while, according to UN minimum standards, one citizen should have at least 30 m<sup>2</sup> of living space. In Norway, the corresponding figure was 74.0 m<sup>2</sup> and, in Germany, 40.1 m<sup>2</sup>. The number of people on the housing register in Ukraine exceeded 600,000, while the number of families or single people who received housing each year was between 3,000 and 10,000. Even before the war, Ukraine had to put into operation about 280,000,000 m<sup>2</sup> of housing to eliminate the problem of housing. The social housing problem has intensified since the beginning of the Russian-Ukrainian war in 2014. Since then, the government has implemented a number of measures in this area and, currently, a full range of direct or indirect instruments to reduce the problem of homelessness for internally displaced persons. These are: (1) registration for temporary housing or social housing, and registration of internally displaced persons from among the participants in hostilities or persons with disabilities of group III on the apartment register for housing; (2) income tax rebate for the reporting tax year in the amount of actual expenses incurred for rent under the lease agreement (apartment, house); (3) preferential mortgage loans to internally displaced persons through a grant provided by the Reconstruction Credit Institution (KfW); (4) preferential credits for the purchase of housing through the payment by the state of 50% of its value for persons covered by the Law of Ukraine 'On Ensuring the Rights and Freedoms of Internally Displaced Persons'; (5) reduction in the cost of mortgage loans through the Fund for Entrepreneurship Development within the State Program' Affordable Loans' ('5–7–9%'); (6) registration of housing to improve housing conditions; support for individual housing construction in rural areas. However, the current active phase of hostilities and the large-scale invasion of Russia into Ukraine have led to a critical increase in the number of internally displaced persons and the destruction of housing. At the same time, the situation continues to worsen in accordance with the spread of hostilities in Ukraine. At present, the state is not able to adequately finance the problems of social housing for internally displaced persons. In early 2022, the country's legislation was amended to provide: payment of monetary compensation only in commissioned housing, excluding the primary and secondary markets, as it was before; receiving monetary compensation for beneficiaries who experienced hostilities (only until June 1, 2018); strengthening control over the presence/absence of ownership of housing as well as information provided in the application for monetary compensation; checks for the existence of facts of financing of social housing at the same time from state and other sources.

Despite the complexity of the implementation of social protection policy during the war, the duty of the state is to support internally displaced persons within Ukraine, especially by providing housing due to the loss or severe damage of previous places of residence, to prevent a humanitarian catastrophe, stabilize social tensions and the socio-economic situation of the hosting territories. Thus, Ukraine - in the conditions of war - faces many challenges concerning social housing: 1) constant monitoring of the level and quality of social housing provided to refugees -Ukrainian citizens abroad, ensuring the preservation and protection of their social and labor rights; 2) the provision of social housing to persons returning from abroad who do not have housing or a need significant improvement in living conditions in Ukraine; 3) the provision of social housing or the improvement of living conditions for internally displaced persons who have lost their homes or cannot return to their places of residence due to hostilities; 4) proper implementation of the policy of social protection and support (in particular, in the field of social housing) of socially vulnerable categories of the population in general.

Consequently, this problem is increasingly gaining systemic status and, in the conditions of war, critical to ensure Ukraine's social and humanitarian component of national security. Due to resource and budgetary constraints, Ukrainian potential for its elimination is continuously decreasing. Still, such a dilemma leads to the application, firstly, of a system approach; secondly, the most rational and effective world practices; thirdly, building policy based on principles and using instruments specific to the modern social and humanitarian policy of the EU countries to converge the relevant environments and contribute to the acceleration of Ukraine's membership in the EU.

European countries apply different mechanisms of financing social housing. Firstly, these are the direct budget expenditures for the construction of social housing. EU countries allocate significant resources from the state and local budgets for this purpose. For example, in France, it is 1.9% of GDP, in Finland, Denmark and Austria, between 1.2 and 1.4% of GDP and, in Italy, 0.3% [Tako, 2022]. Secondly, it is the obligation of developers to give part of the living space in new buildings to provide housing for low-income citizens. This practice is typical of Britain and France. Thirdly, it is a mixed option (e.g., in the Netherlands); social housing of 80–95 m<sup>2</sup> is built mainly in cities and provided to students and immigrants. Mixed equity participation involves raising funds from the central government, the local community, businesses, residents and others. Their reasons to invest in such

projects are different: the government and the community are interested in solving social problems – in particular, the vulnerability of the population; businesses can obtain commercial space in newly built neighborhoods; other individuals and legal entities can invest in municipal or government bonds or in socially responsible civic behavior (donations).

The fourth mechanism is mortgage lending on concessional terms and so-called "housing construction savings". The advantages of this option are a lesser burden on budgets and the transfer of activities to provide housing from the state to the citizens themselves. At the same time, the development of the financial and credit system of the country (region), the construction sector, the insurance sector, etc. are stimulated. This path is very promising for today's Ukraine given the limited budget resources and the need to solve problems in all sectors of the national economy. At the same time, financial resources and guarantees of risk minimization can be relied on by international economic organizations. The fifth mechanism is the use of various public-private partnership instruments in the housing sector.

The sixth mechanism is full or partial subsidization (compensation) of the cost of construction and repair (up to 70%) and rental housing for socially vulnerable groups. This practice is widespread in Austria, Great Britain, Germany, France, Denmark, Sweden and other European countries. In fact, this tool is currently largely used for Ukrainian refugees living abroad and has every logical basis for the period while hostilities continue in the territory of residence of Ukrainians.

Programming is another important tool for managing social housing policy. In most developed countries, social housing is formed and used according to specially adopted national and regional programs. The advantages of this approach are systematic and coordinated activities; the long-term nature of the policy; the ability to program and reconcile resources and regulatory outcomes, etc. Italy is implementing the Housing Plan program, which provides for the construction of 100,000 new social apartments for young families, the elderly, people in difficult economic situations, students and low-income immigrants who have been in the country for at least ten years. The subjects of legal relations concerning the formation and use of social housing according to the Law of Ukraine 'On Social Housing' are citizens of Ukraine who, in accordance with the law, are recognized as in need of social protection and have the right to receive social housing; executive bodies; local governments; legal entities and individuals. Local self-governments finance social housing from their local budgets and other sources of funding. They manage social housing, control the use of social housing, set fees for its use, keep records and monitor.

In the 1970s and 1980s, Sweden implemented the program 'Million', which resulted in the construction of one million so-called "apartments – good social housing". It provided a range of incentives for a large number of socially useful construction companies, causing the development of socially responsible entrepreneurship, creating many new jobs, intensifying construction-related industries and economic activities, expanding the social housing bank, etc. In most European countries, special authorized institutions are created to implement social housing policy at the regional or local level with the functions and tasks of accounting for socially vulnerable (housing) citizens, social housing and attracting funding.

At the same time, attention should be paid to the high level of public control over the functioning of the social housing system, which may become relevant for Ukraine as a country characterized by corruption and irrational – often inappropriate – use of public resources. The introduction of the best practices will serve as a reliable safeguard for their return and possible spread while activating the tools of social housing in the practice of post-war reconstruction of Ukraine. It is said that in many countries (e.g., Austria, Denmark, the Netherlands, Finland, Germany, Latvia, Estonia, Luxembourg), specialized government agencies and independent public associations, developers' associations and other private organizations, together with opportunities, are crucial for the policy in this area.

In Ukraine, the following groups have the right to be registered for social housing: those for whom such housing is the only place of residence or who have the right to improve housing conditions; those whose average total monthly income for the previous year per capita is lower than the value of the indirect cost of renting housing in the village and the subsistence level established by law; internally displaced persons who do not have other housing to live in the territory controlled by the Ukrainian government or whose housing has been destroyed or damaged to a state unfit for habitation.

In Germany, social housing is intended exclusively for the poorest and largest families as well as single parents. In France, vulnerable people include young families, single mothers, single people, people with disabilities and the elderly. According to world experience, it is strategically important not only to eliminate the problem of available and affordable housing for socially vulnerable groups, but also to create a quality motivation system for individuals so that they can get out of a high level of dependence on social housing and social support.

