

THEORETICAL PRINCIPLES FOR DETERMINING THE PRINCIPLES OF ENSURING SOCIO-ECONOMIC SECURITY AS THE BASIS OF THE COMPETITIVENESS OF UKRAINIAN ENTERPRISES UNDER THE CONDITIONS OF DIGITALIZATION

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Abstract. *The purpose of this article is to study and identify groups of principles of ensuring socio-economic security under the conditions of digitalization; the formation of ways of ensuring socio-economic security of enterprises as a prerequisite for increasing competitiveness. The analysis of the approaches of scientists to determining the principles of ensuring social and economic security of enterprises is set forth in the article; a group of principles of ensuring socio-economic security as a prerequisite for the formation of competitive advantages of Ukrainian enterprises is specified; the emphasis is laid on threats to the socio-economic security of enterprises; arrangements to ensure socio-economic security of enterprises are worked out. Methodology.* In the article, general scientific methods that allowed achieving the set goal and the formed tasks are used, among them: theoretical generalization; abstract-logical; comparison; grouping; systematization ones. The application of theoretical generalization and comparison methods has afforded the opportunity to analyze, consider, and determine the special aspects of existing approaches of scientists to the formation of principles of social and economic security of enterprises, as well as the advantages and disadvantages of their use at enterprises. The grouping method and the abstract-logical method give an option of singling out a group of principles for ensuring social and economic security and determine the impact of security on the competitiveness of enterprises. On the basis reasoning from the systematization of the results obtained, threats to the social and economic security of enterprises were identified, and arrangements to ensure it were formed. *Results.* It was established that ensuring social and economic security at enterprises plays an important role, as it affects the stability of economic activity, the efficiency of functioning, development areas, personnel policy, employee motivation and, accordingly, allows the formation of competitive advantages. The results of the study proved that social and economic security contributes to the growth of competitiveness, the protection of the enterprise from threats of the market environment. It was determined that there is a need for ensuring social and economic security at enterprises, which requires the introduction of appropriate means. The necessity of using a certain group of principles for ensuring socio-economic security has been proven, which play an important role in forming the desired level of security, which, in its turn, impacts the adaptation of the enterprise to risks, the external environment, ensures sustainable functioning, and the formation of competitive advantages. Threats to the socio-economic security of the enterprise have been identified and arrangements have been developed to increase it. *Practical impacts.* Compliance with the principles of ensuring socio-economic security at enterprises makes it possible to manage risks, quickly identify threats, adapt to digital transformations, changes, ensure stability and transparency of the labor market, and also contribute to the formation of a safety-related business in terms of supporting sustainable development goals. For another thing, forming socio-economic security on the grounds of observance of the formed group of principles contributes to effective management, growth in performance indicators. *Value / originality.* A group of principles for ensuring socio-economic security has been formed in the paper, threats to the security of the enterprise has been identified.

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Recommendations have been developed for ensuring socio-economic security, which will contribute to increasing competitiveness. Giving consideration to the proposed group of principles is the basis for the formation of socio-economic security, successful use of systems, mechanisms, risk management, identification of threats, adaptation to market changes.

Keywords: socio-economic security, market environment, threats, digitalization, enterprises, principles for ensuring socio-economic security, competitiveness, competitive advantages.

JEL Classification: G32, J28, L2, M1

1. Introduction

The digital transformation processes mainstreaming, the instability of the environment, the intensification of competition put forward a requirement for enterprises to determine the areas, ways, and tools for ensuring the stability of their functioning. One of the important factors for the stability of the work of enterprises, the sustainability of their development is ensuring socio-economic security, which is an important tool for ensuring the stability of the financial and economic position, increasing profitability, and creating a favorable environment for employees through the development of personnel policy and corporate culture. Considering the role of socio-economic security for the functioning of enterprises, it is advisable to use the principles for ensuring it. The practical application of the principles will create a basis for developing arrangements to form and ensure socio-economic security, as well as determine the practical principles for using the system, mechanism, and strategy for ensuring it. The above confirms the relevance of determining the principles for ensuring the socio-economic security of an enterprise.

