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STRATEGIC MODEL OF ENSURING SOCIO-ECONOMIC SECURITY OF ENTERPRISES IN THE CONTEXT OF INNOVATIVE DEVELOPMENT

ABSTRACT

The problem of guaranteeing the socio-economic security of enterprises is of particular importance in the context of innovative development, which is determined by the high pace and dynamics of technological, market, and social transformations. This is a period of increased vulnerability and instability of enterprises, since innovative development can be accompanied by unpredictable organizational and social consequences. In this context, it has been proven that the socio-economic security of an enterprise is equivalent to its stable and productive functioning, preservation of its identity, and is the basis for the full realization of its mission.

The purpose of the study is to create a strategic model for ensuring the socio-economic security of enterprises and to develop, on this basis, a methodological approach aimed at progressively increasing the level of socio-economic security of the enterprise on the basis of innovative development.

The theoretical and methodological basis of the study was a number of scientific ideas and concepts: the views of scientists on the essence and content of socio-economic security of an enterprise, a systematic approach to economics, the concept of hierarchical levels of economic security, the concept of components and levels of socio-economic security of enterprises, and the concept of innovative potential of enterprise personnel.

A universal model for ensuring the socio-economic security of enterprises in the context of innovative development has been created, which can be used to create a safe socio-economic space at enterprises of various types and content of activities. The model defines the strategic goals of ensuring socio-economic security, which constitute its substantive core, and also sets criteria and indicators of efficiency of the organization of the safe environment of the enterprise, which form the basis of a methodological approach to assessing the state of its provision. It is proven that the socio-economic security of an enterprise should be considered and ensured in an inseparable connection with its innovative development.

Keywords: social security, economic security, material integrity, energy balance, information orderliness, social protection, innovative potential, corporate culture, labor motivation

JEL Classification: C50, C51, D20, E23

INTRODUCTION

At the current stage of global economic development and rapid technological progress, the importance of innovative development for enterprises is becoming a key factor in ensuring their competitiveness and sustainable development. The ability to adapt to new trends and introduce innovative technologies is a strategic advantage for enterprises of any type and industry. In the context of innovative development, when technological, market, and social transformations are characterized by a high pace and dynamism, the socio-economic security of enterprises is of particular importance. Sustainability of the financial position, absence of risks, and ensuring conditions for efficient operation are becoming fundamental aspects of successful business activity.

A favorable innovation environment requires enterprises to improve their strategic management models in order not only to survive but also to actively participate in shaping the innovation landscape. In the process of scientific development of the issues related to ensuring the socio-economic security of modern enterprises, it is important not only to identify problems and challenges, but also to propose specific solutions and recommendations for the development and implementation of strategic management models that can be implemented in the form of a strategic model for ensuring the socio-economic security of an enterprise. The problem of developing effective strategic models for ensuring socio-economic security is of particular relevance, given that socio-economic security determines the optimal balance between innovation and stability, taking into account the social requirements and needs of labor entities. Research on this topic is very timely, as it will reveal the key aspects of strategic management necessary to ensure the security of enterprises in the face of the newest economic changes. The creation and analysis of a strategic model for ensuring the socio-economic security of modern enterprises will allow the formation of a new methodological approach aimed at improving the level of security, which will contribute to the sustainable development of enterprises in the context of constant innovative changes.

The expediency of using the modeling method as a multidimensional tool that reliably reproduces certain aspects of economic fullness in the richness of their external and internal laws in the context of highlighting the issues of improving the level of socio-economic security of modern enterprises is due to the fact that the structure and nature of the enterprise's functioning, as well as the phenomenon of its socio-economic security are characterized by multidimensionality, systematicity and polydeterminism, which makes it impossible to use linear, one-dimensional methods.

Consideration and scientific substantiation of a strategic model for ensuring the socio-economic security of enterprises in the context of innovative development goes far beyond a simple adaptation approach. Modern enterprises should take into account not only technological challenges but also the impact of innovations on the social sphere and employment. In this context, strategic management is key to maintaining a balance between innovation activity and ensuring stability in the social environment of the enterprise. The need to develop a strategic model is also due to the fact that innovative development is often accompanied by ambiguous social consequences, such as changes in employment, social inclusion, and income distribution. The optimal implementation of innovations requires careful consideration of the social aspects of the operation of enterprises; otherwise, it can lead to an imbalance of equity and, as a result, to social tensions. In this case, it is important to pay attention to different levels of the enterprise's functioning, including its external impact at the level of the community, region, and the state as a whole. Therefore, interaction between different enterprises, the public, and the authorities is an important aspect of creating a safe environment in terms of enterprise functioning in the context of innovative development. The ideal scenario of such interaction is accompanied by the creation of a favorable environment for innovative development that takes into account the interests of all stakeholders.

Thus, the socio-economic security of an enterprise can be identified with its sustainable, stable, and productive functioning, subjectivity, and the full realization of its mission. The scientific substantiation and development of a strategic model for ensuring the socio-economic security of enterprises in the context of innovative development is an indispensable part of the modern high-tech economic reality focused on creating a sustainable and economically efficient society.

LITERATURE REVIEW

Socio-economic security has been a subject of long-standing academic attention within both macroeconomic and microeconomic disciplines. A range of researchers have explored its conceptual and practical implications. For example, Williams, Turnbull, and Chait (1982) investigated it through the lens of social insurance frameworks and institutional arrangements. Luciani (1988) focused on the structural and economic dimensions of the concept, while Cable (1995) contributed to understanding its global dynamics by examining international economic interdependencies. Marsh (2012) highlighted how socio-economic security is challenged by rapid industrial transformations, particularly under the influence of technological revolutions.

In recent years, especially amid the socio-political instability caused by the Russian-Ukrainian war, Ukrainian academic discourse has shifted significantly toward enterprise-level resilience and protection mechanisms. This context has spurred a deeper investigation into the mechanisms for safeguarding socio-economic security at the organizational level. Noteworthy contributions include theoretical and empirical insights provided by Kurguzenkova (2015), Kolenda (2016), Sosnovska and Zhytar (2018), Romanovska (2019), Danylyshyn, Onyshchenko, and Maslii (2019), as well as more recent works by Samoilenko, Britchenko, Levchenko et al. (2022), Kalyniuk (2023), Kopytko and Malanchuk (2023), and Pakhucha, Sevidova, Romaniuk et al. These studies have collectively clarified the conceptual boundaries and practical drivers of enterprise-level socio-economic security in volatile conditions.

