

## SOCIAL WELFARE AS A FACTOR OF SUSTAINABLE DEVELOPMENT

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**Abstract.** *The purpose of the article is to develop approaches to establishing the relationship between «sustainable development,» «well-being,» and «social welfare» in the economy of Ukraine based on a value-oriented approach. The research used induction, deduction, analysis, synthesis, comparison, inference, generalization, and abstraction methods. The results of the scientific research showed that it is worth considering the interrelationships between sustainable development and the social welfare of society. It is noted that social welfare involves human communication both in the process of professional activity and outside of it. It depends on interaction, respect for a person's needs and preferences, and awareness of one's identity. The evolution of welfare depends on the change in the types of society given. It has been established that welfare is achieved through growth, determined by knowledge and level of education, the new role of science and technology, information technologies, and synergistic systems in the information society. It was established that values characterize social welfare. It was determined that Ukrainian society implements such values as preservation and self-affirmation, traditionality, and survival. However, to achieve sustainable development goals, it is also necessary to emphasize the values of openness to change, self-transcendence, secular-rational, and self-expression values. The relationship between social welfare and sustainable development based on value-oriented principles is defined. It is based on the interrelationship of welfare and information, the absence of guarantees for rapid growth through implementing sustainable development goals, and the separation of the economy, the environment, and social institutions for implementing sustainable development goals.*

**Keywords:** *the evolution of social welfare, well-being, sustainable development, interconnection, values, society types.*

**Statement of the problem.** The world community is developing the approaches of a new paradigm, which is based on the concept of «sustainable development.» By this, it is worth considering a global strategy for humanity's survival, which contains relationships between man and nature in all spheres of activity. Such a concept should be based on the model of

extensive reproduction and attaches great importance to social protection, product quality, and environmental protection. In general, sustainable development through social welfare provides not quantitative changes in economic growth indicators but qualitative changes in equipment, technologies, and management methods. This is achieved by establishing a balance between the needs of past and future generations in economic well-being, environment, and social welfare.

Society perceives welfare differently. This perception can be subjective and objective. It is subjective to depend on the worldview, psychological characteristics, upbringing, environment, religious beliefs, and formed communication culture. Objective perception is based on criteria for assessing the level of welfare. The main criteria include quality of life index, purchasing power index, pollution index, housing cost ratio to population income level, cost of living index, safety index, health care index, traffic index, climate index, etc. Thus, social welfare is the factor that determines the trajectory of sustainable development and contributes to the development of the entrepreneurial system not only for an individual business or community but also for the territory, region, or state in general. It determines the sustainable development of society.

**Analysis of recent research and publications.** Researchers have paid considerable attention to social welfare and sustainable development. In particular, A. Maslow is one of the most famous American scientists who founded the theory of public welfare. The theory is based on the «pyramid of needs» or «Maslow's pyramid». In it, each acts according to his capabilities and needs. This enables him to achieve self-realization. This concept concludes that it is impossible to identify and achieve higher needs unless the lower-priority needs of the individual and society in general are achieved [1]. F. Herzberg developed a two-factor psychological model of needs based on motivation and need factors [2]. Need factors describe the employee's environment and are a function of job dissatisfaction (salary, working conditions, social status, interpersonal relationships in the team, organization and management policies, degree of control over work), and motivating factors motivate employees to perform better (success, promotion, approval of work results, degree of responsibility, growth opportunities). K. P. Alderfer proposed a three-level model of «existence – relatedness – growth» [3]. This theory is distinct from Maslow's theory. The essence lies in that progression within the hierarchy can occur both from the bottom up and from the top down. Moreover, the degree of satisfaction of a higher-level need does not affect advancement to a higher level. From the need for «existence,» one can immediately move to the need for «relatedness,» bypassing «growth.» However, career growth may slow down, and your primary need may become relationships with people rather than development. O.O. Demidiuk asserts that the quality of life is a subjective-objective measure of personal perception and satisfaction. Its components include physical, psychological, social, and functional aspects. Based on an analysis of the methodology employed by the world database Numbeo regarding the quality of life index in Ukraine, it is concluded that Ukraine lags behind Poland and the Czech Republic by 30% across all these components [4].

