

РОЗДІЛ 2

Макроекономічні механізми

Recent Regional Attractiveness for Shared Value Projects

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Recent decade proved corporate focus on pure profit-maximization as badly selected strategy for the long-term growth and sustainability. The pressure from stakeholders as well as search for new sources of revenues gave birth to the Shared Value concept creation by Michael Porter. The concept that should be able to satisfy both profit creation and address some of pressing social issues. The paper presents own research based on the methodology of Shared Value Initiative. Comparative research, specifically cross-regional comparisons, as well as, cross-comparison of the regions and the social issue were used as a data analysis method. The exclusive Shared Value Initiative Case Examples database describing 164 implemented corporate projects around the world was analysed, both by geographical regions and social issues addressed. The analysis shows polarization of regions. While several regions magnetize Shared Value projects (Global-scale, South America, Central America and Caribbean, North America, Africa, and Asia), the rest of the world seems to be overlooked. In terms of social issues solved, majority of projects focused on Global (Community) Development, Education, including Workforce Development and Health and Nutrition.

Keywords: corporate social responsibility, shared value, stakeholder, shareholder, social problems.

УДК 330

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Introduction. The entrepreneurial activities of companies have never been monitored more than recently. The accessibility of information and evidence by digital technologies and nearly instant possibility of sharing information on the social networks create new kind of pressures on the corporations around the world. Whether it is caused by this effect or their internal motivation to care more after impact of their activities on their stakeholders and environment, companies devote more and more attention to their Corporate Social Responsibility activities. Their approach has evolved from pure philanthropy via effective resources and waste management up to new business model called the Shared Value approach [12]. The model that should encompass both focus on business profit creation and solving social and environmental problems in areas where the company is active and receives the profit from. Shared value stresses the long-term business investments which is in line with the direct criticism of the current frequent short-term focus on returns-on-investment in the business community.

The long-term orientation and focus on solving social and environmental challenges directly associated with the business of the company reflects the sustainable nature of its

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existence within a much wider system. The importance of sustainable economy [8], sustainable regional development [3, 2] in Europe and even sustainable entrepreneurial activities in Amazon rainforest [4] were of recent interest.

The Shared Value approach promises both the development of region or community for stakeholders and profit creation for shareholders. As this business model gravitates the current pressing social and environmental issues to the core of the corporate strategy, the social and environmental issues are in the centre of interest of product or service creation and delivery to final consumer.

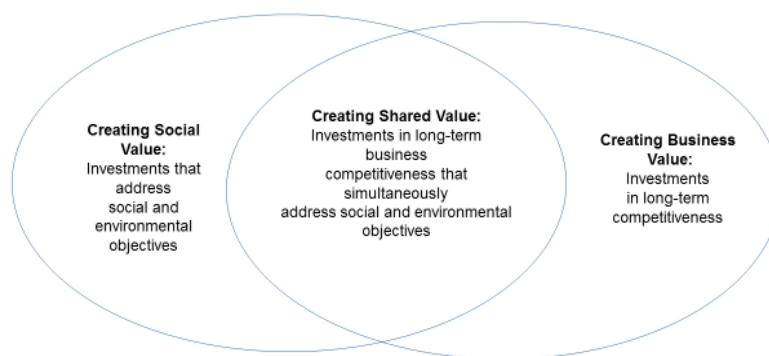


Figure 1. Creating Shared Value [1]

Shared value is a corporate strategy that deals with pressing social or environmental issues that range from financial, health, income inequalities to threats to natural environment. The idea of shared value has been created for a decade. Porter and Kramer (2002) criticized the philanthropy projects for their low context focus and for not bringing finances to companies. Hart and Milstein (2003) introduced their concept of Creating Sustainable Value, represented by a sustainable-value framework, when stressing that companies need to address challenges associated with sustainable development while simultaneously driving shareholder value. Grayson and Hodgets (2004) created Corporate Social Opportunity approach that intends to maximize both social and business benefits from CSR programs. Their seven-step model should help managers through planned changes in their corporate strategies. Then in 2006, Porter and Kramer introduced more profound way to help society and/or environment and simultaneously generate profit. They introduced three types of social issues: Generic Social Issues, Value Chain Social Issues and Social Dimensions of Competitive Context reflecting [11].