Ensuring the socio-economic security of an enterprise is one of the key strategic priorities in organizing its activities, which

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highlights the urgent necessity to examine the concept of "strategy" as a core theoretical category that defines the structure of the strategic model for maintaining socio-economic security. It is widely recognized in economic science that strategy represents a primary trajectory for guiding organizational development. A more detailed interpretation of enterprise development strategy was provided by Vasylyga (2020): strategy is "a comprehensive system of rules, tools, and mechanisms that support effective enterprise functioning amid resource constraints and dynamic internal and external changes" (Vasylyga, 2020). In essence, a strategy outlines a systematic course of action to fulfill defined objectives or address critical issues in environments characterized by volatility and competitive pressure. Within enterprise management, strategy outlines the overarching logic and methodology of action required to accomplish the organization's mission. Fundamental components of a strategy include setting objectives, environmental scanning, identifying strategic advantages, task implementation planning, and rational resource distribution. Ideally, a strategy should be resilient and adaptable, given the potential for rapid change in external conditions.

Based on the above understanding of strategy, we can formulate an applied definition of a strategic model. A strategic model refers to a conceptual framework that integrates the core components of an organization's strategy, often represented visually or schematically. Such a model encompasses essential elements of strategic planning and management, offering insight into how an organization sets priorities, allocates resources, and adapts to internal and external changes (Ansoff, 1987). Strategic models may serve different functions and appear in diverse formats. Some emphasize the mapping of core strategic pillars—mission, vision, objectives, and strategic actions—while others focus on environmental diagnostics, competitive analysis, and the simulation of security-related scenarios (Porter, 1985). A crucial feature of strategic models is their ability to demonstrate the interconnectedness between strategic components and to support decision-making under uncertainty (Mintzberg, Ahlstrand, & Lampel, 2005).

The concept of security itself is broadly understood in institutional literature. According to the International Atomic Energy Agency (IAEA), security refers to a state in which individuals, systems, and the environment are shielded from potentially harmful influences. In regulatory documents, it is defined as a property of systems and processes that, despite exposure to various threats, remain in a stable, dynamically controlled state with minimized risks of critical incidents (IAEA, 2023).

Schelever and Fizer (2019) emphasize that the notion of security can be interpreted in multiple conceptual dimensions. From one perspective, it represents an inherent characteristic of a system that enables it to maintain structural integrity and support long-term development. Alternatively, it may be viewed as a protective framework designed to shield entities from both internal and external risks. Despite these differing perspectives, scholars agree that security's core function lies in safeguarding system coherence, maintaining operational stability, and fostering resilience (Shelever & Fiser, 2019).

Kolenda (2016), through a comparative analysis of the categories of economic and social security in enterprise settings, provides a detailed understanding of their integration within the concept of socio-economic security. According to the author, economic security is defined as a condition of dependable protection of the enterprise's socio-economic structure from both current and emerging threats, ensuring adaptability, internal cohesion, and steady profitability. In contrast, social security refers to the assurance of the workforce's rights, professional identity, and access to adequate living standards, which in turn facilitates talent retention and performance growth.

Combining these dimensions, socio-economic security is characterized as a holistic state in which an enterprise is capable of withstanding environmental volatility, fostering internal development, and preserving both financial and human capital. It implies the synchronization of profitability, workforce well-being, and organizational continuity under dynamic economic conditions (Kolenda, 2016).

Based on the above definitions, the phenomenon of socio-economic security of an enterprise can be more precisely described as a state of protection against both internal and external hazards that ensures the sustainable growth of an enterprise, its financial resilience, safeguarding of employee rights and interests, and facilitates the conservation and rational use of available resources. Its implementation involves a comprehensive set of actions aimed at mitigating risks and threats that could negatively influence enterprise performance.

The key functional characteristics of an enterprise include its organizational setup, internal structure, systemic interrelations, and governance mechanisms (Beridze, Baranik, Dashko et al., 2023). Understanding the core nature of socio-economic security is closely connected with the recognition that any enterprise represents a complex control system structured around three fundamental elements of differing origins: material, energy, and informational resources (Beridze, Baranik, Dashko et al., 2023). Therefore, environmental safety should be understood as a framework of interventions targeting the protection of physical infrastructure, energy and transformation capacities, and information processes. These three areas predominantly relate to the economic dimension of security. Evidently, physical security of an enterprise involves creating conditions that ensure the integrity and operational readiness of its physical assets essential for production (from buildings

to equipment). Energy security involves maintaining access to essential resources, along with the capacity to convert raw materials into value-added products — the core of enterprise functionality.

In the context of the information society and innovative development, the efficient structuring of information flows becomes a critical determinant of socio-economic security in enterprises. Given the rising value of informational assets, it is essential to focus not only on processing data but also on the techniques and channels through which it is acquired. The volume of information—interpreted as an indicator of the systematic nature of enterprise operations—can serve as a natural metric for assessing managerial control quality. According to Beridze, Baranik, Dashko et al. (2023), once a company achieves the optimum degree of informational order, it begins to operate as a coherent and integrated system.

As the same authors argue, the enterprise's adaptive and structural flexibility is largely determined by its well-calibrated information architecture, which must correspond to the scale and nature of its production processes (Beridze, Baranik, Dashko et al., 2023). Applying this idea to the context of socio-economic security, one can assert that a major prerequisite for a secure operational environment in innovative settings is the design of a tailored information structure, one that reflects both production scale and content.

The social pillar of socio-economic security encompasses the conditions ensuring social and legal safeguards for employees. Indicators of this component include low employee turnover, safe working environments, robust systems of social benefits, and adherence to labor legislation, particularly in terms of additional payments and entitlements for protected categories. These factors exhibit a high degree of mutual influence and functional interdependence, forming the social stability foundation of the enterprise.

The specificity of our study lies in the fact that socio-economic security is examined in direct correlation with the innovative trajectory of the enterprise and that of its immediate operational ecosystem. Ambiguity and elevated risk levels are inherent attributes of enterprise innovation processes within the contemporary technological context. At every stage of innovation activity—from concept development to implementation and practical application—there exists a substantial likelihood of deviation from planned outcomes. This may result in unforeseen expenses and losses, particularly when enterprises invest in the launch of new products or services, the modernization of technologies, or managerial innovations that ultimately fail to deliver the anticipated results (Gonchar, Cherep, Cherep, 2019).

