

STRATEGIC PLANNING SYSTEM AS A SOURCE OF COMPETITIVE ADVANTAGES FOR ECONOMIC ENTITIES

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Podolska O. V., Kralia V. H., Kozlova I. M. Strategic Planning System as a Source of Competitive Advantages for Economic Entities

The aim of this article is to explore the theoretical aspects of strategic enterprise planning and to define its key role in ensuring the stability and competitiveness of economic entities. In the context of the modern economy, characterized by external environmental instability, market globalization, and a constantly increasing level of competition, strategic planning is not only a management tool but also a foundation for ensuring the long-term success of enterprises. The article examines key problems in enterprise strategic planning, highlighting insufficient adaptation to rapid changes in market conditions, shortcomings in external and internal environmental analysis, a lack of clear goal-setting, and inadequate integration of strategy into the enterprise management system. Particular attention is given to the analysis of competitive strategies such as cost leadership, differentiation, and focus strategies. It is noted that effective selection and implementation of these strategies enable enterprises to establish sustainable competitive advantages, reduce risks, and enhance adaptability to market challenges. The study reveals that effective strategic planning allows enterprises to swiftly adapt to changes in the market environment, optimize costs, and improve the quality of products or services. This, in turn, contributes to achieving important goals such as increasing profitability, forming sustainable competitive advantages, and ensuring innovative development. The process of strategic planning presented in the article outlines its main stages: analysis of the external and internal environment, determination of mission and goals, strategy development, implementation, and result control. The article also analyzes the influence of external environmental factors, such as market trends, competition, and changes in consumer demand, on the selection and implementation of competitive strategies. Additionally, it considers the advantages of applying a strategic approach for enterprises across various industries. The conclusion is made that strategic planning is an integral component of modern management, which not only facilitates adaptation to contemporary market challenges but also lays the groundwork for the long-term development of enterprises.

Keywords: planning, strategy, competitiveness, management, competitive strategies, adaptation, development, business environment.

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Подольська О. В., Краля В. Г., Козлова І. М. Система стратегічного планування як джерело конкурентних переваг для суб'єктів господарювання

Метою даної статті є дослідження теоретичних аспектів стратегічного планування підприємства та визначення його ключової ролі у забезпеченні стабільності й конкурентоспроможності суб'єктів господарювання. В умовах сучасної економіки, що характеризується нестабільністю зовнішнього середовища, глобалізацією ринків та постійним зростанням рівня конкуренції, стратегічне планування є не лише інструментом управління, але й фундаментом для забезпечення довгострокового успіху компанії. У статті досліджено ключові проблеми стратегічного планування підприємства, серед яких виокремлено недостатню адаптацію до швидких змін ринкових умов, недоліки в аналізі зовнішнього і внутрішнього середовища, відсутність чіткої постановки цілей та недостатню інтеграцію стратегії у систему управління підприємством. Особливу увагу приділено аналізу конкурентних стратегій підприємств, таких як стратегія лідерства за витратами, стратегія диференціації та стратегія фокусування. Зазначено, що ефективний вибір та реалізація цих стратегій дозволяють компаніям формувати стійкі конкурентні переваги, знижувати ризики та підвищувати рівень адаптивності до викликів ринку. У ході дослідження встановлено, що ефективне стратегічне планування дозволяє підприємствам оперативно адаптуватися до змін ринкового середовища, оптимізувати витрати та підвищувати якість продукції чи послуг. Це, своєю чергою, сприяє досягненню таких важливих цілей, як підвищення рентабельності, формування стійких конкурентних переваг та забезпечення інноваційного розвитку. Побудована у статті схема процесу стратегічного планування демонструє його основні етапи: аналіз зовнішнього і внутрішнього середовища, визначення місії та цілей, формування стратегії, її реалізація та контроль

результатів. Особливо проаналізовано вплив факторів зовнішнього середовища, таких як ринкові тенденції, конкуренція та зміни споживчого попиту, на вибір та реалізацію конкурентних стратегій. Крім того, розглянуто переваги застосування стратегічного підходу для підприємств різних галузей. Зроблено висновок, що стратегічне планування є невід'ємною складовою сучасного менеджменту, яка забезпечує не лише адаптацію до викликів сучасного ринку, але й створює основу для довготривалого розвитку підприємства.

Ключові слова: планування, стратегія, конкурентоспроможність, управління, конкурентні стратегії, адаптація, розвиток, бізнес-середовище.

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Today's business environment is characterized by high dynamics of change, globalization and increased competition. In such conditions, strategic planning is of particular importance for ensuring the stability and competitiveness of enterprises. Strategic planning can be defined as the process of formulating long-term goals of an enterprise, determining ways to achieve them, optimizing resources and developing measures to adapt to changes in the external environment. The effectiveness of strategic planning directly affects the enterprise's market position, its ability to adapt to challenges, and the overall level of competitiveness. Strategic planning plays a key role in determining the areas of development that provide the enterprise with an advantage over its competitors.