The financial and economic crisis commencing in 2008 impacted heavily the Corporate Social Responsibility programs across the whole world. Philanthropy and other socially or environmentally beneficial activities resembling like costs were among the first ceased corporate activities. Non-governmental organizations, charities and other recipients of CSR programs were suffering together with their communities

The idea of Shared Value was more refined and introduced to business world in 2011. Given the introduction timing, it looks like the direct response to the financial and economic

crisis consequences. The Share Value claims to combine both the Social Value, by investments that address social and environmental objectives, and the Business Value, by the investments in long-term competitiveness (Figure 1).

Shared value as a driver of innovation and productivity should accelerate the global economy growth when corporation follow one or more of three ways: by *Reconceiving products and markets*, *Redefining productivity in the value chain*, and by *Enabling local cluster development* [12].

Table 1

Three ways for companies to reach Shared Value [7, 9, 12]

Three ways to reach Shared Value	Example
<i>Reconceiving Products and Markets</i> by improving access to products and services fulfilling societal needs and consequently creating new market and revenue for the company.	“In 2009, GE launched Healthymagination, aiming to develop profitable new products that lower cost, enhance quality, and expand access for marginal populations. Three years into the program, GE had developed 53 such products. One Healthymagination product is the MAC electrocardiogram machine, a portable and affordable cardiac diagnostic device that has extended diagnostic access to rural areas in India, where 70 % of people live and cardiovascular disease is a growing problem” [9].
<i>Redefining Productivity in the Value Chain</i> by increasing company productivity when helping to solve social and environmental problems affecting quality and efficiency in the company operations. This should be reached mainly with better energy use and logistics, lower resource use (e.g. water), optimised procurement and distribution, increasing employee productivity, and careful selection of production location.	“Walmart is reducing transportation costs by working to source produce for its stores locally and by providing training and support to farmers near store locations. In doing so, the company has reduced transportation costs, cutting 100 million miles from delivery routes in the U.S., saving \$200 million in fuel costs. Meanwhile, small and medium farm suppliers have experienced a 10–15 % increase in income. Walmart customers have access to low-cost, healthy food, carbon emissions have decreased” [7].
<i>Enabling Local Cluster Development</i> by improving the operating context influencing the business operations, such as the viability of supporting industries or access to qualified and skilled labour to enhance the business growth.	“In Côte d’Ivoire, the world’s leading cocoa producing country, Mars Incorporated is working with smallholder farmers to reverse a decades-long decline in productivity and quality. The goal is to increase farmers’ yields by three to five times, producing enough cocoa to assure Mars’ growing supply needs and business sustainability while raising living standards in cocoa growing communities. Because the challenges within the Ivorian cocoa sector are too complex to be tackled by the company alone, Mars proactively engaged other stakeholders, including the Ivorian government, the World Bank, bilateral donors, commercial suppliers, certifiers, and non-governmental organizations (NGOs). Since 2010, Mars and its partners have promoted an agricultural productivity package through various Cocoa Development Centers and fostered a network of rural entrepreneurs to sustainably deliver the package to local farmers. The productivity package includes training of farmers in effective cocoa growing techniques and distribution of tools, planting material, crop protection, and fertilizer that will allow farmers to triple their yields” [7].

Porter and Kramer created the list of social issues to be solved by Shared Value business projects: Energy Use, Water Use, Employee Health, Workforce Safety, Employee Skills, Supplier Access and Viability, Environmental Impact [12]. However, they did not stress any

particular region in the world as the main intended recipient of the future Shared Value business projects.