In current economic discourse, the concept of innovative potential of personnel is widely acknowledged. This refers to the aggregate of skills, tendencies, and motivational factors that define an employee's capacity to contribute to innovation. It is notable that this form of potential functions not only as a resource but also as an enabler of all other enterprise resources, amplifying their effectiveness in innovative activities (Cherep, Adamenko et al., 2023).

The effectiveness of innovation risk management—whether within individual innovation projects or across the enterprise as a whole—is determined by a set of interdependent factors. These include the structure and organization of risk control, the development level of methodologies and tools, access to financial instruments for mitigation, and the execution quality of risk strategies. The elevated risk profile of innovation stems from the fact that substantial financial investments are often required, while not every innovation leads to a positive economic outcome for the enterprise (Gonchar, Cherep, Cherep, 2019).

The natural consequence of developing a robust and comprehensive strategic model for ensuring an enterprise's socio-economic security is the formation of a corresponding methodological framework, which enables the creation of a resilient and adaptive socio-economic environment, aligned with the enterprise's stage of innovative development. It is important to emphasize that a methodological approach is essentially a model-driven system of quantifiable indicators and evaluation criteria, along with specific tools for their assessment.

A representative example of such a framework is the methodological approach introduced by Cherep, Brych et al. (2019), which focuses on evaluating innovation performance within machine-building enterprises. Their approach integrates several interconnected elements that reflect its analytical scope: assessment of innovation activity, innovation efficiency levels, the presence of innovative solutions, and the rate of their integration within the organization's operations (Cherep, Cherep, Brych et al., 2019).

AIMS AND OBJECTIVES

The purpose of the study is to design a strategic framework for ensuring the socio-economic security of enterprises and to formulate a methodological approach that facilitates the gradual enhancement of enterprise-level socio-economic security through the lens of innovative advancement.

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METHODS

To achieve this goal, the following research methods were applied:

1. A critical review of scholarly literature addressing the challenges of ensuring the socio-economic security of enterprises in the context of innovative development.
2. Comparative analysis of indicators and features of enterprise-level socio-economic security.
3. Integrated synthesis of indicators reflecting a high level of socio-economic security and methods for their evaluation.
4. Classification and structuring of levels of socio-economic security implementation across enterprises.
5. Generalization of existing knowledge from the literature on established models of enterprise security.

Thus, throughout the research process, a range of general scientific methods was employed, including analysis, synthesis, comparison, classification, and generalization.

The theoretical and methodological foundation of the research is grounded in the works of both domestic and international scholars concerning the nature and structure of socio-economic security in enterprises (Kolenda, 2016; Sosnovska & Zhytar, 2018; Romanovska, 2019; Danylyshyn, Onyshchenko & Maslii, 2019; Samoilenko, Britchenko, Levchenko et al., 2022; Kalyniuk, 2023; Kopytko & Malanchuk, 2023; Pakhucha, Sievidova, Romaniuk et al., 2023); the systems approach in economics (Bertalanffy, Wiener, Ashby, Beer, 1950); the concept of multi-level economic security (Yaroslavsky, 2020); frameworks related to the components and tiers of enterprise-level socio-economic security (Berlach, Hryshko, Sosnovska, Subota, Yaroslavsky et al., 2020, 2021); and theories concerning the innovation potential of human capital within enterprises (Cherep, Adamenko, Dashko et al., 2023).

RESULTS

The result of our theoretical exploration was the development of a unified strategic model aimed at ensuring the socio-economic security of enterprises within the framework of innovative development. The versatility of the proposed model is reflected in its ability to capture the essential dimensions of security provision across enterprises regardless of their industry or scale of operations.

The formulation of this strategic model involves the identification of core components—including structural elements, stakeholders, and hierarchical levels—whose protection must be guaranteed. These identified dimensions form the foundation for defining strategic objectives, which constitute the conceptual nucleus of the model. This foundation, in turn, provides the basis for selecting performance indicators that assess the effectiveness of the enterprise security organization, thereby enabling the construction of a tailored methodological approach for evaluation and monitoring.

The starting point of the strategic model was the idea of the two-component nature of socio-economic security, which includes economic and social components that are closely interconnected (Figure 1).

The subsequent process of building the model involved the step-by-step elaboration of its components. The model presents five levels of socio-economic security of an enterprise, which are differently related to its economic and social components. In particular, the physical, energy, and information levels are mainly related to the economic component of the enterprise's socio-economic security, while the legal and personnel levels are related to the social component.

The physical level of the company’s socio-economic security covers measures and mechanisms aimed at protecting its material assets. This includes not only preserving the integrity of the company’s material resources, but also active measures to protect against natural disasters and accidents, as well as against intentional damage to property. The effectiveness of this level of security depends on the correct assessment of potential risks, rational and economical management of material resources, ergonomic sales and supply chains, and the development of a comprehensive security plan that includes physical barriers, alarm systems, video surveillance, access control, etc.

The energy level of the company’s socio-economic security is focused on ensuring a stable and efficient supply of various types of energy (electricity, heat, fuel, natural gas, etc.) required for all its operational processes. Effective energy management requires a comprehensive approach that includes analyzing energy consumption, implementing energy-saving technologies, diversifying energy sources, and developing strategies to effectively respond to energy crises. The key lies in implementing robust monitoring mechanisms for energy consumption and promoting the integration of alternative and renewable energy sources, which not only minimizes reliance on conventional energy supplies but also mitigates the

ecological footprint of the company's operations. Ensuring the energy security level is a fundamental aspect of strategic planning and management of an enterprise, which affects its ability to adapt to changes in the global energy landscape and ensure sustainable economic growth.