The purpose of the article is to determine the groups of principles for ensuring socio-economic security as the basis for the competitiveness of Ukrainian enterprises under the conditions of digitalization; development of ways to ensure the socio-economic security of enterprises.

Taking into account the formed objective, the research tasks were determined: to analyze the approaches of scientists to determining the principles of ensuring the social and economic security of enterprises; to identify a group of principles of ensuring socio-economic security as a prerequisite for the formation of competitive advantages of enterprises in Ukraine; to identify existing threats to the socio-economic security of enterprises; to form arrangements to ensure the socio-economic security of enterprises.

To carry out the study, general scientific research methods were used, which made it possible to achieve the set objective and the tasks formed, in particular: theoretical generalization method; abstract-logical; comparison; grouping; systematization ones.

2. Theoretical Foundations for Determining the Principles of Ensuring the Socio-Economic Security of an Enterprise

Socio-economic security is of great importance for the successful functioning of an enterprise, which is determined by its impact on the state of economic activity, financial indicators, profitability, personnel policy, protection from threats, risks of the market environment. Simultaneously, the variability of external and internal environmental factors determines the need for adaptation, taking into account their influence and developing protective measures, which is guaranteed on the basis of ensuring a high level of socio-economic security. The above confirms the importance of ensuring and forming socio-economic security, which justifies the expediency of using practical principles to ensure it. The role of practical principles is represented by the principles that are the basis for the formation, implementation, development of socio-economic security at the enterprise.

Based on the study of existing approaches to determining the principles of ensuring the socio-economic security of an enterprise, it should be noted: author Fisunenko P. defined a list of principles for ensuring economic security and divided it into a group of principles for building and a group of implementation of ensuring economic security (Fisunenko, 2019, p. 184-189); the work of Korchevska L. O. defines systemic, target, functional, structural, and process principles of economic security (Korchevska, 2012, p. 45-48); Malyuta L. Ya. proposed a set of principles for building a mechanism to ensure the economic security of an enterprise (Malyuta, 2018, p. 128, 132-133, 308); in the work of Shtangret I. a list of principles for ensuring the creation of a system of economic security is defined (Shtangret, 2022); author Sorokivska O. A. formed a list of principles of the economic security system of an enterprise (Sorokivska, 2016, p. 40-43); Panchenko V. A. grouped a list of principles for the functioning of the economic security system (Panchenko, 2018); Zos-Kior M., Diachkov D., Pavluk R. grouped the principles of ensuring financial and economic security (Zos-Kior, Diachkov, & Pavluk, 2019, p. 106-108); Lugova V. M., Golubeva T. V. considered the role of social security in the work of

the enterprise (Lugova, & Golubeva, 2011, p. 69-71); Yur I., Sytnyk Y. a list of principles of business social responsibility has been formed (Yur, & Sytnyk, 2024, p. 11); author Belousov V. D. conducted a study of the principles of social security in Ukraine (Belousov, 2014, p. 28-31); the work of Franchuk V. I. considers the general principles of enterprise security (Franchuk, 2016, p. 121-122); the author Berezyanko T. M. defined the principles of socio-economic security of the enterprise (Berezyanko, 2019, p. 13-15); Sydorchuk O. G. highlighted the principles of social security (Sydorchuk, 2018, p. 350-351); author Lingur L. analyzed the principles of corporate social responsibility (Lingur, 2023).