As Shared Value is relatively newly defined concept, it is worth to monitor and evaluate its projects and their results. This paper focuses on the comparative analysis of the regions, with special attention of their attractiveness for Shared Value projects. And cross comparison of the regions and the social issue solved is uncovered. The research questions are following:

- Are any regions more attractive for CSV projects than others? What is the position of Europe? What is the position of Central and Eastern Europe?
- Which kind of social issue is solved mostly by the Global-scale Shared Value projects?

The paper presents own research based on the methodology of Shared value Initiative. Part 2 describes in detail data sources as well as the methodology used. And part 3 consists of the analysis results that show the categorised Shared Value project by the social issues solved, then shows the project distribution across defined regions and finally provides analysis of combining both factors, the social issues and the regions. Part 4 concludes the whole paper.

Methodology explanation. The Shared Value projects were identified and analysed based on the database of the Shared Value Initiative. The Initiative was launched as a Clinton Global Initiative Commitment with support of Mark Kramer and Michael Porter, founders of idea of the Corporate Shared Value. Mark Kramer is Founder and Managing Director of FSG, a leading U.S. non-profit organization management consultancy, and Michael Porter is a Harvard Business School professor. The Shared Value Initiative brings together companies and individuals that are persuaded in vitality of Shared Value concept. The projects described and data provided in the database are on a voluntary basis. However, the author of this article envisages the members to be the relevant companies practicing Shared Value concept in their businesses and hence publishing all their successful implemented projects in this database.

The Shared Value Case Examples database covered 164 implemented Shared Value projects in April 2016. Author of this article analysed each project along the Social Issue focus and the regional placement. Many CSV projects solve more than one social issue. Hence, one project may be represented multiple times in detailed analysis. Comparative research, specifically cross-regional comparisons were used as a data analysis method.

The database defines eleven types of Social Issues defined by the list of SVI, where the Shared Value concept is implemented:

- Climate Change and Environment: projects focus on minimising of impact on environment
- Disaster Preparedness, Response and Relief: projects aim at increasing people safety or their relief after the disasters
- Education, including Workforce Development: projects offering special educational offers that meet abilities and needs of particular population segments or communities, e.g. to increase literacy or acquisition of special needed knowledge or skills
- Financial Inclusion: projects try to offer tailor made financial products for unserved communities, e.g. microfinancing for people at the “Bottom-of-the-Pyramid”
- Gender Equality: projects try to equalise access of both genders to resources, mostly in financial, health or educational areas
- Global (Community) Development: projects aim to improve the living conditions of unprivileged communities, e.g. by providing job opportunities, mostly connected with training, microfinancing, coaching, etc.

- Health and Nutrition: projects solve better access to health care and nutrition, mostly for unprivileged or vulnerable segments of population, e.g. poor children, pregnant women, etc.
- Human Rights: projects aim at improvement of human rights, e.g. or protect human rights in company operations
- Poverty: projects trying to reduce poverty
- Water: projects aim to save water usage or preserve water resources from pollution
- Others: any other projects trying to solve pressing social issue that is not listed above.

In terms of regional placement, the database divides world into eight discrete regions plus using also category Global-scale; the discrete regions are: Africa, Asia, Australia, New Zealand and South Pacific, Eastern Europe, Russia and Central Asia, Middle East and North Africa, North America, South America, Central America and Caribbean, Western Europe. The category Global-scale represents projects that are of global reach in their implementation scope.

Analysis of results. Among the assessed Shared Value projects according to the social issue targeted, *Global (Community) Development* (46 projects), *Education* (41 projects) and *Health and Nutrition* (41 projects), followed by *Poverty* (26 projects), *Financial Inclusion* (23 projects) are of the highest interest by April 2016. Less attention deserved projects in the areas of *Climate Change and Environment* (19 projects), *Gender Equality* (18 projects), *Others* (14 projects), *Water* (12 projects), *Human Rights* (10 projects), and *Disaster Preparedness, Response and Relief* (9 projects) (Figure 2).