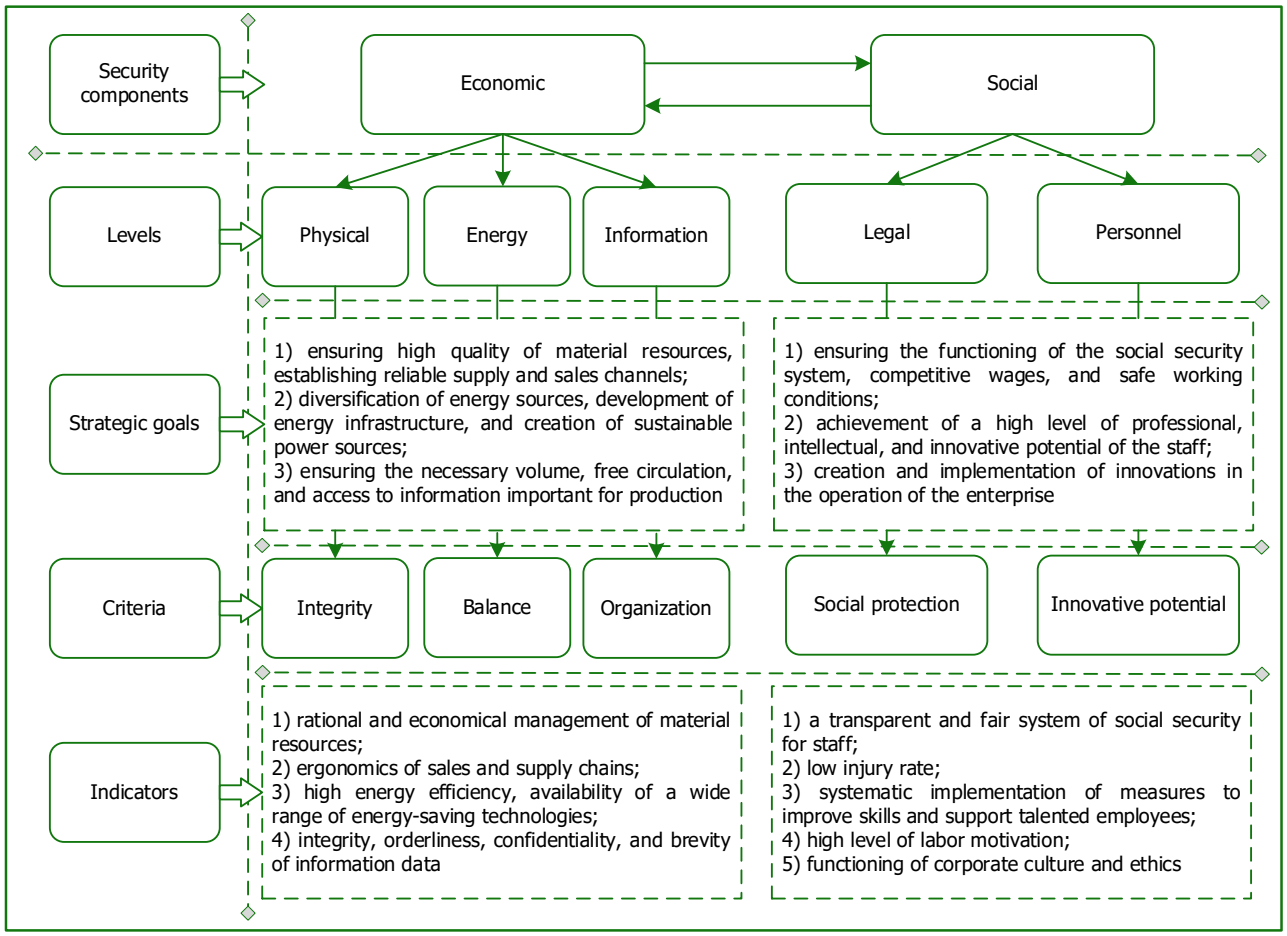

Figure 1. Strategic framework for maintaining the socio-economic security of enterprises amid innovative transformation.

The information security level determines the specifics of information resources administration, as well as the degree of their protection against unauthorized access, theft, cyberattacks, and other threats. Ensuring this level of security involves the development and implementation of technological means of information storage. An important component is also the ability of an enterprise to respond to security incidents and restore its information resources if necessary.

The legal level of the company's security focuses on ensuring compliance with all requirements of laws, regulations, and international standards governing its activities. This aspect includes the protection of intellectual property rights, compliance with corporate law, tax law, employment rules, environmental standards, and other regulatory requirements. An important aspect of the legal level of enterprise security is the organization of social protection of personnel, which is expressed in the effective functioning of the social security system, competitiveness of wages, and organization of safe working conditions. The result of effectively ensuring the legal level of enterprise security in the social context is the retention of highly qualified and highly motivated personnel.

The human resources level of the enterprise's socio-economic security focuses on ensuring employee competence, professional development, and the availability of qualified personnel capable of adapting to dynamic economic and technological conditions. This includes the processes of recruiting, developing, and retaining staff with high innovative potential, as well as creating a healthy and motivating work environment. On the one hand, ensuring the optimal staff composition capable of performing professional and production tasks of high quality contributes to the achievement of the company's strategic goals, and on the other hand, it is a strategic goal in itself. The result of effectively ensuring the legal level of enterprise security in the social context is the progressive development of the professional, intellectual, and innovative potential of the personnel.

It should be emphasized that the social component of security as an organic combination of legal and personnel policies

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of an enterprise makes the greatest contribution to the formation of innovative potential and, accordingly, ensures the innovative vector of enterprise development.

The levels of enterprise functioning, which in the context of socio-economic security are grouped into a triad of economic security components and a dyad of social security components, are extrapolated into criteria. According to the established levels, the model outlines five core criteria for ensuring the socio-economic security of an enterprise: 1) material integrity – reflects the preservation of the material base of the enterprise and its effective management; 2) energy balance – denotes the rational administration of the energy resources of the enterprise, their appropriate distribution to production processes; 3) information orderliness – systematization and organization of information in order to ensure its accessibility, ease of finding and comprehensibility, use only the necessary minimum of information; 4) social protection – implementation of social guarantees for employees of the enterprise; 5) innovation.

The defined strategic goals are closely aligned with the previously identified levels and criteria for ensuring the socio-economic security of the enterprise. As can be seen from Figure 1, they are in the framework of these components of the strategic model, aimed at their multidimensional optimization and naturally embodied in indicators. The criteria and indicators of socio-economic security are the theoretical basis of the methodological approach to creating a safe socio-economic environment within the framework of the enterprise. They are embodied in specific performance indicators of socio-economic security that can be measured in the monitoring process.

The methodological approach to ensuring socio-economic security on the basis of innovative development is embodied in the set of criteria and indicators presented in the model.