3. Principles of Ensuring Socio-Economic Security as the Basis of Enterprise Competitiveness

With reference to the conducted study of existing approaches of scientists to the accentuation of principles, systematization of their peculiarities, it is proposed to distinguish the following groups of principles of ensuring socio-economic security (Fig. 1): principles of ensuring economic security (group 1); principles of ensuring social security (group 2); principles of formation, implementation, development of socio-economic security (group 3). Compliance with the principles of ensuring economic security of an enterprise should ensure the stability of its economic system under the conditions of influence of threats, risks, market instability and contribute to the growth

of financial indicators, stabilization of production, increased profitability, continuity of performance and development. The group of principles of ensuring social security at the enterprise provides for the protection of the interests of employees, their social stability in the team-spirited workforce, reduction of manpower turnover, prevention of social conflicts through the improvement of personnel policy, corporate culture.

The third group of principles is a comprehensive approach to ensuring economic efficiency and social responsibility, and their observance should determine the theoretical foundations for the formation, implementation, and development of security, which will contribute to the long-term viability of the enterprise.

The first group of principles for ensuring economic security includes those principles, the observance of which should contribute to the financial stability and continuous development of the enterprise (Fig. 2). First, it is advisable to adhere to the principle of resource allocation, which represents the state of financial, personnel, material, technical, and information support necessary to increase economic security, which will contribute to financial stability. Second, the principle of financial stability is important, which determines the ability of the enterprise to maintain solvency, profitability, and financial independence and allows for the formation of arrangements for improvement, which accordingly affects the state of economic security. Third, the principle of competitiveness is aimed at the formation of arrangements to strengthen market

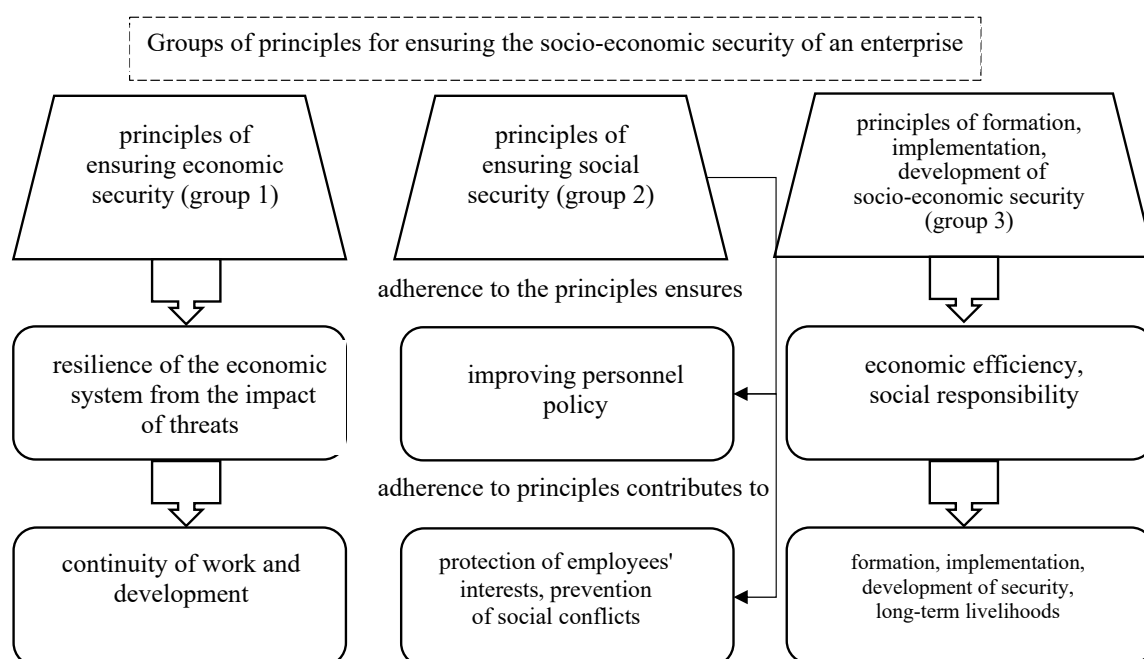


Figure 1. Groups of principles for ensuring the socio-economic security of an enterprise