The study of the impact of strategic planning on the competitiveness of enterprises is a relevant area in the field of management, and many researchers have made significant contributions in this area. Scientists have significantly expanded the understanding of the role of strategic planning in shaping the competitive advantages of enterprises. Key researchers are: Michael Porter (his research provides a systematic understanding of the impact of strategic planning on the market positioning of enterprises and the formation of their competitiveness), Igor Ansoff (his works help enterprises identify the most effective areas of development that increase their competitiveness), Henry Mintzberg (emphasized the role of flexibility in strategic planning, which ensures the ability of enterprises to respond quickly to competitive challenges) [6], Richard Rumelt (emphasizes the importance of a unique strategy for achieving competitive advantage, believing that strategic actions should be maximally adapted to the specif-

ics of the enterprise), Kathleen Eiserhardt (her works help to identify strategies that increase flexibility and speed of response to market changes).

D. Schendel and K. Harten explain strategic planning as "the process of identifying (and creating) a link between an organization and its environment, which includes achieving selected goals and attempting to achieve a desired state with the environment by allocating resources that enables the organization and its environment to operate effectively and efficiently" [5].

J. Bryson characterizes strategic planning as the inclusion of different types of planning activities in a company: strategic planning refers to plans of different frequency - long-term, medium-term, short-term, current and different functions - marketing, production, personnel, etc. [7].

At the moment, the process of strategic planning at enterprises remains insufficiently researched, which sometimes goes unnoticed by management, and which, combined with the realities of modern economic development and the crisis in the country, can lead enterprises to bankruptcy.

The aim of this article is to study the theoretical aspects of the enterprise strategic planning process and its importance for ensuring stability and competitiveness of economic entities.

Strategic planning is a system of methods and various tools that help identify key areas of improvement, growth, and operation of a company. This process is necessary to assess prospects, set growth parameters, and identify the organization's place in the entrepreneurial environment and its future business prospects.

Effective strategic planning in management makes it possible to properly analyze external threats to the organization and identify the most likely opportunities for growth based on the analysis. The result of such activities is a plan - a document that describes strategic and tactical goals supported by calculations and analyses. Effective strategic planning is a key tool for increasing competitiveness in the face of dynamic market changes. Strategic planning is a central element that leads to competitive advantage through innovation and process optimization.

Competitiveness at various levels is determined by how effectively the strategic planning system operates. For example, the better organizations or other economic entities plan their long-term goals and allocate resources, the higher the likelihood of achieving a competitive advantage.

Strategic planning of an enterprise's activities determines the workflow of modeling the vectors of the enterprise's development and formulating implementation methods, taking into account the real position of the enterprise in the industry, which ensures the consistent use and formation of the enterprise's capabilities to increase the enterprise's competitiveness. In addition, it should be noted that strategic planning has undeniable advantages [7].

Here are some different definitions of strategic planning:

Igor Ansoff: "Strategic planning is a set of methods and processes by which an organization defines its long-term goals, adapting its resources and identifying possible threats to achieve competitive advantage" [1].

Michael Porter: "Strategic planning is a process that allows an organization to analyze its strengths, weaknesses, and external threats and opportunities in order to create a unique market position and gain competitive advantage" [4].

Philip Kotler: "Strategic planning is a management process that focuses on creating and maintaining an organization's competitive advantage through market analysis, goal setting, and the development of action programs to achieve them" [2].

Henry Mintzberg: "Strategic planning is not just a set of decisions, but rather a creative process that combines analysis, intuition, and opportunity to adapt an organization to its environment and set its direction" [3].

Brian Quinn: "Strategic planning is the process of identifying the major long-term goals of an organization, making decisions about how to achieve those goals, and allocating the resources needed to achieve them" [5].

Each of these definitions emphasizes different aspects of strategic planning, such as adapting to the

environment, creating competitive advantages, allocating resources, and the need to integrate analytics with intuitive thinking.

The process of strategic planning and forecasting is quite complex and begins with the definition of the organization's objectives and goals that are consistent with its capabilities. A similar process takes place in the structural units, where tasks and goals are set based on current market priorities and available resources.

Then, based on the comparison of tasks and goals developed at different levels, an integrated strategy is applied. The general strategy, which already takes into account all the specifics and requests of the units, should provide for appropriate adjustments to the strategic plan. Such adjustments may be significant and may involve various changes.