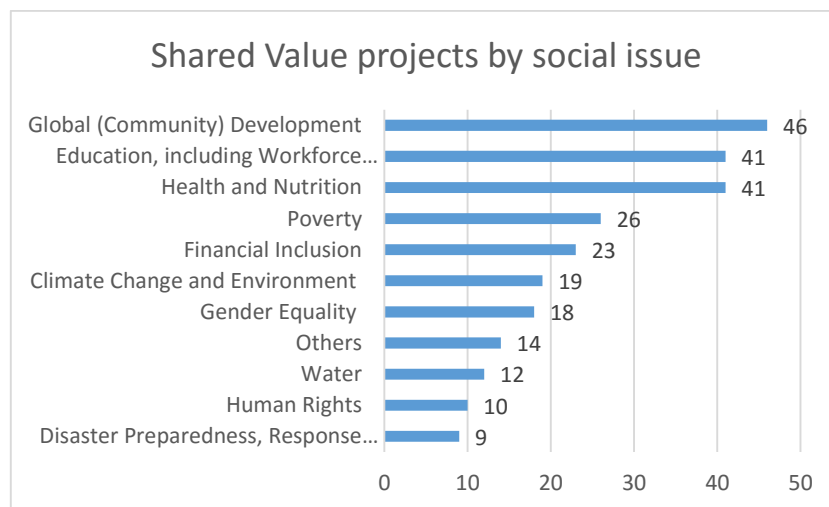


Figure 2. Shared Value projects by the social issue addressed (April 2016)
Source: Author's own analysis from Shared Value Case Examples database (April 2016)

There were significant differences in regional attractiveness for the Shared value projects. In April 2016, the highest attraction displayed regions Global-scale (44 projects, 27 %), South America, Central America and Caribbean (29 projects, 18 %), North America (27 projects, 17 %), then Africa (25 projects, 15 %) and Asia (23 projects, 14%). Regions with low attractiveness were Australia, New Zealand and South Pacific (7 projects, 4 %), Western

Europe (6 projects, 4%), Eastern Europe, Russia and Central Asia (2 projects, 1 %) in April 2016. There were no projects executed in the region Middle East and North Africa. (Figure 3).

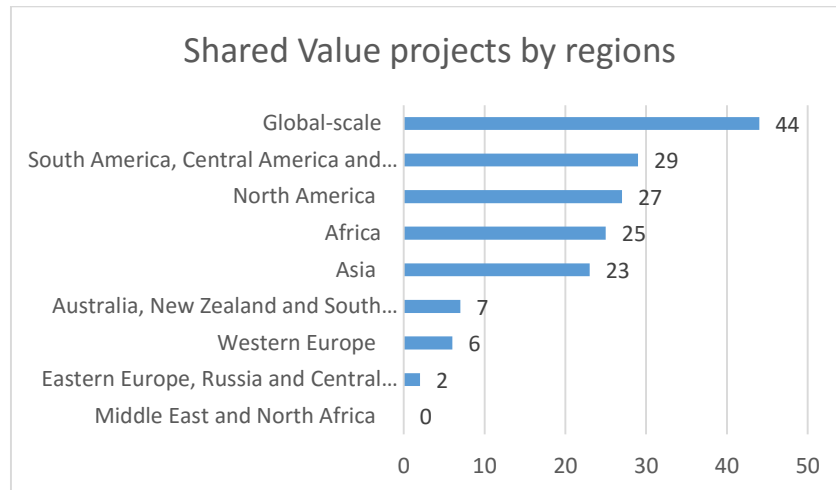


Figure 3. Shared Value projects implemented by geographical region (April 2016)

Source: Author's own analysis from Shared Value Case Examples database (April 2016)

When comparing the Shared value projects implemented by social issue solved and the region, the projects in *Global (Community) Development* were the most frequent (46 projects) where the most projects was attracted to South America, Central America and Caribbean (10 projects), Asia and North America (9 projects), Africa (8 projects), Global-scale (6 projects) by April 2016.