Regarding the institutional and organizational basis for the creation and provision of social housing in Ukraine, we can agree with researchers [Jones and Valero-Silva, 2021] who believe that a special new model - developed taking into account selected best practices and Ukraine's conditions in terms of war and mentality - established relations in the coordinate system 'power - developers - citizens', internal institutional and legal support of housing, etc. The model needs to eliminate potential threats of corruption, the shadow sphere employment and income, housing turnover, etc. Therefore, a promising model should ensure the accumulation of profits in a public institution that will be the operator of the relevant social service or allow such an operator (another authorized structure) to remain the owner of social housing, leasing it to relevant socially vulnerable persons. For this purpose, asset management companies that manage mutual funds may be involved by using forward contracts under which the primary asset is property rights to non-existent social housing.

#### RECOMMENDATIONS

According to the results of the analysis of other countries' experience in the formation and implementation of state policy for providing socially vulnerable groups with the necessary social housing (and, thus, solving a wide range of social inequality and taking into account the condition of today's Ukraine), there are grounds for determining the following fundamental components of public policy in this area (Fig. 1).

The steps that Ukraine must take to adapt its social and housing policy to realities, including the consequences of the war and further post-war reconstruction, include: (1) a revision in accordance with new conditions and realities and approval of minimum social housing standards; (2) the introduction of subsidies to cover part of the payment for the rent of premises in the housing stock for commercial use, as well as subsidies for the operation, construction and purchase of housing; (3) the construction and sale of affordable and social housing through networks of operators (housing associations) that would receive directly budget funds allocated under housing policy, as well as had opportunity to attract funds from private investors (including individuals); (4) the introduction of a set of tax incentives for, firstly, construction and repair organizations focused on intensifying the construction and restoration of destroyed (damaged) housing stock in the regions of the country; secondly, the population and the subjects of the financial and credit sphere to stimulate relations in terms of mortgage lending for housing construction, tax incentives for investment in the housing sector, preferential interest rates, etc.; (5) intensification of the policy of stimulating housing construction by enterprises and providing part of it to employees on social terms.

#### CONCLUSIONS

The right to housing belongs to the group of economic, social and cultural human rights and freedoms, and the issues of housing for citizens are constantly the focus

Essential and semantic principles	Social housing is a tool for solving the problem of providing the population with housing with the involvement of the general housing stock of the country and abroad, provided to clearly defined recipients for preferential use or ownership to address social vulnerability and inequality in society in terms of access to housing.
Institutional and legal basis	Constitution and Housing Code of the country; special law on social housing and developed general legislation in the field of housing law and relations; international agreements on housing and the protection of social and housing rights of citizens abroad; national and regional programs to provide the population with social housing; specialized social housing programs for various socially vulnerable groups.
Institutional and organizational structure	Coordinating body in the system of the central executive system of power and its structural subdivisions in the regions of the country; branch business associations (construction, financial and insurance activities; real estate transactions; professional services); system of public organizations specializing in the areas of housing relations and social services; institutional and organizational platforms of communication and cross-control.
Range of services	Preferential use, rental housing, dormitory, shelter; subsidies, reimbursement of the cost or part of the cost of purchasing housing; reimbursement of part of the costs associated with the use and/or purchase of housing (mortgage security and interest, insurance, reconstruction, repair, etc.).
Recipients	Forcibly displaced persons; citizens without housing or with unsatisfactory housing conditions and incomes lower than the cost of rent; citizens who have the right to a dormitory; socially vulnerable categories of the population.
Financing mechanisms	Construction under guarantees and loans of international financial and economic organizations; mixed public-private equity investment; mortgage lending on concessional terms; state subsidies for construction and repair; public-private partnership.



Source: compiled by the authors.

of attention of the UN, the European Parliament, the European Commission and the Council of Europe. Accordingly, every democratic state that is socially responsible must take all possible measures to meet the natural rights of citizens to housing and prevent inequalities in society. The importance of implementing these constitutional tasks was growing before and has been growing during the war, when millions of people lost their homes, were forced to move to other parts of the country and even abroad, were deprived of employment, income and other opportunities for self-sufficiency. Based on the review of European experience in the formation and implementation of social housing policy, it is advisable to determine the principles of social housing in the context of state policy to overcome the social vulnerability of Ukraine during the war. Specific conditions both in Ukraine in general and in the war environment - in particular, with the use of limited available resources and European best practices - require the formation of a clear model of public policy in this area, comprising substantive principles, institutional and legal framework, institutional and organizational structure, range of services, list of recipients and mechanisms for financing programs. The leading place in this system is given to financing mechanisms - the key of which should be international cooperation between Ukraine and the EU in the field of social housing, construction under guarantees and loans of international financial and economic organizations, mixed public-private equity investments, mortgage lending principles, state subsidies for construction and repair, as well as public-private partnership.

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#### UWARUNKOWANIA ROZWOJU MIESZKALNICTWA SOCJALNEGO W UKRAINIE

#### STRESZCZENIE

**Cel:** Celem pracy było określenie uwarunkowań, narzędzi i mechanizmów niezbędnych dla zapewnienia Ukraińcom mieszkań socjalnych w czasie wojny i po jej zakończeniu w ramach polityki społecznej państwa. **Metody:** W opracowaniu wykorzystano zestaw metod naukowych, w tym uogólnienie, grupowanie teore-tyczne i metodologiczne, analizę i syntezę. **Wyniki:** Na podstawie analizy rozwiązań w wybranych krajach europejskich uogólniono aparat pojęciowy i zdefiniowano cechy mieszkalnictwa socjalnego, określono listę podmiotów uprawionych do mieszkalnictwa socjalnego, źródła i mechanizmy jego finansowania oraz programy wsparcia. **Wnioski:** Na podstawie uzyskanych wyników przedstawiono rekomendacje dla polityki wsparcia mieszkalnictwa socjalnego w Ukrainie.

Słowa kluczowe: mieszkalnictwo socjalne, wrażliwość społeczna ludności, wojna, osoby przesiedlone



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# MARKETING FACTORS OF THE TOURISM MARKET'S OPERATIONS IN UKRAINE

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#### ABSTRACT

**Aim:** The article is devoted to analyzing marketing factors of the tourism market operations in Ukraine under martial law. **Methods:** The study used the method of secondary data analysis. **Results:** The authors determined that the tourism market always reacts very sensitively to crisis events (pandemics, devastating natural disasters, political or military crises, etc.) and highlighted the changed format of the tourist market in Ukraine in the conditions of the protracted Russian-Ukrainian war. The authors identified the main factors of the current market of tourist services in Ukraine under martial law conditions. The functioning of the tourism market during the war is strategically important for the state and citizens. **Conclusions:** The authors summarized the experience of the tourism sector of countries that have been through a similar crisis and became leaders in the regional markets of tourist services to implement it in Ukraine effectively and determined the main factors of the functioning of the market of tourist services in the segments of domestic and inbound tourism after the victorious peace and innovative directions of recovery and further development.

**Key words:** tourism, tourism market, marketing factors, martial law, Ukraine **JEL codes:** Z3, D4, D9

#### INTRODUCTION

Like the rest of the world, the tourism industry in Ukraine experienced difficult times and suffered huge losses in 2020 and 2021 due to the COVID-19 pandemic. All tourism market players' marketing plans were directed towards 2022 as restrictions related to the pandemic began to ease and many preconditions indicated that the industry would recover, given its importance to the economy of many countries. Russia's full-scale military invasion of Ukraine on February 24, 2022, became a new test for the global and domestic tourism industries. Because of it, all tour operators were forced to suspend their operations in the territory of our country temporarily. Since the closure of Ukraine's airspace, it has become impossible to carry out air passenger transportation. The tourism industry of Ukraine has lost billions of hryvnias since the beginning of the full-scale war with Russia. Instead of the 'season of earnings', there has been a 'season of losses'.

Obviously, the human toll of war and the humanitarian crisis are the most important but, at the same time, the impact of military conflict on the tourism sector of the economy cannot be ignored. Market research shows that the tourism industry of European countries will undergo significant changes in 2022 since Ukraine and Russia provided a significant share of European tourist flows. In Europe, the tourism industry accounts for

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about 10% of the GDP, providing 23 million jobs. The sanctions that Europe imposed on Russia because of the war in Ukraine also affect the European economy, primarily in the fields of tourism and air transport, and not only in the locomotive of the European economy -Germany [Kuklina, et al., 2022]. According to forecasts from Euromonitor International, a decrease in the number of tourists from Ukraine and Russia will lead to a shortfall of almost USD 7 billion in the tourism industry of European countries in 2022 [Trout, 2022]. The Association of European Travel Agents' and Tour Operators' Association [2022] (ECTAA) have confirmed that the war started by Russia [against Ukraine] significantly affected the number of bookings by European tourists precisely because of a "lack of security". In addition to the issue of security, the decrease in the number of reservations is influenced by the higher cost of tourist trips due to increased energy and food prices [ECTAA, 2022]. Preliminary calculations by ECTAA experts indicate that the cost of travelling around Europe in this year's tourist season has increased by an average of 5–10%. Taking into account all the current challenges the Ukrainian tourism business is facing, it's important to research how it operates in crisis situations and determine the prospects in the post-war period.