O.M. Martyniuk, A.M. Aliluiko, and V.O. Yeromenko developed models for the social aspects of sustainable development, including models for child poverty, adolescent

underachievement, and the assessment of income inequality within the population. They concluded that building an ideal model is impossible due to the uncertainties in various model components. This challenge is particularly pertinent to models that describe complex ecological and social systems, where only qualitative and imprecise information is often available. Therefore, it is advisable to employ various modeling methodologies to address sustainable development challenges, analyze and forecast its key indicators, and obtain reliable and trustworthy results [5, p. 8].

In order to achieve sustainable development, the social welfare must be ensured. A. Toynbee developed a model of sustainable development that includes a «challenge-response» framework. Both positive and negative challenges impact society. Positive challenges serve as stimulating factors, but they exhibit social instability in their outcomes and lack self-development mechanisms. In the substantive part of the «response,» reliance on resources, human resources, and the population's quality of life is essential [6; 7].

M. Munasingha developed a model of sustainable development based on three components: economic (efficiency, growth, stability), ecological (biodiversity, resource conservation, pollution reduction), and social (poverty reduction, cultural development, heritage preservation). This model uses three capitals: the capital of current and future generations and the formation of new values. The welfare of the existing generation is grounded in considering social and economic factors while ensuring the welfare of future generations relies on social-ecological development. At the intersection of these components, new values of sustainable development are shaped [8]. G. Daly depicted a model of sustainable development in the form of a hierarchical triangle. At the bottom level, there is the natural environment («unconditional resources»); at the middle level are economics, technology, politics, and ethics; and at the top level is the social welfare of the population («unconditional values»). Daly advocated the idea of a steady state. According to this concept, the population should be proportional to the level of capital. The physical size of capital remains constant, but its quality should improve [9].

J. Pezzi developed a model of intergenerational capital, adhering to the principle of maintaining welfare over an extended period. In this model, the accumulated capital from one generation to the next should not diminish. Any temporary reduction is considered a sign of unsustainable development. However, this model includes a principle of viability, allowing for a reduction in welfare as long as the level of consumption remains above a certain subsistence minimum. A specific case is that consumption, rather than utility, should remain constant or increase over an extended period [10].

D. Pearce, E. Barbier, and A. Markandya developed a model of soft sustainable development, according to which natural nature can be replaced by artificial man-made, provided that equal opportunities are achieved for current and future generations [11].

L.G.Lipych, M.A. Kushnir, and O.A. Khilukha outlined approaches in behavioral economics that can ensure sustainable development. They established that the development of future enterprises requires unconventional management methods, which are built on horizontal social relationships where employees are considered equals, regardless of their role's importance within the company, rather than traditional hierarchical relationships of «superiors-

subordinates.» Research allows for a better understanding of humans as biological beings, which, in turn, aids in choosing appropriate management tools that focus on employees' actual behavior, not just idealized behavior. Exploring human nature, especially the significance of emotions, can enhance the efficiency and effectiveness of activities [14].

O.M. Polinkevych, R.Kaminski, I.Khovrak, and V.Trynchuk analyzed the formation of sustainable business development in the world and Ukraine. The COVID-19 pandemic has introduced new threats to sustainable development, such as increased disease and mortality rates from infectious diseases, school closures, rising unemployment, slowing down of tourism, environmental issues, increased urbanization, growing domestic violence and discrimination, as well as the closure and prohibition of bankruptcy for small businesses [15; 16; 17; 18].

In general, the key to achieving prosperity lies in meeting human needs.

B. Jordan in his book «Welfare and Well-being: Social Value in Public Policy» noted that research on well-being shows the importance of personal relationships, trust, and participation to support the quality of life, but it is the economic model that remains the dominant basis for political and social institutions and politicians. A glorious attempt to maximize well-being backfires on its achievement. The quality of personal experience, and limitations necessary for the well-being of society. Therefore, it is better to focus on cultures and institutions than to regulate social relations by the state [32].