Social issues *Education* and *Health and Nutrition* were the second category of the most solved social issues (41 projects each). *Health and Nutrition* projects happened mainly in region Global-scale (14 projects), Africa (10 projects), followed by smaller numbers in North America (6 projects), Asia (4 projects) South America (3 projects), Western Europe and Australia, New Zealand and South Pacific (2 projects each). The *Education, including Workforce Development* projects were mostly implemented in region Global-scale (12 projects) and South America, Central America and Caribbean (11 projects), followed by North America (7 projects), Asia (5 projects) and Africa (4 projects) by April 2016.

Further frequency of the projects were in social issues *Poverty* (26 projects), *Financial Inclusion* (23 projects), *Climate Change and Environment* (19 projects), and *Gender Equality* (18 projects). *Poverty* social issue projects were mainly realised in region Global-scale (6 projects), equally in Asia, Africa and North America (each 5 projects), followed by South America, Central America and Caribbean (4 projects) and Western Europe (1 project). The social issue *Financial Inclusion* (23 projects) was implemented with equal frequency in the regions Global-scale and North America (each 6 projects), South America (5 projects), less in Asia and Western Europe (2 projects each), and least in Africa and Australia (1 project each). The social issue *Climate Change and Environment* (19 projects) was targeted equally at region Global-scale and South America, Central America and Caribbean (each 5 projects), Asia (3 projects), equally Australia, New Zealand and South Pacific, North America and Western Europe (each 2 projects). Social issue *Gender Equality* (18 projects) was equally solved at

region Global-scale and North America (6 projects), Africa (4 projects), and the least in Asia and South America (1 project each).

Significantly lower interest experienced projects of social issues *Others* (14 projects), *Water* (12 projects), *Human Rights* (10 projects), and *Disaster Preparedness, Response and Relief* (9 projects).

Only projects solving *Global (Community) Development* and *Education* were realised in the region Eastern Europe, Russia and Central Asia. And only project targeting social issue *Global (Community) Development, Health and Nutrition, Poverty, Financial Inclusion, Climate Change and Environment* and *Others* were implemented in Western Europe (Figure 4).

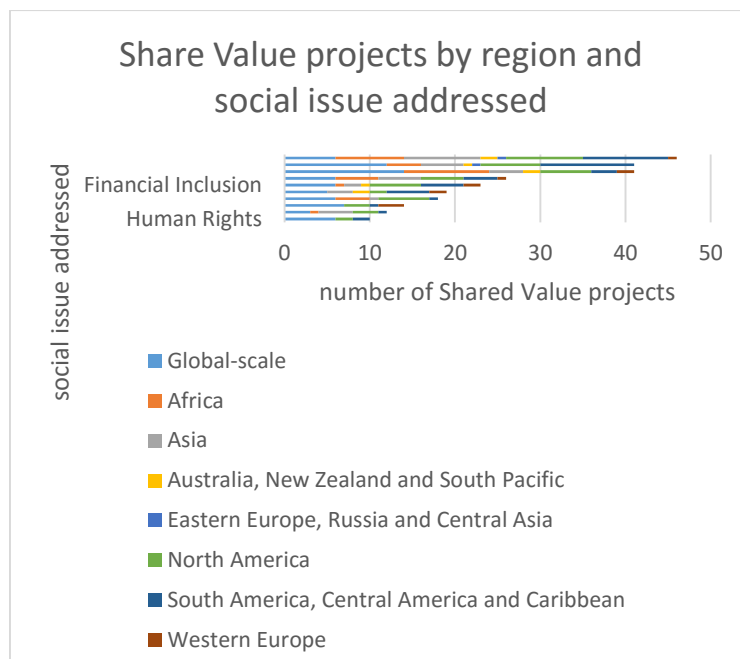


Figure 4. Shared Value projects by region and social issue addressed (April 2016)