#### MATERIALS AND METHODS

The purpose of the article is to assess the conditions and analyze the marketing factors of the tourism market operations in Ukraine in the state of war and post-war. Current operations and the prospects of the tourism market have always been at the center of attention and have been studied in many scientific works. The full-scale Russian-Ukrainian war led to new directions in scientific research. In particular, the authors Sak, Bilyo, and Tkachuk analyzed the ecological and economic consequences of the Russian-Ukrainian war [Sak et al., 2022]. In the research of Pankiv, the author investigates the behavior of different players in the tourist market at all stages of the military crisis. [Pankiv, 2022]. Scientists Roik and Nedzvetska studied the activity of the tourism industry in the economic policy of Ukraine under martial law [Roik et al., 2022]. Currently, the topic of the development of the tourism market in Ukraine under martial law is being actively studied by both Ukrainian and foreign experts, including researchers from the Kyiv School of Economics [2022]. Together with the Office of the President, the Ministry of Economy of Ukraine and the Ukrainian Cultural Fund [The Ukrainian Cultural Foundation, 2022], they are implementing the project 'Russia will pay'.

In the process of preparing the article, both general scientific and special research methods were used: monographic (to identify the factors and possibilities of tourist businesses operations under martial law); historical (to study the role and importance of tourism in the economy of different countries); economic analysis and modelling (to determine exogenous and endogenous factors influencing the activities of both tourist operators and the market in general); factor analysis (to determine the set of factors affecting the tourist services market); statistical analysis and expert evaluations (to assess the condition of the tourist services market and to analyze possible options of services that tourist business can offer to satisfy different customer categories under martial law). For theoretical generalizations, conclusions and substantiation of directions of tourism market operations in Ukraine in the state of war and post-war, the authors used the abstract method, methods of system analysis and the system approach.

The methodology of the research on the tourism market in Ukraine under martial law is based on the essence of tourism as a systemic social phenomenon with its specifics, such as multicomponentity, structuredness, loose hierarchy and polyfunctionality. The applied technique reflects the complexity and multifaceted nature of the current operations of the tourism market both in the international and domestic segments.

For the scientific results of Ukrainian and foreign authors on the operations of the tourist services market and statistical data of the State Tourism Development Agency of Ukraine, the author's market research (observations) served as the empirical and factual basis of the research.

#### **RESULTS AND DISCUSSION**

The protracted full-scale Russian-Ukrainian war is reflected in all sectors of the economy and social life in Ukraine. One of the business areas that suffered the most during the war is tourism, which functions comprehensively in international and domestic aspects. In the initial shock of the first months of the war, travel companies could not organize tours, and travel reports simply became irrelevant. It should be noted that the tourism market always reacts very sensitively to all possible world events – pandemics, devastating natural disasters, political or military crises, etc. In January 2022, many governments of different countries had already announced warnings about trips to Ukraine, which was the first signal of an unfavorable situation in the tourist season of 2022.

Since the beginning of the war, some tourist companies have closed, and others have reoriented their activities to volunteering (they used transport to evacuate refugees, involved partnerships to organize the purchase of humanitarian aid from abroad, etc.), thinking about the full recovery of the main activity. In the secondary sources of marketing information, we find many examples that demonstrate how important the tourism industry is – not only in peacetime to promote Ukraine to domestic and foreign tourists, but also in wartime – to help those in need in many ways. For example, with the start of the war, many travel companies immediately turned their offices into volunteer headquarters, sending uniforms, food and medicine to the frontline.

It's a paradox, but the market conditions for tourist services in Ukraine in the first months of the Russian-Ukrainian war were unusually high. This is explained by the fact that a large flow of people who had the financial capacity and were escaping from the war from the eastern, central and southern regions to western Ukraine required accommodation. Under these circumstances, the tourist tax increased significantly in many regions. The following cities and regions transferred the most funds from tourist tax to the budget for the first four months of 2022:

- Kyiv more than UAH 18 million 98% more than last year;
- The Lviv region UAH 11 million 463 thousand 268% more than last year;
- The Transcarpathian region UAH 6 million 212 thousand 144% more than in 2021;
- The Khmelnytskyi region UAH 1 million 447 thousand growth by 65%;

• The Ivano-Frankivsk region – almost UAH 6 million – 48% more than the previous year.

According to the State Tourism Development Agency (STDA) statistics, the country's budget received almost UAH 65 million from tourist tax in the first four months of 2022 [2022]. This is 65% more than last year during this period. But already by June–July 2022, the conditions of the tourism market were not so favorable as the occupancy of hotels decreased to 30-40%. In order to increase the occupancy of hotels and resorts in Western regions of the country, the STDA is developing special rehabilitation programs for both military personnel and civilians who suffered from military actions. This will support Ukraine's tourism industry, save jobs and provide the necessary health care to military personnel and civilians. A significant drop in tourist tax has been recorded in areas where hostilities have been or are currently being conducted, as well as in those that have been occupied. Thus, a significant decrease in the tourist tax was recorded in Mykolaiv (63%), Luhansk (60%), Sumy (48%), Kherson (46%) and the Zaporizhzhia regions (41%) [Majumdar, 2022].

Marketing studies show that, under the conditions of the protracted Russian-Ukrainian war, the tourist market in Ukraine began to resume its activity and, even in a very modified format, satisfies existing consumer demand and continues to operate. The Lviv region is one of the relatively safest areas for life and recreation during the war, so tourism workers are currently developing new and improving existing routes for active hiking and cycling tourism, ensuring the functioning of European-style campsites and recreation centers. Since the beginning of 2022, there has been an upward trend in the number of tourists: in the first half of 2022, the tourist tax in the Lviv region amounted to UAH 19 million 774 thousand, while in the same period of 2021 (COVID-19) year it was only UAH 6 million 756 thousand. For comparison: in prewar and pre-COVID 2019, the tourist tax for the first half of the year in the Lviv region amounted to UAH 7 million 743 thousand [Rodak, 2022]. For the six months of 2022, the amount of tourist tax in the Ivano-Frankivsk region amounted to UAH 9

million, which is almost 90% of the annual figure of the last year. According to the results of 2022, higher indicators of the tourist tax are expected due to the winter tourist season because it is difficult to count on the summer season [Suspilne.media, 2022].

It is extremely important that the Russian-Ukrainian war did not destroy the entire tourist business. Market research shows that domestic tourism is slowly recovering, although it is still very limited. Tour operators specializing in domestic travel have resumed their activities by 20–50% as of July 2022 compared to last year.

Currently, millions of internally displaced persons, forced to leave their homes due to a threat to their lives, are located mainly in the west and partly in the center of Ukraine. And the best local guides organize charitable free familiarization tours for such forcibly temporarily displaced persons. Currently, the psychological state of Ukrainians, especially those far from home, is difficult. Many people need help and participation in excursions accompanied by a professional tour guide is one of the types of psychological reload. Thanks to such excursions, internally displaced persons better understand the locals of the region where they have moved. This allows them to feel more comfortable and get rid of panic fear due to preconceived notions. In addition, a distraction from negative thoughts helps to restore the mental state and fight depressive moods. Local Telegram and Viber channels, as well as social media, are used as marketing channels for the promotion of excursion activities, where they give information about the time and programs of excursion events in more detail [VisitUkraine.today, 2022].

Most of the excursions deliberately include a historical component to better explain to people the difficult periods that, for example, Galicia went through during the communist takeover. For example, tour guides talk about atrocities in 1939–1941, which were repeated this year in Bucha, Irpen, Mariupol, Kharkiv and other occupied cities and villages. The popularization of Ukrainian history should become a trend in the country's tourism industry both now and in the future. Independent Ukraine never participated in armed conflicts on other territories as an aggressor, but only defended itself. Today, it protects the whole of Europe. Ukrainians give their lives not only for the protection of their own territory, but physically protect what the entire developed world professes spiritually.