D. Taylor notes that Well-being is increasingly supplanting welfare as a central political goal for social and public policy. The view of well-being and welfare is mutually constitutive. Instead of being concerned with outcome measures such as happiness, he offers a view of well-being as a process that varies depending on the context through the notion of 'thick' and 'thin' needs. This approach promotes the emergence of individualized and managed markets and suggests what relationships and contexts create individual well-being and welfare [33].

While acknowledging the significant contributions of most researchers, it is worth noting that the relationships between «sustainable development», «well-being», and «social welfare» and the impact of these processes on overall societal well-being often remain overlooked.

**Statement of the task (formulation of the article's goals).** Develop approaches to establishing the relationship between «sustainable development», «well-being» and «social welfare» in the economy of Ukraine based on a value-oriented approach.

**Presentation of the main research material.** Social welfare is indeed a vital component of overall social welfare. The latter encompasses physical, mental, and financial welfare. However, social welfare serves as the foundation for ensuring businesses' sustainable growth and society's sustainable development. It includes factors such as access to education, healthcare, social support, social equity, and a sense of community, all of which are integral to a thriving and sustainable society.

Social welfare involves human communication both in the process of professional activity and outside of it. According to research by Harvard Business Review, employees who have friends at work work 7 times more productively [11]. Thus, social welfare affects productivity. Social welfare depends on interaction the level of respect for a person's needs and preferences, and awareness of one's own identity.

The perception of welfare can indeed differ significantly in different types of society due to their characteristics, development, and values. Here, for example, are some key features of the perception of welfare in different types of society:

**Agrarian society:** In traditional agrarian societies where farming and agriculture play an important role, perceptions of welfare can be strongly linked to tillage performance, yields, and access to land. People can concentrate more on their agricultural achievements.

**Industrial society:** In societies where the industrial sector plays an important role, the perception of welfare can be related to the level of employment in industry, the production of goods, and access to productive resources.

**Information society:** In post-industrial or information societies, where information and technology are important, the perception of welfare can be related to access to information, the development of the Internet, information literacy, and innovative activity.

**Technotronic society:** In a digital society where technology affects all aspects of life, perceptions of welfare may include access to modern technology, digital infrastructure, and internet services.

**Transformational society:** Societies in the stage of transformation can perceive welfare through the prism of changes, reforms, and transformational processes. The concept of sustainable development can be important considering environmental, social, and economic aspects.

The perception of welfare can also be influenced by cultural, historical, and other factors characteristic of a particular society. Such differences in the welfare perception should be considered when developing development policies and strategies in different types of society. «Welfare» or «well-being» pertains to the overall state that emphasizes happiness and satisfaction, although it also includes a person's standard of living in a financial or material sense. In this sense, «welfare» often pertains to the state of an entire country or economy, sometimes emphasized with the phrase «social welfare». «Well-being» in the sense of happiness and satisfaction is easier to imagine than to analyze or measure thoroughly. Economists have coined specialized technical terms for happiness for many years, including utility, satisfaction, preferences, tastes, indifference curves, welfare, and well-being. «Social welfare» refers to a complex set of measures and actions aimed at satisfying the needs of society's members. Its goal is to improve social, economic, and human conditions by protecting individuals against poverty, illness, unemployment, disability, or issues arising from old age. «Well-being» is a different concept altogether. This is the totality of the well-being or utility of individual members of society. It includes positive emotions, physical health, meaningful social relationships, and connections [34]. It makes an individual feel authentic and valued in society, creating a sense of connection and belonging to a culture. In Tables 1 and 2, we will present the perception of welfare by different types of society according to the method of obtaining means of livelihood. Sociologist D. Risman singled out traditional, industrial, and post-industrial [30]. D. Bell introduced the term post-industrial society and proposed characteristics that distinguish it [27]. The Japanese scientist I. Masuda introduced the term information society because the technical basis of modern society is information [28; 29].