Let us assess the level of innovation development based on the data of The Global Innovation Index for 2014-2023 (Table 1) (Wipo, n.d.).

Table 1. Designation of indicators for assessing the level of innovation development.

Designation	Indicator
X1	Institutions
X12	Political environment
X13	Regulatory environment
X14	Business environment
X2	Human capital and research
X21	Education
X22	Tertiary education
X23	Research and development (R&D)
X3	Infrastructure
X31	Information and communication technologies
X32	General infrastructure
X33	Ecological sustainability
X4	Market sophistication
X41	Credit
X42	Investment
X43	Trade, diversification, and market scale
X5	Business sophistication
X51	Knowledge workers
X52	Innovation linkages
X53	Knowledge absorption
X6	Knowledge and technology outputs
X61	Knowledge creation
X62	Knowledge impact
X63	Knowledge diffusion
X7	Creative outputs
X71	Intangible assets
X72	Creative goods and services
X73	Online creativity

In order to assess the parameters of economic security, the main attention is paid to the consideration of its two components (according to the classification in the Order "On Approval of Methodological Recommendations for Calculating the Level of Economic Security of Ukraine" (Ministry of Economic Development and Trade of Ukraine, 2013): macroeconomic security and industrial security.

The proposed model comprehensively incorporates both macroeconomic and microeconomic indicators, ensuring a balanced assessment of the external economic environment and the enterprise's internal security parameters (Figure 2).

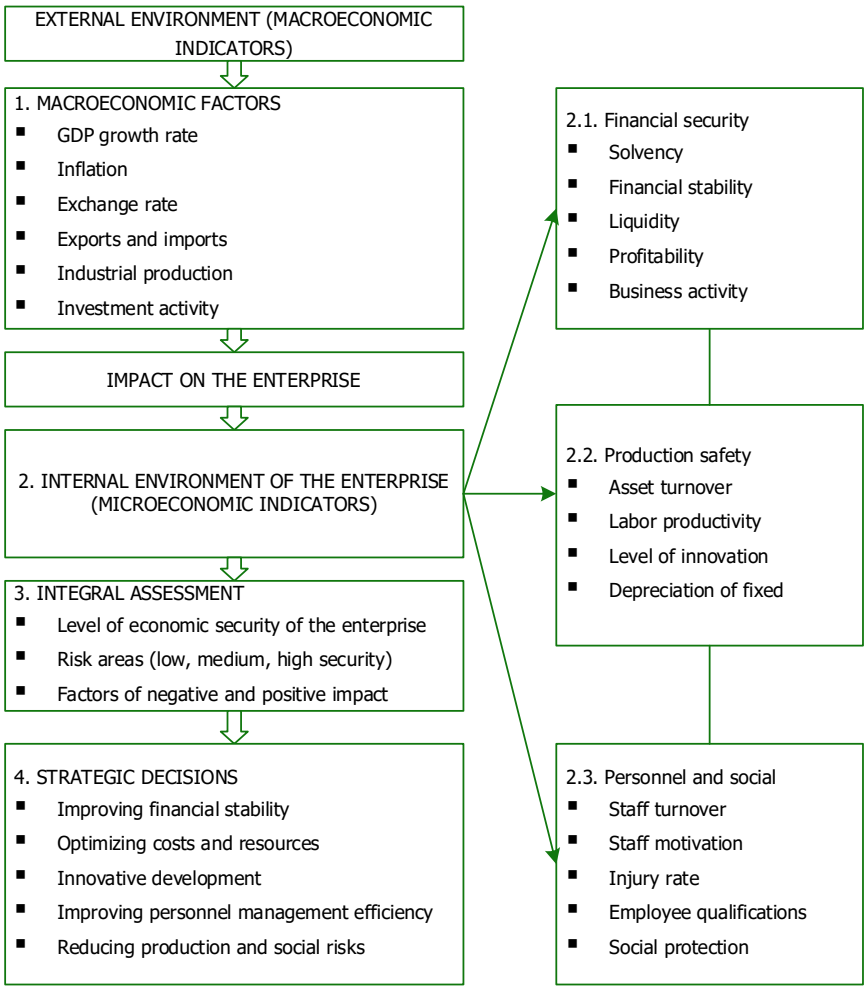

Figure 2. Comprehensive model for assessing the economic security of an enterprise.

Figure 2 presents a generalized model demonstrating the relationship between the external macroeconomic environment and the internal microeconomic indicators of an enterprise, which directly determine its financial, production, and personnel security. This structure corresponds to the systemic view of security described in the studies by Beridze et al. [Beridze et al., 2023], which emphasize the complexity and multi-structural nature of the internal environment of an enterprise.

In other words, Figure 2 clearly shows the methodological inconsistency between the use of exclusively macroeconomic indicators and the real needs of assessing enterprise security. The combination of macro- and micro-level indicators provides a more complete and more accurate picture of the state of economic security, which is consistent with modern scientific approaches. The inclusion of microeconomic indicators such as financial stability, solvency, profitability, and personnel characteristics increases the accuracy of the assessment and makes the model relevant for practical application at the enterprise level.

As demonstrated in recent research on socio-economic security under the conditions of European integration challenges (Cherep et al., 2024), the national economic environment forms a foundational external layer that directly influences the stability and resilience of enterprises. Even though enterprise-level security requires the inclusion of microeconomic indicators, the assessment of macroeconomic dynamics remains essential for understanding the broader systemic conditions

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in which enterprises operate. Therefore, to reflect the external environment's impact on enterprise security, the study further examines the key macroeconomic indicators considered fundamental for evaluating the national economic context.

To demonstrate how the proposed model can be operationalized in practice, Table 2 presents an illustrative authors-developed example of calculating normalized values for several key microeconomic indicators and deriving a corresponding sub-index of enterprise economic security. Normalization allows for the transformation of indicators with different units of measurement into a unified 0–1 scale, making them comparable and suitable for integration. This approach aligns with established methodological principles of multi-criteria evaluation (Kolenda, 2016; Sosnovska & Zhytar, 2018; Yaroslavskyi, 2020) and enables the formation of a composite assessment reflecting the internal financial stability of the enterprise.

Table 2. Example Table: Calculating Sub-Indices for the Economic Security Model.