The vacations' specifics of domestic tourists have also changed, and their duration does not exceed one week. Tourists do not consider this like vacations or holidays, but mostly like a "reboot", which helps to regain strength and return to work again, to work for aid and to donate to the armed forces. Shortterm and seasonal trips to national preservation parks, as well as places that help to better understand history, are in demand both among IDPs and locals. For example, three-day tours to the Ternopil region or Podillia, climbing Hoverla, one-day tours to Pereyaslav or Kanev and seasonal so-called "lavender tours" (in the Lviv region, there are only five different lavender locations). Hiking to the mountain peaks of Parashka and Pikuy, Kamianka waterfall, trips to the Tustan fortress, to Zvenyhorod with its interactive tour in VR glasses, to Zhovkva, the castles of the "Golden Horseshoe" - Oleskyi, Pidhoretskyi and Zolochivskyi are very popular. There is also a demand for trips to places of military glory of Ukrainians - in particular, to Chernihiv, Bucha and Irpen. In Lviv, tourists often visit the Heroes of the Heavenly Hundred memorial.

Ecotourism remains popular among Ukrainians, particularly in the west, because tourists need to be close to nature. Gastro locations in Ukraine operate in regions where there are no hostilities but, at the same time, neither food festivals nor entertainment festivals are held. What is important is that part of the profits from thematic gastro-excursions (snail farms, banana farms, cheese and wine tours, etc.) are transferred by the travel companies to support the armed forces of Ukraine. Even during the war, some travel agencies offer extreme sports: rock climbing, hiking and rafting. The STDA developed safety regulations for the travel business during the war.

In this difficult season, Lviv tour operators also offered several new tourist locations – Turkivsky quarry, Trinyg rock in the Voronyak mountains, interactive entertainment in Havarechchyna, the Lazniy waterfall, the water park in Staraya Sola and the "Mshanetski huts". To engage tourists in Lviv, they plan to organize trips on paddle boards on the city's lakes (SUP boarding <stand up paddle boarding> is one of the types of surfing where a board is equipped with an oar. You can ride a paddle boat while standing, kneeling or sitting). The experience gained by Lviv in the market of tourist services in wartime allows not only to transferring it to other cities (Kharkiv, Chernihiv, Odesa, Sumy – cities that hold on and fight for freedom), but also to creating qualitatively new tourist services. We predict that Lviv will become the "entrance gate of the state" when Ukraine wins the war.

With the onset of summer and the need to improve children's health, the market for holiday tours abroad is also starting to become more active. Ukrainian tourists have the opportunity to fly to the sea coasts from neighboring Poland as some Ukrainian travel agencies now cooperate with the popular Polish tour operator Rainbow Tours, which specializes in tourist trips to Turkey, Egypt and other popular holiday destinations. The same holiday tours are organized from Lithuania and Moldova as the Ukrainian tour operator JoinUp is present in these countries. Considering that tourists do not go to the Black Sea and Shatsk for safety reasons and that sea vacations abroad are either logistically difficult or not affordable, we recorded an increased demand for vacations near the thermal waters of Transcarpathia for swimming in rivers and lakes.

Thus, we can say that under martial law, travel acts primarily as a mental relief – an effective way to recover from the experienced stress and accumulate strength to continue the fight for victory. In addition, by spending holidays in Ukraine, tourists contribute to the improvement of the economic situation in the country.

The situation of the domestic tourism market is complicated by a number of exogenous factors. Taking into account the almost two-fold increase in the cost of fuel, the cost of transportation has increased significantly, which has impacted the cost of tours and excursions accordingly. According to our survey, tour operators have raised prices by 10-20% because they realize that tourists have not become richer and a many people are not ready to spend money on tourist services. As for inbound tourism, it is practically non-existent in Ukraine under martial law. Instead, there are foreign journalists, volunteers and representatives of international organizations in Ukraine, and Ukrainian tour operators provide them with certain services for entering the country and settling in hotels. Communication with international journalists, volunteers and opinion leaders is very important because they form an impression about Ukraine. After our victory in the Russian-Ukrainian war, they will be the first to want to come to Ukraine again.

A new trend was formed in the tourist market of Ukraine when, despite the absence of inbound tourism, Lviv again became a tourist hub due to the termination of air traffic. Tourists who want to go abroad go to Lviv to transfer to tourist buses and travel around Europe. This also applies to trips to the seaside, pilgrimages and excursion tours. It is demonstrative that requests for "tours without Russians", which were in trend in previous years, are now much more in demand. Many countries have stopped issuing visas to Russians. Tour operators recommend travelling to Europe to avoid unwanted meetings, where, unlike Turkey, Egypt, the Arab Emirates, Sri Lanka, and Thailand, Russians are considered unwanted guests. The Airbnb service does not allow Russians to book accommodation on their platform, which means that people renting apartments do not host Russians there because they are not sure that there are no assassins from Bucha or executioners from Mariupol among them.

A large number of Lviv carriers are involved in outbound tourism, but this market situation is temporary due to the suspension of air flights – especially low-cost ones, which are in greater demand among tourists. Thus, market research allows us to state that radical changes have taken place in the domestic tourism segment of Ukraine as Ukrainians have a new appreciation not only of domestic mountains, rivers and lakes, but also of the country's history.

What tourism is possible during the war? This is a logical question in the context of current events in Ukraine. But tourism industry experts appeal, with the examples of Israel, Croatia, Georgia and other countries where the revival and formation of the tourism industry began either during military operations

or immediately after their end. The experience of the tourism sector of countries that experienced a similar crisis situation shows that after the war, the indicators of the tourism market have an upward trend. For example, the war of independence in Croatia lasted from 1991 to 1995. The country fought against the aggression of the united Great Serbian forces - Serbian extremists in Croatia, the allied Yugoslav People's Army and Serbia and Montenegro. During the war, tourism in Croatia practically stopped but, in the early 2000s, having a strong recreational, health and cultural potential on its territory, Croatia began to strongly support airlines and cruise services, created favorable conditions for homeowners, ensured the opening of beaches, equipped them with appropriate infrastructure and financed the promotion of national tourist resources. Informational tourist campaigns are still conducted both centrally and by local tourist authorities. Almost ten million tourists annually bring substantial income and generate about 15% of the country's GDP. According to the Croatian Bureau of Statistics, before the coronavirus pandemic, the country's income from tourism grew by 11% annually [Honcharova, 2022].

A good example is also Israel, where the share of tourism in the economy is 6.2%. The most popular types of tourism in this country are pilgrimage, medical and cultural. In 2019, 4.5 million tourists visited Israel; meanwhile, the country is at war with Palestine. In 2020, due to the COVID-19 pandemic, this number dropped by 81%. The Israeli-Palestinian conflict over disputed territories has been going on for decades. In 1947, the UN voted to divide Palestine into separate Jewish and Arab states, and Jerusalem was recognized as an international city. In 1948, the state of Israel was created, which was not recognized by the Arab side. Tensions remain high between Israel and Palestinians living in East Jerusalem, Gaza and the West Bank of the Jordan river. East Jerusalem is claimed by the Palestinians as the capital of their future state, whereas Israel claims the entire city as its capital and has the permanent support of the USA in this matter. The experience of the state of Israel vividly demonstrates the development of tourism in conditions of constant escalation of armed conflicts since the relevant authorities managed to develop not only an effective state policy, but also to adapt various social spheres – in particular, tourism – to such circumstances. The most popular among visitors to the country are the following cities: Jerusalem, Tel Aviv, Nazareth, Bethlehem, Haifa, Eilat and the resorts of the Dead Sea.

Egypt is developing tourism at a frantic pace thanks to the historical monuments and natural features of the sea coast of the Sinai Peninsula. In 1967-1970, there was a war in the country, which was started by Egypt in order to return the Sinai Peninsula, which Israel had previously captured during the Six-Day War. This war was fought mostly with the help of artillery from the Egyptian side supported by the Soviet armed forces and aviation from the Israeli side. The conflict ended with a cease-fire agreement without territorial changes. The truce lasted three years. A peace treaty was signed only in 1979, and Israel withdrew its troops from the Sinai Peninsula in 1982. Few tourists remember that hostilities took place in the country – they go to Egypt to relax by the sea, look into the unique underwater world with corals and see the world-famous pyramids and ancient Luxor. In 2019, almost 15 million tourists visited the country. The share of tourism in the economy of Egypt is nearly 12%. During the entire period of quarantine restrictions in 2020, Egypt's income from tourism decreased by 70% compared to 2019. Two million tourists visited Egypt in 2021 [Majumdar et al., 2022].