Table 1

**The evolution of social welfare according to the method of obtaining means of subsistence (according to sociologists D. Risman, D. Bell, I. Masuda)\***

Type of society	Features	Social welfare
Traditional (agrarian)	<ol style="list-style-type: none"> <li>1. Agrarian orientation.</li> <li>2. Dependence on natural conditions.</li> <li>3. Conservatism in social relations.</li> <li>4. Orientation to the established order, not to development.</li> <li>5. Persistence of norms and customs.</li> <li>6. Dependence on social groups and social control.</li> <li>7. Limitation of individual freedom of the individual</li> </ol>	Compliance with norms and traditions in society, lack of innovation
Industrial (industrial, technogenic)	<ol style="list-style-type: none"> <li>1. A new system of values based on science, technology and technology. They are a novelty.</li> <li>2. The idea is the transformation of the world and the subjugation of nature by man.</li> <li>3. The leading values are power, strength, struggle, domination over nature.</li> <li>4. The cult of utility and focus on owning goods.</li> <li>5. The economy, which is oriented towards the production of goods</li> </ol>	Prosperity is achieved through growth. Updates and progressive development
Post-industrial (informational, super-industrial, «third wave» society, technotronic, post-economic, transformational)	<ol style="list-style-type: none"> <li>1. Culture-centricity (increasing the role of man).</li> <li>2. Transition to a service- and information-oriented economy.</li> <li>3. Science is the productive force of society.</li> <li>4. Division according to professional characteristics</li> <li>5. Creation of intelligent technologies.</li> <li>6. Dominance of post-materialist values</li> </ol>	The welfare of society is determined by knowledge and the level of education, the new role of science and technology, information technologies, synergistic systems

\* Compiled by the authors [19; 20; 21; 27; 28; 29; 30]

Table 2

**The evolution of the social welfare in relation to religion\***

Type of society	Features	Social welfare
Secular	<ol style="list-style-type: none"> <li>1. Short-sightedness, indolence, focus on one's goals and needs.</li> <li>2. Justice is understood as obtaining benefits for a person.</li> <li>3. Vertical mobility in society.</li> <li>4. Environmental problems due to high intensity of farming</li> <li>5. Household social utopias.</li> <li>6. Excessive faith in NTP.</li> <li>7. Belief in the ability to radically change the situation through the protest movement.</li> <li>8. Lack of awareness of individual responsibility to society and the environment</li> </ol>	The welfare of society and the individual are identified.
Traditional (religious)	<ol style="list-style-type: none"> <li>1. All benefits are obtained from available resources.</li> <li>2. People demonstrate resilience in overcoming difficulties and shortages.</li> <li>3. Belief in religion.</li> </ol>	Minor demands are placed on welfare

\* Compiled by the authors [19; 20; 21]

Much debate surrounds the understanding of welfare in secular and traditional societies. A secular society contains a system of beliefs, ideas, and actions aimed at removing religion and the church from the life of society. Secularism is not synonymous with atheism, but it is primarily atheists and agnostics who are essential for devaluing and eliminating Christianity from the public sphere. Many social phenomena and processes that could not function without religion in the past are now much better performed by the secular society armed with science [20]. In such a society, the perception of welfare is characterized by a painful and impatient attitude towards deteriorating living conditions. This arises due to increasing needs, a high level of urbanization, the dependence of tastes and preferences on the environment, a rejection of the social system, and a strong desire to achieve a high level of prosperity. The result of this can be the formation of social utopias (imbalances between labor efforts and rewards, ignoring ecological and economic laws, and aggressive attitudes towards religion). A secular society exists today. According to R. Inglehart, throughout most of history, humanity's priority was survival, which emphasized values such as group solidarity, traditionalism, intolerance of differences, and submission to strong leaders [22]. Modernization, economic development, and security, which were established in many countries after World War II, led to a shift towards secular-rational values and self-expression values: a reduction in the influence of religion and authoritarian leaders, the spread of democracy, tolerance, gender equality, and more. All of this contributes not only to economic growth but also to an increase in happiness. In 1981, the World Network of Sociologists conducted a study of world values. There are six waves in total. This study was designed to test the hypothesis that economic and technological change transforms the core values and motivations of the public in industrialized societies. The results of the first wave of surveys point to the conclusion that generational changes are taking place in core values related to politics, economic life, religion, gender roles, family norms, and sexual norms. In 1990-1991, a second wave took place, which examined the fact of changes in the values of younger generations from older generations in those societies where there was rapid economic growth and the factors that caused them. In 1995–1997, the third wave of values research analyzed the cultural conditions of democracy. In 1999-2001, African and Islamic societies were highlighted. It was the fourth wave. The fifth wave was conducted in 2005–2007, and the sixth wave in 2011–2012. According to the sixth wave of research, secular-rational values, and self-expression values are most characteristic of countries like Sweden, Norway, and Denmark – and they happen to be at the top of the most economically developed and happiest countries. The value and cultural field of Ukrainian society is characterized by a conflicting and very slow departure from post-Soviet orientations in areas such as state and political structure, the economy, interpersonal relationships, the legal system, and more. Ukraine has declared a European path of development [22]. Another survey was conducted in 2020 (seventh wave). Political scientists Ronald Inglehart and Christian Welzel point out that there are two main dimensions of intercultural change in the world: traditional values versus secular-rational values and survival values versus self-expression values [31].