Indicator	Value	Min	Max	Normalized Value (Ni)
Liquidity Ratio	1.8	1.0	2.5	0.53
Profitability (%)	12%	5%	20%	0.47
Asset Turnover	2.1	1.0	3.0	0.55

Sub-Index Calculation

Financial Sub-Index (Ifin) is calculated as the average of the normalized values:

Ifin = (0.53 + 0.47 + 0.55) / 3 = 0.52

The obtained value of the financial sub-index (Ifin = 0.52) indicates an average level of financial security, reflecting a balanced but not sufficiently strong position of the enterprise in terms of liquidity, profitability, and asset efficiency. This result demonstrates how individual normalized indicators can be aggregated into a meaningful quantitative assessment. The same procedure may be applied to other components of the model – material integrity, energy balance, information orderliness, social protection, and innovation potential – allowing for the calculation of a final integrated index of economic security. Such an index provides a holistic and quantifiable measure of the enterprise's resilience and supports strategic decision-making in the context of dynamic economic conditions.

Given that the external economic environment remains a crucial determinant of enterprise security, the next section examines the key macroeconomic indicators used in the study.

As components of macroeconomic security, the indicators (according to the Ministry of Finance for 2014-2023) are considered:

- У1 – Nominal GDP, UAH million.;
- У2 – Real GDP, UAH million;
- У3 – GDP per capita, UAH;
- У4 – GDP per capita, USD;
- У5 – Exports, UAH million;
- У6 – Imports, UAH million;
- У7 – Consumer spending, UAH million;
- У8 – Gross accumulation, UAH million;
- У9 – Volume of industrial products sold, UAH million;
- У10 – Capital investments, UAH million.

The following indicators (according to the State Statistics Committee (Мінфін, n.d.) for 2014-2023) are considered components of industrial safety:

- Z1 – Volume of products manufactured, UAH million;
- Z2 – Volume of products sold, UAH million;
- Z3 – Number of enterprises;
- Z4 – Number of employees, thousand people;
- Z5 – Value added, UAH million;

- Z6 – Salary expenses, UAH million;
- Z7 – Equity, UAH million;
- Z8 – Inventories of work in progress, UAH million;
- Z9 – Current assets, UAH million;
- Z10 – The volume of innovation expenditures, UAH million.

Based on the statistical data studied, we calculated economic security indices for macroeconomic and industrial security using the following formulas:

$$I = \sum_{i=1}^{10} w_i * k_{ij} \quad (1)$$

where w_i is the assessment of the significance of the i-th parameter obtained using the hierarchy analysis method; k_{ij} is the pre-normalized value of Ui and Zi (for macroeconomic and industrial security) for the respective year (Figure 3).

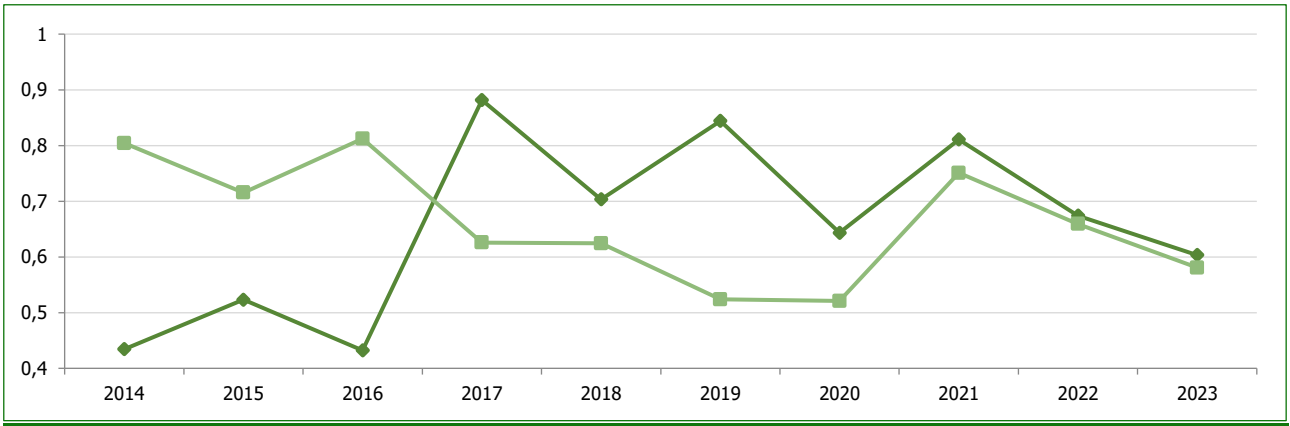

Figure 3. Calculated levels of macroeconomic and industrial security of Ukraine.

As can be seen from Figure 3, until 2016, according to the indicators chosen for the calculation, the level of macroeconomic security exceeded the level of economic security, and since 2017, the situation in the field of industrial security has improved. With the beginning of a full-scale invasion in 2022, both indicators are expected to decline.

To determine the indicators of innovation development that have the greatest impact on security indicators, correlation coefficients between them were calculated and presented in Figure 4.