Source: formed by the authors

positions, which will ensure the growth of economic security. The principle of resource management is highlighted, which will ensure the rational distribution of resources, their effective use, and contribute to the stability of the financial situation and adaptation to possible threats. An important role is played by the principle of risk minimization, which includes the formation of arrangements to identify threats, neutralize their impact, and guarantee the stability of the security level. The emphasis is placed on the principle of innovative development, which is aimed at taking into account the trends of digitalization, artificial intelligence technologies, their use at the enterprise for automation of business processes, monitoring and control systems, which will contribute to increasing security. It is also important to adhere to the principle of information protection, which is focused on cybersecurity, non-disclosure of confidential information, prevention of cyber threats, which guarantees the stability of economic security. As for the principle of anti-crisis management, it makes it possible to form anti-crisis arrangements to identify and overcome economic threats and financial risks. The principle of legality provides for the enterprise's compliance with the norms of legislation relating to economic activity, as well as the protection of its interests. The emphasized principle of the validity of decisions provides for the development of strategic decisions taking into account analytical, calculated, and forecast data on the results of the enterprise economic activity. Compliance with the principle of continuity provides for the constant maintenance of the level of economic security by developing measures and conducting analytical research. Additionally, the optimality principle is of great importance assuming

the efficiency of the enterprise, which is represented in the growth of economic security and guarantees financial stability and development.

The second group of principles for ensuring social security includes those principles that are aimed at ensuring stability in the labor collective, preventing social conflicts, and protecting employees of the enterprise (Fig. 3). The first defines the principle of corporate ethics and its observance is aimed at establishing interaction between employees, which will increase trust, improve reputation, and also contribute to increasing social security. The second should be the principle of fair remuneration, which primarily affects the level of employee motivation and ensures social security. The principle of safe working conditions should also be highlighted, since the creation of comfortable working conditions, minimizing production risks affects the work of employees and guarantees increased social security. Along with the above, the principle of dialogue is highlighted, which will allow establishing communication between employees and management, will help prevent misunderstandings, and take into account comments. It is important to highlight the principle of social security, the observance of which will allow forming a social package, social guarantees for employees of various categories, which primarily ensures social security. Compliance with the principle of legality involves taking into account existing legislation on working conditions, wage levels, and protecting the interests of employees.

No less important is the principle of adaptability, which will allow for a timely response to the challenges of the external and internal environment, adapt to them, and increase the level of security. The principle