We see that the countries mentioned have strategically and logically concentrated tourism in their most favorable areas, where there is a large concentration of tourist resources such as mountains, plains, rivers, lakes and winter and summer resorts. This is because this are always more attractive for tourists.

Ukraine should also develop its own approach to developing tourism in war and post-war conditions. Its tourist operators should be ready with new tourist products, clearly understanding what they convey to people who will come to Ukraine after the military conflict is over. Moreover, tourist operators must create new marketing products (in particular, itineraries through places of memory) and make them safe. Hundreds of millions will want to visit Ukraine as a country of brave people with a mad thirst for victory and the will for freedom. It is a country that has now protected all of Europe from the dangerous enemy of modernity, a country of honor and dignity and endless heroism after the war's end.

We can confidently say that many tourists, including foreign ones, will want to visit those places that have already become symbols of the Russian-Ukrainian war. If, until now, people travelled to the places of Cossack glory - to Kholodny Yar, Cherkasy, Khortytsia – they will now be joined by the places of the current glory of Ukraine - Bucha, Gostomel, Mariupol and Chornobayivka. It is important for tour operators in Ukraine under the auspices of the STDA to develop such tourist programs at once so that Ukrainians and foreigners have an understanding of what happened and tell their children and grandchildren about the brave struggle and victory. Thus, 3D tours of buildings destroyed and damaged by the Russian invaders appeared in the capital, Kyiv region, and Chernihiv. The goal of the project is to show the world community the real scale of the destruction. During walking tours of the capital, they tell about the history of the city that survived the Second World War war and the current full-scale invasion of Ukraine. The route covers the TV tower and other buildings in Kyiv destroyed or damaged by Russian shelling.

With the assistance of the STDA, a project of memory routes is being developed: part of the objects destroyed by the occupiers will be preserved for history to show what crimes the aggressor country committed in Ukraine. The most destroyed cities will also rebuild infrastructure in such a way as to leave some places intact. Also, the Ukrainian project 360war. in.ua created panoramic photos of the liberated cities of the Kyiv region – Bucha, Irpen, Gostomel, Borodyanka, Makarov and Gorenka.

Interest in Ukraine is unprecedented, which is clear in today's military realities. Today's attention to Ukraine from almost the entire civilised world can also be used to its benefit. Thus, the National Tourism Organization of Ukraine (NTOU) launched the "Scream for Ukraine!" campaign on the internet to draw the attention of the global community to the terrible situation in Ukraine. Tour operators, hotel and restaurant owners supported the armed forces from the very beginning of the war. It is important to transform the slogan "Stand with Ukraine", which for most foreigners currently sounds like a call for help, into the slogan "Visit and Help" for Ukraine to recover. The Association of Hotels and Resorts of Ukraine initiated the campaign "Visit Ukraine in the future" to support the Ukrainian hotel business, which participates in securing the rear during hostilities and suffers large financial losses due to the war. Foreigners who want to support Ukraine can make "charity reservations" for rooms in Ukrainian hotels for any day during 2022, and they will be able to visit after Ukraine's victory in the war. In particular, thanks to the Airbnb application, about 61,000 beds were booked for almost USD 2 million [VisitUkraine. today, 2022].

The tourist market situation is complicated because it has only begun to recover gradually after a significant drop in 2020–2021 due to the COVID-19 pandemic. Market research revealed that the main factors of the low economic situation of the tourist services market in Ukraine are: the safety and the attitude of tourists to risk; reduction of citizens' incomes and increase of priority expenses; men cannot travel abroad with their families; time constraints due to logistical difficulties with departure (airports do not work, the railway sometimes runs with delays or you need to make several transfers, etc.).

Tourist operators encourage people to travel to Ukraine to partially detach themselves from the events in Ukraine, as well as to support the country in an economic sense since tourism is a sector of the economy that gives impetus to a whole chain of related industries, one job in tourism creates up to ten different jobs in other industries. The only problem is that it takes time because tourists are waiting for it to become completely safe. It is difficult to make a short- and medium-term forecast of the market of tourist services in Ukraine because it is not clear how the situation will develop on the frontline, citizens' incomes have decreased and some have been left without a roof altogether, meaning they have no funds for recreation. Specialists and experts in the tourism industry associate all forecasts for developing the tourist services market in Ukraine under martial law with its domestic segment. At the same time, indicators of both the number of domestic tourists and the receipt of funds from it to the country's budget are not predicted.

The tourism market in Ukraine has many expectations and development plans after the victorious peace. Based on the results of the research, we can state that the following factors will influence the operations of the tourism market in Ukraine in the post-war period:

- Firstly, the growing need for recreational tourism. Two years of the COVID pandemic, which quickly brought people into the chaos of war, followed by a wave of migration, going beyond everyday life, stress, grief and losses. After these horrors, people will want something simple and relaxing. Resting by the sea, in the mountains or in the forest is something that will bring you back to life and help you regain your strength;
- Secondly, the popularity of retreat tours will help to restore their mental health. Many people are mentally and physically exhausted, especially those who were in the center of events: soldiers, doctors, police, emergency services and citizens who found themselves in the epicenter of war and destruction. Pottery, egg coloring, etc. will help cure stress;
- Thirdly, growing interest in traditions and trips to native familiar areas. People want to experience something familiar: spending the weekend with a fishing rod by the pond, watching children play in the yard, etc. It will give a sense of everyday life before the war. People will be interested in very grounded, almost routine things that restore confidence that life goes on and help them feel the joy of the moment;
- Fourthly, the desire of Ukrainian and foreign tourists to see the places of military successes and

the places they read about in the news. Interest in places like Bucha, Irpin, Borodyanka and Mariupol will definitely increase.

In the post-war recovery, the country needs to account for bomb shelters at tourist sites, full plans for evacuating valuables in museums, etc. It is already obvious that the program to restore the lost tourist infrastructure may become the largest in modern history and will require the involvement of huge resources and time.

Until recently, Ukraine was one of the few countries in Europe that did not have the privilege of membership in the European Tourist Commission (ETC). Now, the ETC has officially invited STDA to join this organization. During the General Assembly, the members of the ETC – the heads of the national tourism bodies (NTOs) of Europe – expressed their full solidarity with Ukraine and decided to start the procedure for granting STDA membership for at least three years on a free basis. At the end of this term, an additional decision on standard membership will be made. The main mission of the ETC is to represent the interests of European NGOs, promote European countries as tourist destinations worldwide and provide unique expertise to member countries and a stable base for strategic cooperation and exchange of experience. The decision on complimentary membership in the ETC for Ukraine will enable STDA to use this organization's resources and attract investments and funds for developing tourist locations in Ukraine. The commission intends to create an aid fund – the proceeds from which will be for the restoration of the tourist and recreational infrastructure of Ukraine.

#### CONCLUSIONS

Summing up, let's once again note that the tourism sector reacts very sensitively and painfully to social challenges caused by armed military conflicts. At the same time, in the depths of such an unfavorable situation, prerequisites are formed and opportunities are created for the post-war tourism market – which can resurrect the new realities of Ukraine.

Currently, Ukraine is developing a plan for the recovery of the country designed for ten years. It

includes all the most important sectors of the economy, including tourism. A separate working subgroup has been created in STDA, which has developed a plan and determines priority directions for the recovery of the tourism industry.

Reconstruction of Ukraine's economy after the war and its modernization will require international experts from various fields. The experience of many countries in which military operations took place shows that the number of tourists to such countries in the post-war period is only increasing. And income from foreign tourists allows you to support the country's economy faster than other industries requiring longer recovery.

At the same time, with landmark post-war locations, the tourism business will showcase the hospitality of Ukraine with its incredible nature, ancient culture and delicious cuisine. Today, the whole world admires the Ukrainian people, and the main goal of the tourism industry is to enhance the interest of tourists in travelling to Ukraine and, thus, restore it. This is because tourism is one of the easiest and fastest ways to attract foreign funds to the country's economy. Based on the results of our research, we conclude that an effective tourism market during the war is strategically important for the state and citizens.