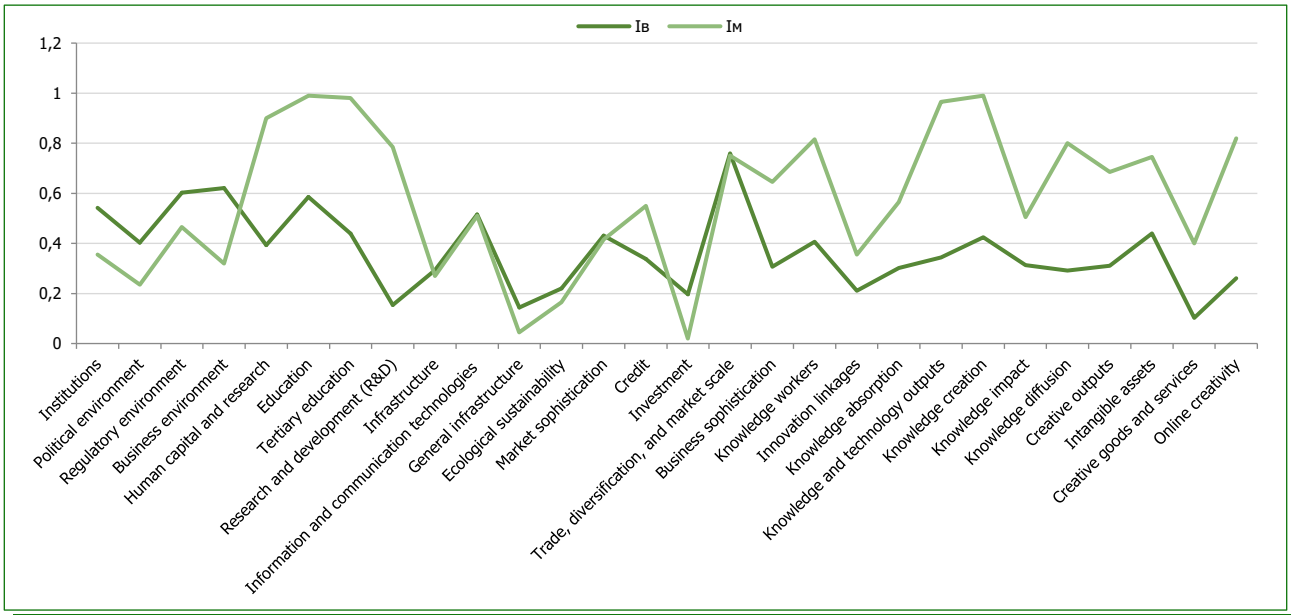

Figure 4. The surface of correlations between the indicators of innovation development that have the greatest impact on security indicators.

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Analyzing Figure 3 shows that the greatest impact on economic security indicators is caused by indicators of infrastructure development and human capital development, with the following components among the most influential in other groups: education development, regulatory environment, business environment, and information and communication technologies.

Thus, focusing efforts in this area of innovation development will have the greatest positive impact on the level of economic security.

Thus, the methodological approach proposed on the basis of the strategic model is based on the primary quantitative assessment of nine indicators that meet the defined criteria, which, in turn, embody the most important aspects of the enterprise's functioning. The indicators signal the degree of achievement of strategic goals in ensuring the economic and social security of the enterprise, namely: 1) rational and economical management of material resources (meets the criterion of material integrity); 2) ergonomics of sales and supply chains (criterion of material integrity); 3) high energy efficiency, availability of a wide range of energy-saving technologies (criterion of energy balance); 4) integrity, orderliness, confidentiality, conciseness of information data (criterion of information orderliness) 5) existence of a transparent and fair system of social security for personnel (social protection); 6) low level of injuries (combination of criteria of material integrity and social protection); 7) systematic implementation of measures to improve skills and support talented employees (innovation potential); 8) high level of labor motivation (innovation potential); 9) functioning of corporate culture and ethics (social protection). The mathematical tools and methods of their quantitative assessment are a prospect for further research.

DISCUSSION

The components of the enterprise's socio-economic security highlighted in the strategic model appear in the works of many scholars who considered them as a separate subject outside the general context of ensuring a secure socio-economic environment of the enterprise. For example, the model of physical and information security of organizations is considered by Bernanda, Wang, Kaburuan & Jayadi (2019). The information security of enterprises is the subject of Pudycheva (2016), Mykoliuk, Bobrovnyk & Svistunov (2019), and others. The legal security of organizations in the context of doing business was studied by Donham and Isaacs (1923), Matukova, Mokriak, and Matukova-Yaryha (2019), and others. The issues of personnel security of enterprises are covered in the works of Bashynska & Biziukova (2016), Smokvina G. A. & Yankovska O. A. (2019), and others.

It is worthwhile to examine the individual components of the strategic model through the lens of how they are interpreted by other researchers, as this highlights their function as critical nodes in securing the socio-economic stability of modern enterprises amid innovative transformation. Their leading role in the sustainable and relatively safe functioning of modern enterprises is indirectly confirmed by the fact that they have appeared relatively recently in the plane of enterprise functioning and are due to the rapid technological progress of recent decades. In particular, we are talking about information security and energy independence of the enterprise, as well as the innovative potential of its personnel.

Voynarenko, Cherep, Gonchar et al. (2019) draw attention to the close connection between the information level of security of modern enterprises and their innovative development. These researchers are convinced that at the present stage, the implementation of innovative projects is not possible without a well-organized information support system. According to other scholars, the role of the information and digital environment for the development of companies, organizations, and enterprises is growing, and the requirements for their competitiveness are transforming under the influence of digital advances (Kniazieva, Podolskyi, Arakelova, Dashko, & Mohylova, 2023).

The importance of strengthening energy security is emphasized by Cherep, Adamenko, Dashko, Korolenko & Kornukh (2023). They note that from the perspective of creating economic security for Ukrainian enterprises, there are two ways to strengthen energy security that are closely related to the realization of the capabilities of modern technologies. The first is the use of batteries or biomass for short-term energy storage. The second involves the use of hydrogen biotechnology for long-term storage. Such security measures can be implemented through appropriate public-private cooperation projects. This aspect fits well with the strategic goals of enterprises presented in our strategic model of socio-economic security.

Voynarenko, Cherep, Honchar et al. (2019), Adamenko, Dashko, Korolenko, and Kornukh (2023) draw attention to the innovative potential of modern enterprises in the context of ensuring socio-economic security. These scholars have differentiated several obstacles to enhancing the positive impact of the innovative potential of staff on strengthening the economic security of enterprises. These difficulties are manifested in the absence of an innovative component in the professional development program for employees of most Ukrainian companies and government agencies. Another problematic issue is the indicator related to the innovative potential of the staff, which is enshrined in the legal acts of Ukraine regulating

innovative development. An additional obstacle is the lack of joint projects between the state and private enterprises to improve the innovative potential of the staff. Another significant problem is the lack of a specialized government agency that would deal with strategic aspects of cooperation with business structures and other private enterprises (Cherep, Adamenko, Cherep, Dashko, Korolenko, & Kornukh, 2023). The identified obstacles should be carefully considered and addressed during the implementation of measures aimed at enhancing the socio-economic security of enterprises, as envisioned within the strategic model developed in this study.

Voynarenko, Cherep, Gonchar et al. (2019) analyzed in detail the consequences of their insufficient innovative development and ineffective innovation activities on the example of the specifics of machine-building enterprises in Ukraine. In particular, this leads to a significant predominance of the same type of production, making it difficult to improve the quality of products, which over time is less and less relevant to the actual needs of consumers. According to these scientists, the intensification of innovation activity will ensure the growth of machine-building enterprises, their competitiveness by improving the production process, increasing the output of new products, labor productivity, increasing sales volumes, and implementing innovative projects (Voynarenko, Cherep et al., 2019).