Source: Author's own analysis from Shared Value Case Examples database (April 2016)

As the region Global-scale, monitoring projects with the global reach, exhibits the highest absolute number of projects implemented, detailed analysis is provided. When looking closely at social issues solved in this Global-scale region the most frequent were projects in *Health and Nutrition* (19 %, 14 projects), followed by *Education* (16 %, 12 projects) and *Others* (10 %, 7 projects) by April 2016. Then equal attention attracted projects in *Financial Inclusion, Gender Equality, Global (Community) Development, Human Rights* and *Poverty* (each 8 %, each 6 projects). Lower attractiveness experienced projects with focus on *Climate Change and Environment* (7 %, 5 projects), *Disaster Preparedness, Response and Relief* and *Water* (each 4 %, each 3 projects) (Figure 5).

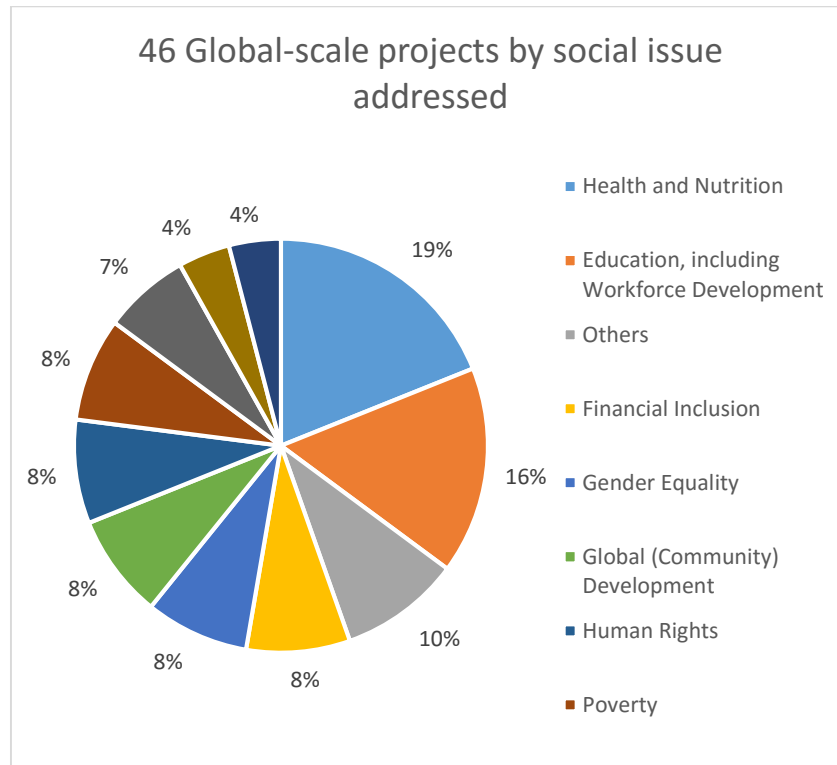


Figure 5. Global-scale Shared Value projects by the social issue addressed (April 2016)
Source: Author's own analysis from Shared Value Case Examples database (April 2016)

Conclusion. The business and social pressures gave birth to idea of Shared Value. Idea that should be able to satisfy both profit creation and address some of pressing social issues. The exclusive SV Case Examples database provided the research data. Within 164 implemented projects around the world, majority focused on the social issues of *Global (Community) Development*, *Education, including Workforce Development* and *Health and Nutrition*.

The first research question tried to find answer whether any regions are more attractive for CSV projects than others. The answer is yes, as the analysed projects show polarization of regions. While several magnetize Shared Value projects, other seem to be overlooked. The biggest attractiveness have projects with the Global-scale reach. More specific regions, with a certain distance from the Global-scale projects, like South America, Central America and Caribbean, North America, Africa, and Asia are gravitating Shared Value projects, too. The position of the region North America is interesting as being surrounded by regions with more developing than developed countries.