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#### CZYNNIKI MARKETINGOWE WPŁYWAJĄCE NA DZIAŁANIE RYNKU TURYSTYCZNEGO NA UKRAINIE W STANIE WOJENNYM

#### STRESZCZENIE

**Cel:** Artykuł poświęcony jest analizie czynników marketingowych wpływających na funkcjonowanie rynku turystycznego na Ukrainie w stanie wojennym. **Metody:** W badaniach wykorzystano metodę analizy danych wtórnych dotyczących problematyki badań. **Wyniki:** Autorzy ustalili, że rynek turystyczny zawsze reaguje bardzo wrażliwie na zdarzenia kryzysowe (pandemie, niszczycielskie klęski żywiołowe, kryzysy polityczne, militarne itp.) i zwracali uwagę na zmianę formatu rynku turystycznego na Ukrainie w warunkach przedłużającej się wojny rosyjsko-ukraińskiej. Autorzy zidentyfikowali główne czynniki obecnej sytuacji na rynku usług turystycznych na Ukrainie w warunkach stanu wojennego. Funkcjonowanie rynku turystycznego w czasie wojny ma strategiczne znaczenie dla państwa i obywateli. **Wnioski:** Autorzy podsumowali doświadczenia sektora turystycznego krajów, które przeżyły podobną sytuację kryzysową i stały się liderami na regionalnych rynkach usług turystycznych w celu skutecznego jej wdrożenia na Ukrainie oraz określili główne czynniki funkcjonowania rynku usług turystycznych w segmentach turystyki krajowej i przyjazdowej po zwyciężeniu w wojnie, mając na celu wprowadzenie innowacyjnych kierunków ożywienia i dalszego rozwoju tego rynku.

Słowa kluczowe: turystyka, rynek turystyczny, czynniki marketingowe, stan wojenny, Ukraina



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# BEING A WOMAN IN ACADEMIA: RESEARCH IN THE CONTEXT OF CAREER EXPERIENCES

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#### ABSTRACT

**Aim:** This study was carried out to understand why women academics, who are adequately represented and have an advantageous position, are subject to various obstacles. **Methods:** In the research, phenomenological research design – one of the qualitative research methods – was used. The research's study group consisted of 20 female faculty members, including three research assistants, six teaching assistants, six assistant professors, two associate professors and three professors working in various cities in Turkey. The branches of the participants and the institutions they work vary. The study group was determined by using the snowball sampling method. In this study, a semi-structured interview type was used. As a data collection tool, a semi-structured interview form was prepared by the researcher. **Results:** After, expert opinions were taken, and final corrections were made and used as a data collection tool. As a result of the research, the obstacles that female academics face in their work lives, the reasons for these obstacles and the coping strategies that female academics have developed to cope with these obstacles have been revealed. **Conclusions:** The results of the research indicate that even academics, who have a status in society and require a high level of education, are exposed to various career barriers. Therefore, it is possible to say that gender discrimination affects all women regardless of their status and education level, albeit at different levels and forms.

Key words: gender, female academics, career barrier

JEL codes: J160, J710, J810

#### INTRODUCTION

In Turkey, especially with the increase in the number of universities after 2006, the number of female academics has increased quantitatively [Arslan, 2014]. The share of women in the total number of academics in Turkey, including all professors, associate professors, assistant professors, research assistants, specialists, translators and lecturers is 43.5% – which is above the world average [Demir, 2018].

Legal, socio-cultural, technological and sectoral changes in working life [Yorgun, 2010] caused physical strength to begin not to be seen as an advantage in business life. The fact that knowledge-based power was at the forefront made it easier for women to be included in business life. [Sarı and Çevik, 2009]. Thus, knowledge and, therefore, education took the place of muscle strength. Education is one of the most important factors in empowering women. Educated women can have more power and resistance against gender inequality and various social pressures. Education does not only affect women's employment; it also affects issues such as living standards, self-determination and even social communication [Günday 2011, Keskin 2018].

In countries like Turkey, where the classical patriarchal mentality is dominant, education level is considered a tool for social and individual change and a key that can reduce inequalities between the sexes [KSGM, 2017] and can even play a decisive role in women being victims of murder. 300 women were killed in Turkey in 2020; 171 women were found 'suspiciously' dead [kadincinayetleridurduracagiz.net]. It is seen that 74% of female victims are uneducated or primary school graduates, while 77% of male perpetrators are uneducated or primary school graduates [Sarioğlu, 2019]. In the segments of society with a relatively low socioeconomic status, economic dependency due to not participating in business life, unpaid intensive labor in home life, precarious work and high rates of femicide can be explained by the lack of education factor.

Due to the nature of the profession, female academics appear as the group of women with the highest education level in society. Women academics are defined by Kandiyoti [2015] as "an advantageous group within a disadvantaged group of women". It is known that higher education facilitates the ease of some difficulties related to gender perceptions [Bourdieu, 2001]. Owing to their high education levels and professional life, which signifies a high status in society, women academics paint a picture free of the aforementioned gender-based discrimination experiences. However, studies reveal that female academics are also exposed to some barriers or forms of gender-based discrimination stemming from their female identities [Coşkuner, 2013, Arslan, 2014, Bingöl, 2014, Öztan and Doğan, 2015, Şentürk, 2015, Gerdek, 2017]. At this point, factors such as education and status - which are seen as the advantages of academic women - also make gender discrimination behaviors invisible and, thus, become a disadvantage. Therefore, the discriminatory behaviors that women academics are exposed to should be further investigated and made visible.

This research was designed to understand the career barriers of female academics, the small groups that cause these barriers (e.g., managers, the person themself, etc.) and how women cope with the main reason that causes these barriers – namely the patriarchal social structure.

#### METHODOLOGY

This research is a qualitative study. According to Creswell [2018], qualitative research should be used when a problem or issue needs to be explored. The

qualitative study method allows the researcher to generalize by revealing the basic characteristics of the social or individual situations and events that individuals have experienced throughout their lives.

#### **MODEL OF THE RESEARCH**

In the study, phenomenological research design – one of the qualitative research methods – was used. The phenomenological study defines the common meanings of individuals' lived experiences about a phenomenon or concept. In this research design, the researcher focuses on the common characteristics of the participants who experience a phenomenon. The phenomenological study pattern begins with defining the phenomenon with which the study is concerned [Creswell, 2018]. The phenomenon defined in this research is "being a female academic". Afterwards, in-depth interviews were conducted with the participants - namely female academics - who experienced this phenomenon. Additionally, their experiences and opinions about the described phenomenon were learned.

#### **WORKING GROUP**

In this study, the snowball sampling method, one of the non-probabilistic sampling types frequently used in qualitative research, was used. In the snowball sampling method, the next person is reached as a result of the information provided by the first person. In the snowball method, the researcher – who does not know anyone before – is directed to another person whom they do not know after reaching a person. When sufficient information is reached, the research ends. Thus, the growth of the snowball is completed [Kozak, 2017].

The participant group of this study consists of 20 female faculty members, three of whom are research assistants, six are lecturers, six are doctoral faculty members, two are associate professors and three are professors. The branches of the participants vary and they work in different institutions. In the presentation of the research findings, each participant was given a pseudonym to hide and protect their identity.

## DATA COLLECTION TOOLS AND DATA COLLECTION PROCESS

An interview is a qualitative data collection tool that establishes mutual communication in the form of questions and answers with the person whose observation is deemed appropriate in interviews, body language, etc., as well as questions and answers. Elements can also be observed as data collection tools [Kozak, 2017]. The interviews were recorded while being conducted and were then transcribed as they were.

Before starting the interviews, the participants were given brief information about the general research and the topics. The researcher committed [to the participants] that their personal information would be kept confidential and that the data they provided would be used only for scientific purposes. The participants were also asked whether they wanted to participate in the study. Afterwards, the interviews started by asking for permission to record the interview.

At the beginning of the prepared interview form, the participants were asked to provide information about themselves and their careers, and their demographic data was collected. In the interviews, 13 questions consisting of semi-structured questions were asked. These questions were presented to the expert opinion while they were drafted, and they were finalized as a result of comments by the lecturer. Within the scope of the research, a total of 20 participants were interviewed. The shortest interview with the participants lasted 25 minutes and, the longest, 75 minutes.