Also, in the context of understanding the strategic model of socio-economic security within the framework of innovative development of an enterprise, the key competencies of personnel that determine the level of their innovative potential, which can be used to strengthen a secure socio-economic space, are important. These specific competencies include: 1) strategic thinking; 2) introduction of new approaches and methods to solving current and strategic tasks; 3) ability to generate original, non-standard ideas, as well as effective non-standard solutions to problematic aspects of the enterprise's functioning; 4) ability to extrapolate successful innovative experience of other organizations and institutions to their own enterprise; 5) ability to increase the adaptive capabilities of the enterprise in accordance with a given level of socio-economic security through personal flexibility and adaptability; 6) ability to support.

Therefore, based on the comparison between the content elements of the proposed strategic model for ensuring enterprise socio-economic security in the context of innovation and the components found in the existing literature, it can be concluded that our model effectively encompasses the most critical dimensions of secure enterprise functioning and can be successfully integrated into their ongoing innovative development processes.

CONCLUSIONS

In conclusion, it is necessary to outline the main ideas presented in the article. Firstly, when building a strategic model for ensuring socio-economic security of modern enterprises, we proceeded from the fact that the structure and nature of enterprise functioning, as well as the phenomenon of its socio-economic security, are multidimensional, hierarchical, and polydeterministic entities, which necessitate the use of a systematic approach for their scientific research. Secondly, any strategic model is a system of conceptual representations of the main elements of an enterprise's strategy and their logical interconnection, describing a certain area of its functioning (for example, the area of socio-economic security of an enterprise). This type of model includes key aspects of strategic planning and management that help to understand how the organization tries to achieve its goals and adapt to the environment. Thirdly, the state of socio-economic security of enterprises is determined by the peculiarities of managing its fundamental components such as material, energy, information, and human resources.

The result of our scientific investigation is the development of a comprehensive strategic model for ensuring the socio-economic security of enterprises under conditions of innovative development, alongside the establishment of a conceptual foundation for a methodological framework focused on the qualitative assessment and structured organization of this type of security. The strategic model introduced in this study serves as an illustration of the systemic approach to building a secure socio-economic environment within enterprises, tailored to the current realities of technological advancement and digitalization of production systems.

The model distinguishes five hierarchical levels of socio-economic security, each correlating differently with the enterprise's economic and social domains. Specifically, the physical, energy, and information tiers primarily align with the economic component, while the legal and human resources levels pertain to the social dimension of enterprise security. In accordance with these levels, the model defines five core criteria and outlines a set of strategic objectives for ensuring socio-economic security. These are further operationalized through a system of indicators, forming the theoretical underpinning of a methodological approach to building a secure socio-economic environment aligned with the enterprise's innovative trajectory.

An important contribution of the study is the demonstration of how this model can be applied at the microeconomic level

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through the calculation of normalized indicators and sub-indices. The illustrative table included in the paper shows a practical example of quantifying financial indicators, confirming the applicability of the model for enterprise-level analysis and decision-making.

The scientific novelty of the proposed model lies in the creation of a conceptual framework that integrates key dimensions of enterprise functioning with the aim of achieving an adequate level of socio-economic security in the context of innovative advancement. The practical relevance of the findings is reflected in the potential application of the model's indicators for systematic monitoring and evaluation of socio-economic security within contemporary enterprises.

Future research directions involve a more detailed elaboration of the proposed methodological approach, particularly the development of analytical tools and mathematical models to quantitatively assess each of the designated indicators, thereby providing a measurable representation of security realization at every structural level of enterprise activity.

ADDITIONAL INFORMATION

AUTHOR CONTRIBUTIONS

All authors have contributed equally.

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CONFLICT OF INTEREST

The Authors declare that there is no conflict of interest.

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СТРАТЕГІЧНА МОДЕЛЬ ЗАБЕЗПЕЧЕННЯ СОЦІАЛЬНО-ЕКОНОМІЧНОЇ БЕЗПЕКИ ПІДПРИЄМСТВ В УМОВАХ ІННОВАЦІЙНОГО РОЗВИТКУ

Проблема забезпечення соціально-економічної безпеки підприємств набуває особливого значення в умовах інноваційного розвитку, що зумовлений високим темпом і динамікою технологічних, ринкових і соціальних трансформацій. Це період підвищеної вразливості та нестабільності функціонування підприємств, оскільки інноваційний розвиток може супроводжуватися непередбачуваними організаційними й соціальними наслідками. У цьому контексті було доведено, що соціально-економічна безпека підприємства є ототожненням його стабільного та продуктивного функціонування, збереження його суб'єктності, а також лежить в основі повної реалізації своєї місії.

Метою дослідження є створення стратегічної моделі забезпечення соціально-економічної безпеки підприємств і розробка на цій основі методологічного підходу, спрямованого на прогресивне підвищення рівня соціально-економічної безпеки підприємства на засадах інноваційного розвитку.

Теоретико-методологічною базою дослідження є низка наукових уявлень і концепцій: погляди науковців на сутність і зміст соціально-економічної безпеки підприємства, системний підхід в економіці, концепція ієрархічних рівнів економічної безпеки, уявлення про складові та рівні соціально-економічної безпеки підприємств, уявлення про інноваційний потенціал персоналу підприємства.

Створено універсальну модель забезпечення соціально-економічної безпеки підприємств в умовах інноваційного розвитку, яку можна використовувати для створення безпечного соціально-економічного простору на підприємствах різних типів і змісту діяльності. У рамках моделі визначено стратегічні цілі забезпечення соціально-економічної безпеки, що складають її змістове ядро, а також виокремлено критерії та індикатори ефективності організації безпечного середовища підприємства, що складають основу методологічного підходу до оцінки стану його забезпечення. Доведено, що соціально-економічну безпеку підприємства слід розглядати й забезпечувати в нерозривному зв'язку з його інноваційним розвитком.

Ключові слова: соціальна безпека, економічна безпека, матеріальна цілісність, енергетичний баланс, інформаційна впорядкованість, соціальний захист, інноваційний потенціал, корпоративна культура, трудова мотивація

JEL Класифікація: C50, C51, D20, E23