The second research question “What is the position of Europe and particularly the position of Central and Eastern Europe” has answers too. Whole Europe seems to be of low interest for CSV projects. Low interest demonstrated also Australia, New Zealand and South Pacific

region, Western Europe and Eastern Europe Russia and Central Asia, while no interest was in Middle East and North Africa.

The third research question was “Which kind of social issue is solved mostly by the Global-scale Shared Value projects?” The analysis showed that Global-scale projects were of dominant number among implemented and the social issues of *Health and Nutrition* and *Education, incl. Workforce Development*, were the biggest beneficiaries. As these projects are of global reach, it indicates that the spheres of former state governance and control are globally attracting business entities to solve the social issue of the population.

From the perspective of social issues, *Global (Community) Development* social issue is the most often solved one with the focus on all regions around the world. Every other social issue is being solved only in some of the regions.

Only projects solving *Global (Community) Development* and *Education* were realised in the region Eastern Europe, Russia and Central Asia. It creates impression that there are either no social issues to be solved in this region or that this region is at the outskirts of interest of companies implementing their CSV projects.

Further research should analyse reasons why CSV projects are of low interest in regions of Eastern Europe, Russia and Central Asia and of no interest in Middle East and North Africa. The high number of CSV projects implemented in North America, in the comparison with rather developing regions, calls for further investigation and analysis of the projects and context. Also deeper analysis of key enablers of Shared Value projects in regions of their high frequency could be beneficial for wider dissemination of these projects in regions with low occurrence. Hence, there could be benefit for both the region and the companies.

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Сучасна регіональна привабливість проектів спільних цінностей

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Постановка проблеми. Останні десять років показали, що корпоративний акцент виключно на максимізацію прибутку є не найкращою стратегією для довгострокового зростання і стійкості. Тиск з боку стейкхолдерів, а також пошук нових джерел доходів породили створення концепції спільних цінностей Майкла Портера. Ця концепція повинна одночасно забезпечувати створення прибутку і вирішення нагальних соціальних проблем.

Підхід до вирішення проблеми. У статті представлені власні дослідження, що базуються на методології ініціативи спільних цінностей. Методом аналізу даних є порівняльні дослідження, зокрема, міжрегіональні порівняння, а також крос-порівняння регіонів з соціальними проблемами. Були проаналізовані унікальні приклади ініціатив спільних цінностей у вигляді баз даних з описом 164 реалізованих корпоративних проектів по всьому світу, що розглянуті як за географічними регіонами, так і з позиції соціальних питань.

Оскільки поняття «спільні цінності» є відносно новим, варто контролювати і оцінювати свої проекти та їх результати. У даній статті основна увага приділяється порівняльному аналізу регіонів, а саме їх привабливості для проектів спільних цінностей. Проведено перехресне порівняння регіонів, розкрито і вирішено соціальні проблеми. Науково-дослідні питання такі: Чи існують регіони більш привабливі для проектів спільних цінностей, ніж інші? Яка позиція Європи? Яка позиція Центральної та Східної Європи? В основному, які соціальні проблеми вирішуються за допомогою глобальних проектів спільних цінностей?

У статті представлено результати аналізу, щодо соціальних питань, які вирішуються в рамках реалізації проектів спільних цінностей, а також представлені результати щодо регіонального розподілу проектів і, нарешті, подано перехресний аналіз, що враховує, як соціальні та регіональні фактори.

Результати дослідження. В результаті проведеного аналізу виявлено певний розподіл регіонів. Проекти спільних цінностей у більшій мірі реалізуються на глобальному рівні, у Південній та Центральній Америці, країнах Карибського басейну, Північній Америці, Африці та Азії. На решті території такі проекти не знаходять підтримки. З точки зору вирішення соціальних питань, більшість проектів орієнтовані на розвиток громад, освіти, включаючи розвиток трудових ресурсів, здоров'я і харчування.