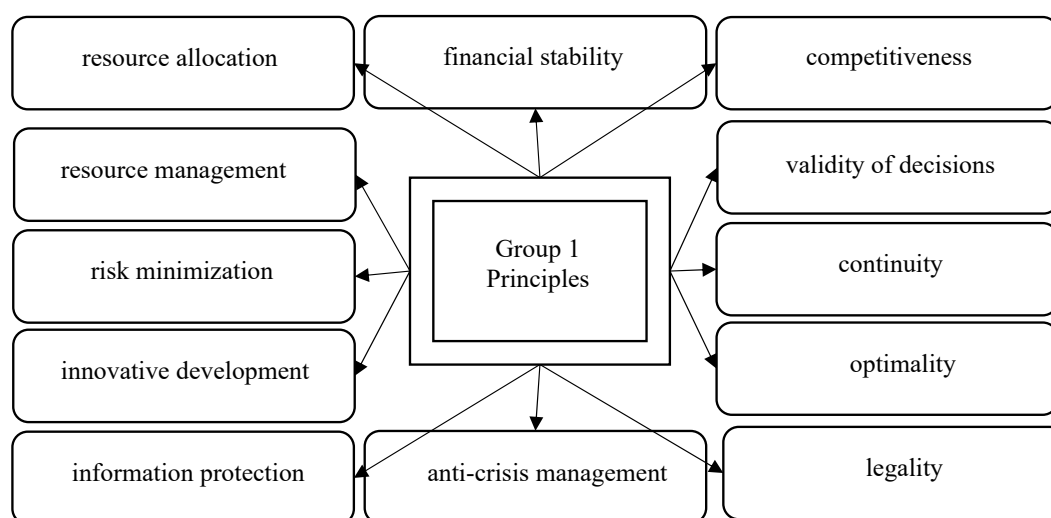


Figure 2. Principles of ensuring the economic security of an enterprise

Source: formed by the authors on the basis of: Berezyanko, 2019, p. 13-15; Fisunen, 2019, p. 184-189; Franchuk, 2016, p. 121-122; Korchevska, 2012, p. 45-48; Malyuta, 2018, p. 128, 132-133, 308; Panchenko, 2018; Shtangret, 2022; Sorokivska, 2016, p. 40-43; Zos-Kior, Diachkov, & Pavluk, 2019, p. 106-108

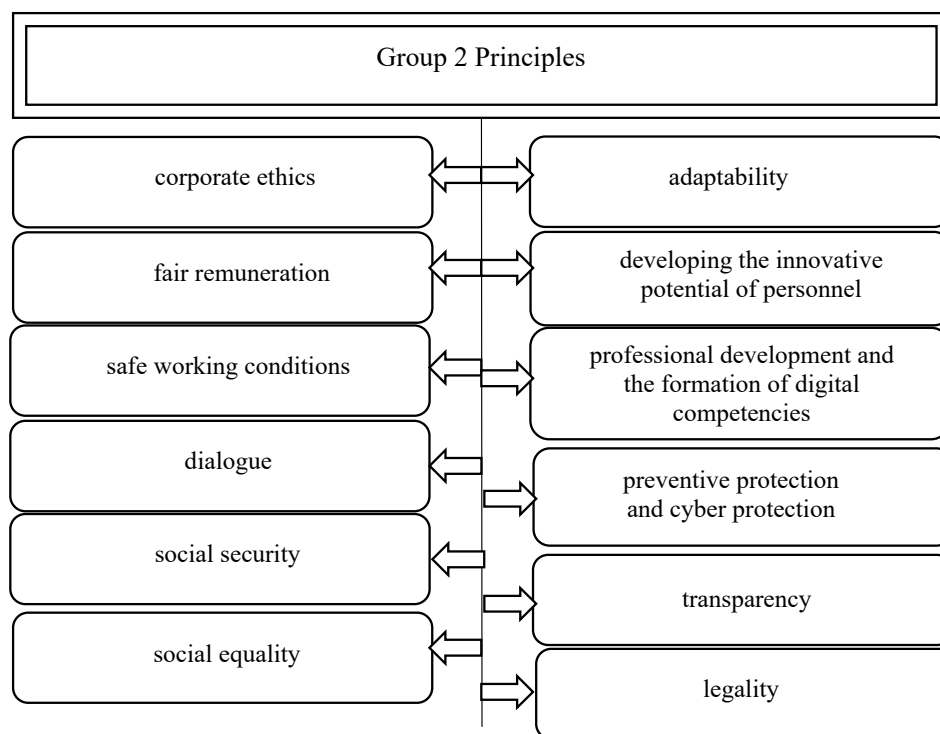


Figure 3. Principles of ensuring social security of the enterprise

Source: formed by the authors on the basis of: Belousov, 2014, p. 28-31; Berezyanko, 2019, p. 13-15; Franchuk, 2016, p. 121-122; Lingur, 2023; Lugova, & Golubeva, 2011, p. 69-71; Sydorchuk, 2018, p. 350-351; Yur, & Sytnyk, 2024, p. 11

of developing the innovative potential of personnel is also highlighted, the consideration of which will contribute to supporting innovative ideas and involving employees in innovative activities. Separately, the principle of professional development and the formation of digital competencies should be highlighted, which is focused on improving qualifications, training employees, conducting webinars on the use of digital technologies, and ensuring career growth. The next principle is the principle of preventive protection and cyber protection, the consideration of which is focused on preventing and eliminating social risks, forming an understanding of cyberattacks, and the importance of information protection. The principle of social equality is important, which is aimed at the equality of all employees and ensuring their rights. As for the principle of transparency, it assumes openness of information, data on working conditions, social package, and talent decisions.