Thus, the main values that are the basis of social welfare in the modern information society in conditions of sustainable development according to the methodology of Schwartz (1-4) and the methodology of Inglehart and Welzel (5-8) should be:

- 1) values of self-affirmation – social and material status, power over others, personal movement;
- 2) values of openness to change – independence of thoughts and actions, novelty and satisfaction with life;
- 3) values of self-transcendence – quality of life, welfare for all people, respect for others, human dignity;
- 4) conservation values – safety and stability of society, preservation of traditions and rules accepted in society;
- 5) secular-rational values – rational justification, achievements, worldliness;
- 6) survival values – survival, material goods, safety, care;
- 7) values of self-expression – dignity, human rights and freedoms, intangible goods;
- 8) traditional values – tradition, belonging to a group, proven decisions.

The study [24] states that Ukrainian society falls into the quadrant of conservation and self-enhancement values according to Schwartz's methodology (European Values Study) and tradition and survival values according to Inglehart and Welzel's methodology (World Values Survey). In general, 96% of organizations worldwide believe that welfare programs are the responsibility of the organization, and 78% of organizations worldwide state that ensuring the welfare of employees is one of the drivers of organizational effectiveness [25]. The main areas influenced by the level of employees' social welfare in organizations around the world are [26]:

1. Employee experience.
2. Market reputation.
3. Customer experience.
4. Financial results.
5. Innovation and adaptability.

These factors highlight the significance of social welfare in organizations and its impact on various aspects of organizational performance and reputation.

The relationship between social welfare and sustainable development based on values-oriented principles is grounded in the following:

1. Since sustainable development is achievable in the context of an information society, the interplay between welfare and information depends on the timeliness of obtaining reliable information. Information can be acquired instantly or may require deeper research to draw conclusions.
2. Implementing the concept of sustainable development will not guarantee rapid growth in people's social welfare. Instead, it will require concerted efforts from policymakers, leaders, scientists, and the entire progressive population of Ukraine.
3. In the modern world, previously separate spheres such as the economy, the environment, and social institutions began functioning in isolation. As a result, the natural basis of existence and the inner world of human beings began to deteriorate. Such a society essentially lived at the expense of future generations. Consequently, in the early 21st century, the world faced global ecological problems, hunger, impoverishment of the majority of the Earth's population, moral degradation, the rise of regional and ethnic conflicts, terrorism, and a decline in social welfare.



4. The connection between the environment (the ecological vector) and the economy (the economic vector) is «viable». This refers to a state where the environment provides natural resources that are useful and vital for the economy over the long term. To ensure that the economy remains sustainable and beneficial for future generations, natural resources must be used and managed properly, in other words, sustainably. «Life» exists at the intersection of the «ecological» and «social» vectors. A healthy environment provides food, clean water, fresh air, shelter, and job opportunities for society, creating an environment in which we can live. It is essential to note that all decisions made by society will determine the future of this environment. Ultimately, «justice» joins the «social» and «economic» vectors. With economic management and a sustainable economy, all members of society can have fair incomes, long-term jobs, and quality goods and services. It should be noted that it is the members of society who decide how to distribute wealth and balance inequalities.