З точки зору вирішення соціальних питань, питання розвитку громад є одним із найбільш часто вирішуваних у всіх регіонах по всьому світу. Вирішення будь-яких інших соціальних проблеми приділяють уваги тільки в деяких регіонах.

Зузана Кречкова.

Сучасна регіональна привабливість проектів спільних цінностей

Перше питання дослідження стосувалося того, чи є країни, які найбільш приваблюють проекти спільних цінностей, порівняно із іншими. Відповідь: так, оскільки аналіз проектів показав певний розподіл регіонів. В той час, коли в деяких регіонах проекти спільних цінностей реалізуються, в інших регіонах ні. Найбільш привабливими є проекти глобального масштабу. Деякі специфічні регіони, такі як Південна Америка, Центральна Америка, країни Карибського басейну, Північна Америка, Африка та Азія також тяжіють до проектів спільних цінностей. Щодо Північної Америки, то цей регіон оточений країнами, що розвиваються і розвиненими країнами.

Друге питання дослідження – "Яка позиція Європи, а особливо країн Центральної та Східної Європи?". Європейські країни майже не цікавлять проекти спільних цінностей. Низький інтерес продемонстрували також Австралія, Нова Зеландія, країни південної частини Тихого океану, Західної і Східної Європи, Росії і Центральної Азії, і зовсім ніякого інтересу не було з боку країн Близького Сходу і Північної Африки.

Третє питання – "Яка соціальна проблема вирішується в основному проектами спільних цінностей глобального рівня?" Аналіз показав, що в основному були реалізовані проекти глобального рівня, а особливо увагу привернули проекти, направлені на вирішення *соціальних питань*, проекти у сфері *здоров'я, харчування та освіти*, а також проекти щодо *розвитку трудових ресурсів*. Оскільки ці проекти мають глобальний характер, це свідчить про те, що органи державного управління на глобальному рівні залучають бізнес для вирішення соціальних проблем населення.

Тільки проекти, направлені на вирішення питань *розвитку громад і освіти* були реалізовані в Східній Європі, Росії та Центральній Азії. Із 164 проектів лише два були реалізовані в цьому регіоні. Створюється враження, що або немає ніяких соціальних проблем, які необхідно вирішити в цьому регіоні, або цей регіон не цікавить компанії, що реалізують проекти спільних цінностей.

Ключові слова: корпоративна соціальна відповідальність, загальні цінності, зацікавлена сторона, акціонер, соціальні проблеми.

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Современная региональная привлекательность проектов общих ценностей

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Последние десять лет показали, что корпоративный акцент исключительно на максимизацию прибыли является плохой стратегией для долгосрочного роста и устойчивости. Давление со стороны стейкхолдеров, а также поиск новых источников доходов породили создание концепции общих ценностей Майкла Портера. Эта концепция должна одновременно обеспечивать создание прибыли и решение насущных социальных проблем. В статье представлены собственные исследования, основанные на методологии инициативы общих ценностей. В качестве метода анализа данных были использованы сравнительные исследования, в частности, межрегиональные сравнения, а также кросс-сравнение регионов с социальными проблемами. Были проанализированы уникальные примеры инициатив общих ценностей в виде баз данных с описанием 164 реализованных корпоративных проектов по всему миру, рассмотренные как по географическим регионам, так и по социальным вопросам. Анализ показывает поляризацию регионов. В то время как в ряде регионов преобладают проекты общей ценности (в глобальном масштабе, Южная Америка, Центральная Америка и Карибский бассейн, Северная Америка,

Африка и Азия), остальная часть мира, кажется, не замечает этого. С позиции решения социальных вопросов большинство проектов ориентированы на глобальный уровень (общества в целом) развития, образование, в том числе развитие трудовых ресурсов, на здоровье и питание.

Ключевые слова: корпоративная социальная ответственность, общие ценности, заинтересованная сторона, акционер, социальные проблемы.

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