The latter are the group of principles of formation, implementation, development of socio-economic security, which are aimed at ensuring a comprehensive approach to the formation of socio-economic security, which will contribute to supporting the vital activity of the enterprise in the long-run period (Fig. 4). Among the principles of the third group the following are highlighted:

1. The principle of adaptation makes it possible to take into account the influence of external factors, threats, risks, adapt to them in the process of forming and implementing socio-economic security.

2. The principle of digitalization is aimed at implementing modern information technologies for identifying risks, data processing, monitoring, and controlling the state of socio-economic security.

3. The principle of strategic orientation involves determining strategic goals, making strategic decisions in the process of forming and developing socio-economic security.

4. The principle of systematicity provides an opportunity to adhere to a systematic approach, use a system, a mechanism for ensuring socio-economic security.

5. The principle of sustainable development provides a means of combining the achievement of economic, social, environmental indicators in the process of ensuring socio-economic security.

6. The principle of coherence is aimed at taking into account, coordinating the interests of management, employees, clients, which will contribute to increasing security.

7. The principle of consistency provides for the implementation of a set of stages, actions, arrangements aimed at the formation, development of security.

8. The principle of legality give the possibility of taking into account the current regulatory framework at the state level regarding the regulation, formation of socio-economic security.

9. The principle of continuity provides for the need for constant implementation, development of socio-economic security through the implementation of appropriate arrangements.

10. The principle of effectiveness provides that socio-economic security should contribute to financial stability, development, the formation of corporate culture, and increased profitability.

11. The principle of purposefulness allows achieving the established goals, objectives for the formation and development of socio-economic security based on the implementation of stages, decision-making, and implementation of processes.

12. The principle of improvement is focused on the need to improve the system, the mechanism for ensuring socio-economic security based on changes in the market environment.

13. The principle of alternativeness supports the formation of several options for management decisions, choose the most effective one, as well as forecast expected results and form alternative arrangements.

14. The principle of prevention will allow you to timely diagnose, identify threats, risks, prevent their negative consequences, form measures to recognize vulnerabilities and ensure security stability.

15. The principle of organization and planning involves determining goals, objectives within the framework of socio-economic security, ways to achieve

them, determining the responsible unit, organization, planning the level of security.

4. Threats to the Socio-Economic Security of Enterprises and Arrangements to Ensure It

Taking into account the research, the threats to the socio-economic security of enterprises were separated and identified: instability of the economic and political situation; variability of legislation; increasing tax burden; low incomes of the population; decreasing demand for products and goods; increasing competition; increasing prices for resources and costs; manpower turnover; lack of social guarantees for employees and a low level of incentive; insufficient level of remuneration; ineffectiveness of personnel policy; emergence of conflicts in the team; lack of a security strategy and a system for its formation; slow implementation of digital technologies; vulnerability of the information system, growth of cyberattacks; prevalence of outdated equipment; lack of financial support and lack of investment; decreasing profitability of the enterprise; ineffectiveness of the management, monitoring and control system.