**Conclusions and prospects for further research.** Considering the above, it is worth noting that welfare is the foundation of sustainable development. The concept of social welfare is based on a purpose that should be fulfilled by society and individuals. Achieving a comprehensive approach to sustainable development is possible by developing measures to increase social welfare in society and other components of welfare, including mental, physical, and financial. All these aspects are interconnected and directly influence each other. A crucial element of social welfare is the values that underpin it. Ukrainian society realizes values such as preservation and self-assertion, based on Schwartz's methodology (European Social Survey), and traditionality and survival, based on Inglehart and Welzel's methodology (World Values Survey). However, to achieve the goals of sustainable development, it is necessary to develop measures that contribute to the society's development strategy and the enhancement of welfare. It must emphasize values such as openness to change, self-transcendence, secular-rational values, and self-expression to move toward sustainable development.

Society has evolved from traditional (agrarian) to industrial (information, post-industrial, third-wave, technetronic, post-economic, transformational) forms throughout history. In this evolution, welfare was often viewed as adhering to societal norms and traditions, characterized by the absence of innovations, growth, ensuring renewal, and progressive development. The welfare of society is increasingly determined by knowledge, education, the role of science and technology, information technology, and synergistic systems.

Secular society is present today and is characterized by secular values. This approach is typical of countries like Sweden, Norway, and Denmark. According to this perspective, the welfare of society and the individual are closely linked. The relationship between social welfare and sustainable development is grounded in the interplay of welfare and information, the absence of guarantees for rapid growth through the implementation of sustainable development goals, and the interconnection of the economy, environment, and social institutions in achieving those goals. Future research prospects include the development of a strategy for social welfare in the context of sustainable development.

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**СОЦІАЛЬНИЙ ДОБРОБУТ ЯК ЧИННИК СТАЛОГО РОЗВИТКУ****<sup>1</sup>Оксана Полінкевич, <sup>2</sup>Олена Кузьмак, <sup>3</sup>Ришард Камінські**

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**Анотація.** Метою статті є розробка підходів щодо встановлення взаємозв'язку між «сталим розвитком», «добробутом» та «соціальним добробутом» в економіці України на підставі ціннісно-орієнтованого підходу. У дослідженні використано методи індукції, дедукції, аналізу, синтезу, порівняння, умовиводу, узагальнення, абстракції. Результати дослідження показали, що варто враховувати взаємозв'язки сталого розвитку та соціального добробуту суспільства. Зазначено, що соціальний добробут передбачає спілкування людини як у процесі професійної діяльності, так і поза нею. Він залежить від взаємодії і рівня поваги потреб та преференцій людини, усвідомлення власної ідентичності. Подано еволюцію добробуту залежно від зміни типів суспільства. Встановлено, що добробут досягається через зростання, визначається знаннями і рівнем освіти, новою роллю науки і техніки, інформаційних технологій, синергетичних систем за інформаційного суспільства. Констатовано, що соціальний добробут характеризується через цінності. Визначено, що українське суспільство реалізує такі цінності як збереження і самоствердження та традиційність і виживання. Проте, щоб досягти цілей сталого розвитку додатково потрібно акцентувати увагу на цінностях відкритості до змін, самотрансцендентності, секулярно-раціональних та цінностей самовираження. Визначено взаємозв'язок соціального добробуту та сталого розвитку на ціннісно-орієнтованих принципах. Він ґрунтується на взаємозв'язку добробуту та інформації, відсутністю гарантів щодо швидкого зростання через реалізацію цілей сталого розвитку, роздільності економіки, довкілля та суспільних інститутів для реалізації цілей сталого розвитку.

**Ключові слова:** еволюція добробуту, соціальний добробут, сталий розвиток, цінності, типи суспільства.