#### ANALYSIS OF DATA

According to Creswell [2018], the core of qualitative data analysis is defining, classifying and interpreting data and creating codes and categories (themes) within this cycle. At this stage, researchers develop themes and dimensions by creating detailed descriptions; they develop an interpretation in light of their views of different perspectives in the literature.

In this study, where data was collected through semi-structured interviews, the content analysis method was used to analyze the data. In this direction, first of all, the data was divided into certain codes and these codes were then associated with certain themes. Finally, the relationship between these themes was determined. While interpreting the research findings, quotations from the participants' statements were frequently included. This is also a useful method to increase the internal validity of the study.

Immediately after the interviews with the participants, the interview records were transcribed by the researcher in a computer environment. The obtained data was read twice, the concepts and opinions emphasized and codes were created in light of this information. Codes and related themes were determined by making detailed additional readings and it was checked whether any data had been overlooked. In the analysis of the findings, the inductive content analysis method was used. Using this method, the aim is to reach codes and categories in the light of research findings rather than pre-formed codes or categories. The researcher also themed the findings and aimed to help the reader by quoting the participants' statements. In addition, the researcher interpreted the findings by using the concepts in the literature and aimed to provide an additional perspective to the reader.

#### VALIDITY AND RELIABILITY STUDIES

Within the scope of the study, the codes created by the researcher and the theming process of the codes are as follows (Figure 1):



Fig. 1. Theming Process

Source: elaborated by Authors.

To increase the internal validity of the study, the research findings were shared with 14 participants, and their opinions were taken. Participants were asked to confirm whether the research findings matched their statements. In this process, it was observed that the participants' statements and research findings overlapped to a large extent, and necessary corrections were made. In this way, it was ensured that the participants' views were conveyed correctly. In addition to these, to increase the reliability of the research, raw data has been archived to be submitted for an audit if needed.

#### ETHICAL PRACTICES

The main ethical principles that are universally accepted are: respecting and not harming private life, not deceiving/misleading and staying true to data [Yıldırım and Şimşek, 2016]. The data obtained from the participants were not shared with third parties in accordance with the principle of respecting the private lives of the participants and ensuring their privacy. To ensure the confidentiality of the participants, the names of the institutions where they work were not included in the study. In the study, only the data that is important for interpreting the study findings - such as title and experience, and demographic data that provides general information about the participant, such as age and marital status - is included. In addition, to protect the confidentiality of the identities and data of the participants, the ages of the participants are specified as an age range. Instead of specifying the fields of specialization of the participants, only the branch of science to which the participants belong was cited; thus, no demographic data that is not important for the study was included.

To be faithful to the data, the data was meticulously collected, and the original interview was completely faithful to the transcription. At the stage of collecting and analyzing the findings according to themes, the statements of the participants were adhered to and this situation was supported by one-to-one quotations. In addition, the 'Volunteer Participation Form' – which gives general information about the research and undertakes that their data cannot be processed and used for any purpose other than scientific purposes – was presented to the participants who accepted the interview. Additionally, their signatures were obtained.

#### RESULTS

In this chapter, the participants' expectations about being an academic and the strategies and behaviors developed by the participants to cope with the difficulties they encounter in their work-life will be discussed.

## BEING A WOMAN IN BUSINESS: THE SIEGE OF FEMALE IDENTITY

In this section, the participants' experiences regarding the difficulties encountered in business life through the identity of women are presented in Table 1.

#### GENDER-BASED ASSIGNMENT: EMPHASIS ON FEMININE QUALITIES

Although it is assumed that professional identity in academia is not affected by the gender variable, it has been stated that job distributions based on gender roles are made from time to time in some internal assignments. Kübra's statement confirms that gender-based assignments are made in the academy; however, from the participant's point of view, this situation is positive and normal.

"It seemed a bit strange to me then, but our first dean said to me: 'Madam, I see you fit for student affairs because you are a woman because of your speaking abilities and so on.' So, a window is searched somewhere. Courtesy and style are sought.

(...) so, I don't see this situation as bad; I think it should happen. When women aren't there, things get a little ruder and uncivilized..." (Kübra).

Bourdieu [2001] indicates that women are almost always assigned duties involving representation, welcoming and hospitality. According to Bourdieu, this assignment is based on "symbolic capital" activities carried out by the woman for her family. Generally, everything related to aesthetics and the management of the public image and social appearance of the domestic unit is the responsibility of the woman. Therefore, women who manage the symbolic capital of the family are invited to work life to continue this role.

### MANSPLAINING AND MOBBING: THE SHADOWING OF EXPERTISE BY GENDER

The presence of women in business life in Turkey has been increasing for a long time. As a result of this increase, the development of which has been examined in detail in the literature, women can maintain their existence in all areas of business life and expand their areas of existence. However, no matter how qualified

Category	Code	Defne	Özlem	Manolya	Dilek	Songül	Esra	Burcu	Yasemin	Hülya	Sevim	Leyla	Nur	Hatice	Elif	Meryem	Zehra	Merve	Kübra	Tuğba	Sibel
life	assignment based on gender roles						$\checkmark$	$\checkmark$											$\checkmark$		
iness	mansplaining															$\checkmark$		$\checkmark$			
Difficulties faced by female identity in business life	gender-based mobbing																		$\checkmark$		
	work-life loneliness			$\checkmark$				$\checkmark$								$\checkmark$					
	sexist behavior and expressions by male colleagues/counsellor				$\checkmark$				$\checkmark$						$\checkmark$	$\checkmark$		$\checkmark$	$\checkmark$	$\checkmark$	
	sexist comments and expressions by students						$\checkmark$		$\checkmark$							$\checkmark$					
	non-recruitment/preference based on gender							$\checkmark$								$\checkmark$		$\checkmark$	$\checkmark$		
	negative attitudes and behaviors by female colleagues																				

Table 1. Difficulties faced by the participants in business life over female identity

Source: elaborated by Authors.

or professional, a woman's identity can sometimes override her professional identity. Sometimes, the behaviors and expressions targeting the female identity of academics are manifested in a way hidden in jokes or attitudes.

"For example, this is what I observed with students. Let's say a male teacher acts much more harshly and treats angry to students. I read comments about him stating that 'he is a very angry, very disciplined, very harsh teacher' and so on (...). So, they say good grades are scarce. But, for example, if there was a female teacher with an attitude, what do you think the same students would say? I am leaving this openended and up to your imagination" (Esra).

"For example, a student of mine once wrote something about me which made me sad: 'Anyway, I won't say bad word. I wonder if there was a male teacher instead of me, would he have said the same thing again?"" (Yasemin).

Esra and Yasemin's experiences indicate that not only colleagues and administrators, but also students have different perceptions of "female teachers" and "male teachers". Students not only tolerate some harsh behaviors of male teachers, whom they see as "authority figures", but also develop various behavioral strategies in order not to "make them angry". However, when a similar situation is experienced with a female teacher, it is seen that the same students do not avoid verbal attacks.

#### WOMEN'S VIEW OF WOMEN: REPRODUCTION OF MASCULINE DOMINATION WITH THE COOPERATION OF WOMEN

Blaming only colleagues or male managers for certain sexist behavior patterns that women encounter in business life carries the risk of creating stereotypes and an incomplete analysis. As mentioned in the literature, it is a well-known fact that executive women can put some obstacles in front of other women. Queen bee syndrome has been defined as "jealousy between women" [Gökkaya, 2014]. However, the findings indicate that women may have somewhat negative ideas about other women for different reasons and without a superior-subordinate relationship as with the queen bee syndrome: "Whether having a child affects a person or not depends on the person. Because, around me, I see academics who come from 3-4 months of maternity leave, do almost all their work and go to their homes normally again like working hours. But some may not want to return with unpaid leave for up to two years. On the one hand, it just seems a little more personal to me" (Hülya).

For example, Hülya's comment on whether having a child affects the careers of female academics negatively is positioned towards the impact of having a child on a career as "preventable by women". If this thought is read backwards, it is concluded that the woman does not try enough or does something wrong.