Among the main arrangements to ensure the socio-economic security of enterprises, the following are proposed: formation of an effective personnel policy; development of corporate culture; protection of employee rights and provision of social guarantees taking into account various categories; creating safe working conditions and automating the enterprise work; conducting trainings to train employees, prevent

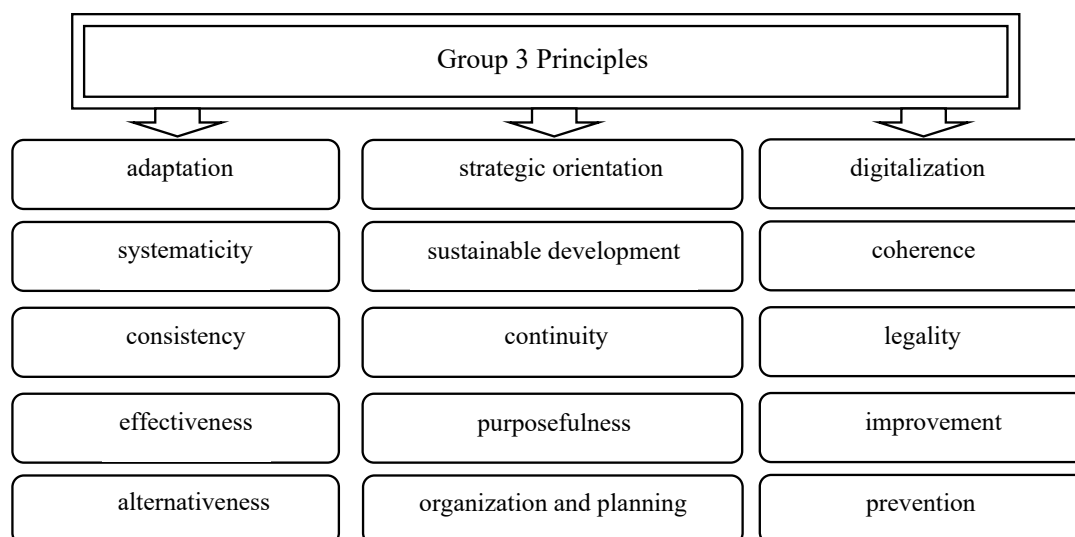


Figure 4. Principles of formation, implementation, development of socio-economic security of the enterprise

Source: formed by the authors on the basis of: Berezyanko, 2019, p. 13-15; Fisunen, 2019, p. 184-189; Franchuk, 2016, p. 121-122; Korchevska, 2012, p. 45-48; Malyuta, 2018, p. 128, 132-133, 308; Panchenko, 2018; Shtangret, 2022; Sorokivska, 2016, p. 40-43; Zos-Kior, Diachkov, & Pavluk, 2019, p. 106-108

conflict situations, and form digital competencies; improving communication between employees and management; developing and implementing a security strategy; forming financial reserves; optimizing costs; adjusting prices and improving production; strengthening control over the enterprise debt; improving financial planning and forecasting; automating production, digitizing business processes, implementing information technologies, software products for monitoring and controlling the level of security, threats, and risks; increasing the level of information data protection; forming a separate unit that will be responsible for the state of socio-economic security; assessing the level of socio-economic security and using the system for its formation; attracting investments, obtaining loans; implementing risk management; using energy-efficient technologies and reducing harmful emissions.

Using the formed list of arrangements will make it possible to increase the socio-economic security of the enterprise, which will affect the growth of economic activity indicators, profitability, the formation of competitive advantages, social stability in the workforce, the improvement of personnel policy, and will guarantee effective functioning.

5. Conclusions

The approaches of scientists to determining the principles of social and economic security have been studied. Taking into account the results of the study, three groups of principles of socio-economic security were identified: principles of ensuring economic security; principles of ensuring social security; principles of forming, implementing, and developing socio-economic security. Taking into account the principles of ensuring the economic security of an enterprise should ensure the growth of financial indicators, increased profitability, and continuity of performance. Compliance with the principles of ensuring social security will allow for the formation of social stability in the team-spirited workforce and the improvement of personnel policy. The last group of principles is aimed at ensuring economic efficiency and social responsibility, and also determines the principles for the formation, implementation, and development of security. Threats to the socio-economic security of enterprises have been identified and arrangements have been developed to increase it, which will contribute to the growth of financial indicators, competitiveness, and social stability.

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