"The only thing I care about in terms of management is to be solution-oriented. So, whoever finds the best solution should be it. Since we are more detailed with women, or rather women, we cannot reach a solution more quickly. Therefore, it was softness and so on

(...). I think it is more difficult to work with women. But this is because, as I said, it is necessary to be solution-oriented. Otherwise, sensuality can happen to anyone. There are men like women (...). There are men who tell fortunes, so they are in this school. Therefore, I do not see such a distinction as correct. It is a little difficult in case of problems since only women have elaboration" (Sibel).

Words embedded in everyday language appear as one of the important indicators in understanding the perception of gender. The participant states that as a manager, she prefers working with her male colleagues to working with her female colleagues. The participant bases this preference on the fact that women are more detail-oriented and, therefore, delays the work – thus legitimising this request in a way. Another important point here is that the participant sees the act of "fortune telling" as a feminine act. To mark fortune-telling and sensitivity as feminine qualities are, in a way, that men also have their share of masculine domination. Because masculine domination is a trap for men who build it and think it works for its benefit as much as its victim. As a result of this domination, masculinity; has been put on a point that needs to be proven and even deserved. This, paradoxically, makes masculinity fragile.

#### INDIVIDUAL STRUGGLE: COPING STRATEGIES

The first of these coping strategies (Table 2) is that participants develop behavioral patterns specific to their work life.

"(...) We had to act more authoritatively, so we had to take that stance. For some reason, we had to show that we were more determined (...). Inevitably, there is pressure on us, and disdain is formed. Let's just say I had to be more controlling and tougher" (Merve).

The need for women to behave by the social codes of men when they are in managerial roles arises due to the imposition of the male-dominated structure. As a result of the concept of power associated with masculinity, even a woman in power is expected to behave by masculine behavior patterns. According to Bourdieu [2001], since being "feminine" means avoiding all kinds of masculine features and practices – and

Category	Code	Defne	Özlem	Manolya	Dilek	Songül	Esra	Burcu	Yasemin	Hülya	Sevim	Leyla	Nur	Hatice	Elif	Meryem	Zehra	Merve	Kübra	Tuğba	Sibel
strategies	differentiating behavior patterns at work due to female identity			$\checkmark$			$\checkmark$	$\checkmark$					$\checkmark$		$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$		
Coping str:	pushing mental/physical limits for success																				
C	working during rest hours															$\checkmark$					

Table 2. Coping strategies of the participants

Source: elaborated by Authors.

especially since the concept of power is considered a masculine sensitive – telling a woman in power that she is "too feminine" also means that she is not able to fulfil her duty properly. Therefore, this saying subtly reminds us that power belongs to masculinity.

From time to time, women are perceived as women before their colleagues in business life and, therefore, have to cope with a series of prejudices. It was seen that another coping strategy of female academics was to exert more effort than their male colleagues and, sometimes, even to push their own physical and mental limits for this purpose.

"I'm in favour of non-discrimination. On the contrary, I think this so-called 'positive discrimination' contributes to the fact that women always (I observe this in other places, at least for myself) make more of an effort to prove themselves. For example, I had a child, but I still went back to work. I say even though I am a woman, and I say this again in quotation marks, I am still successful. I went abroad even though I have ties – it seems like I still fulfilled the criteria I had to (...). I feel a lot of pressure [on me] compared to a man" (Esra).

Esra tries harder to prove that she does not need such tolerance, despite the insinuations and statements that even if she makes a mistake or is not academically competent, she will be treated with tolerance because she is a woman. Because of this situation, the participant feels pressure and makes more effort than her male colleagues, both for herself and to equalize the general stereotypes about women.

#### **DISCUSSION AND CONCLUSIONS**

This research is limited to the opinions of female academics working in various provinces of Turkey with different academic titles. The research was conducted to holistically reveal the career barriers of female academics in Turkey. In this respect, it differs from other studies conducted in Turkey in that it addresses the barriers originating from both male and female colleagues and includes coping strategies.

Advancement in an academic career is only possible with the fulfilment of certain objective criteria. This feature of the academic career makes it difficult to understand the existing barriers and fight against them by suggesting that academia is a field free of gender-based discrimination. Within the scope of the research's findings, it is seen that the participants sometimes fail to notice the signs of gender-based discrimination they encounter in their business life.

Although the awareness of female academics about career barriers is insufficient, the research findings are in line with some results in the literature. Participants' statements confirm that female academics are exposed to various career barriers – especially mobbing [Öztan and Doğan, 2015] – and that female academics sometimes experience work-life loneliness [Demir, 2018]. As a result of a study conducted with female academics in South Africa [Dlamini and Adams, 2014], the fact that women experience superiority, disempowerment and disrespect proves that the harms of patriarchy are universal for female academics.

Some participants stated that they pushed their physical and mental limits to cope with the discrimination they experienced. Participants used this strategy to override negative prejudices against women and demonstrate that there is no need for discrimination where positive discrimination exists; in short, they adopt the female identity to separate it from the professional identity. A similar result was revealed in a study conducted in Nigeria, and it was determined that female academics at management levels had to make a series of sacrifices based on home and work life [Ekine, 2018]. In addition, studies conducted in Ethiopia [Ademe and Singh, 2015] and India [Gaikwad and Pandey, 2022] reveal that female academics at management levels in these countries are also affected by patriarchal attitudes and behaviors in business life. In both countries, women are suffering by not seeing respect from their male colleagues and tend to make an extra effort to prove their competence.

The fact that women have to push their physical limits from time to time, even in a profession based on mental labor such as academics, shows that the distinction between women's work and men's work is not based on valid reasons. The main reason for this distinction is that the patriarchal social order considers business life more suitable for men than women [Bourdieu, 2001].

As a result of this research, it is seen that gender discrimination in academia has gained power to the

extent that it is invisible, and patriarchy is a universal problem that affects even highly educated women. Therefore, the first step to overcoming career barriers should be to gain awareness. Otherwise, as Bourdieu [2001] stated, as can be understood from the findings – women not only become aware of the patriarchal system but also engage in behaviors and discourses that feed this cycle.

In this direction, future research should be done on how to raise awareness regarding the signs of patriarchy in business life – especially among academic women. In addition, it would be appropriate to conduct studies on what policies higher education institutions should follow to prevent sexist approaches.

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#### KOBIETA W ŚRODOWISKU AKADEMICKIM: BADANIA W KONTEKŚCIE DOŚWIADCZEŃ ZAWODOWYCH

#### STRESZCZENIE

**Cel:** Celem badań było wyjaśnienie powodów barier rozwoju zawodowego kobiet pracujących w ośrodkach naukowych. **Metody:** W badaniach wykorzystano fenomenologiczne projektowanie badań jako jedną z jakościowych metod badawczych. Grupa badawcza składa się z 20 osób, w tym trzech asystentek naukowych, sześciu asystentek nauczycielskich, sześciu adiunktów, dwóch profesorów nadzwyczajnych i trzech profesorów pracujących w różnych miastach Turcji. Branże uczestników i instytucje, w których pracują, były różne. Grupę badaną wyznaczono metodą doboru próby kuli śnieżnej. W badaniu wykorzystano jeden z typów wywiadów częściowo ustrukturyzowanych. Jako narzędzie zbierania danych zastosowano pół ustrukturyzowany formularz wywiadu, a po wykonaniu ekspertyzy dokonywano ostatecznych poprawek i wykorzystano je jako narzędzie zbierania danych. **Wyniki:** W wyniku badań ujawniono przeszkody, jakie kobiety napotykają w akademickim życiu zawodowym, przyczyny tych przeszkód oraz strategie radzenia sobie, jakie kobiety opracowały w celu radzenia sobie z tymi przeszkodami. **Wnioski:** Wyniki badań pokazują, że nawet pracownice akademickie, które mają wysoki status społeczny i mają wysoki poziom wykształcenia, narażone są na różne bariery rozwoju zawodowego. Dlatego można powiedzieć, że dyskryminacja ze względu na płeć dotyka wszystkich kobiet bez względu na ich status i poziom wykształcenia, choć na różnych poziomach i formach.

Słowa kluczowe: płeć, kobiety akademickie, bariera kariery

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The journal *Acta Scientiarum Polonorum Oeconomia* features original scientific articles related to all aspects of economy, for example: food economy, European consumer goods market, sustainable regional development, development of culture environment, post crises political and social processes, human and social capital, labour market – gender perspective, public finances, rural development and entrepreneurship, social and innovative entrepreneurship, tourist economy.

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