Strategic plans can be long-term (three to five years), medium-term (annual), and short-term (less than a year). All of them are united by a single business idea and the management of the company's owners. The benefits of using a strategic planning system according to the authors [8-10], include:

- ✦ conducting a global study of possible business risks;
- ✦ optimizing the work of employees;
- ✦ achieving favorable situations for successful and profitable strategy implementation;
- ✦ development of strategic thinking among top managers;
- ✦ rational allocation of resources;
- ✦ effective management of internal processes;
- ✦ focusing on the main ways of improvement.

Strategic planning is conducted systematically and recorded in writing. This is very important for a clear and correct understanding of the plans by all employees involved in the work process.

To study the peculiarities of strategic planning of economic entities, it is advisable to apply the following methodological approaches:

The systems approach views the enterprise as a complex system where all elements are interconnected. This allows to take into account the internal and external factors that influence strategic planning and optimize the interaction between different divisions.

The process approach is aimed at analyzing the sequential stages of strategic planning: from analyzing the environment and formulating a strategy to its implementation and control. This ensures clarity and consistency of strategic steps.

The comprehensive approach allows for simultaneous studying of various aspects of strategic plan-

ning: economic, organizational, technical, and social. This approach ensures full coverage of all factors that may affect the competitiveness and sustainability of the business.

The innovative approach involves the integration of new technologies and methods into the strategic planning process, taking into account current trends and technological changes that may affect the development of the enterprise and its competitiveness.

The situational approach allows to adapt the strategy in accordance with the specific conditions of the enterprise's activities. This is especially important in the face of market volatility and frequent changes in external conditions.

The marketing approach focuses on the analysis of market conditions and consumer needs, which helps the enterprise to adapt strategic planning to market trends and customer needs.

The institutional approach takes into account the legal, cultural, and social aspects of economic entities, especially when entering new markets or operating in an international environment.

The use of these approaches in combination allows to build a flexible and adaptive strategy, take into account the specifics of the industry and improve the management of the enterprise in today's competitive environment. The choice of a specific methodological approach depends on the goals and objectives of the study, as well as the available resources.

The scheme of the strategic planning process at an enterprise includes several key stages that form a logical order for developing an effective strategy. This scheme can be presented in the form of consecutive blocks or in the form of a cycle, which symbolizes a continuous process of strategic planning, with the possibility of returning to the initial stages to adapt to changes (*Fig. 1*).

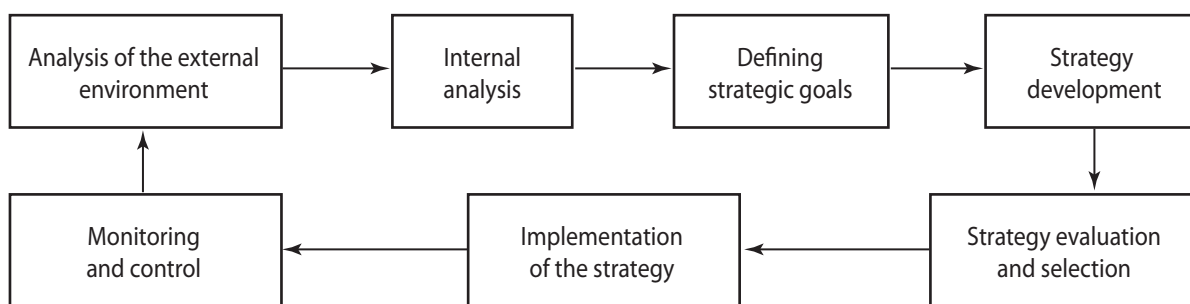


Fig. 1. Scheme of the strategic planning process at the enterprise

Source: authors' own development-

Analysis of the external environment:

- ✦ assessment of economic, political, social, and technological factors (PEST analysis);
- ✦ identification of industry trends and competitive environment.

✦ Internal analysis:

- ✦ assessment of the enterprise's strengths and weaknesses;
- ✦ identification of key resources, opportunities and constraints (SWOT analysis).

Defining strategic goals:

- ✦ formulating the enterprise's mission and vision;
- ✦ setting long-term goals aligned with the overall strategy.

Strategy development:

- ✦ choosing a strategic direction: diversification, innovation, market expansion, etc;
- ✦ identifying ways to achieve the set goals.

✦ Strategy evaluation and selection:

- ✦ modeling and analysis of risks and costs;
- ✦ selection of the most appropriate strategy from a range of alternatives.

Implementation of the strategy:

- ✦ allocation of resources and identification of responsible individuals;
- ✦ implementation of actions to achieve the goals within the defined time-frame.

Monitoring and control:

- ✦ evaluation of results and comparison with the set goals;
- ✦ adjusting the strategy when necessary.

In the context of an unstable environment, fierce competition and globalization of markets, strategic planning is becoming a crucial factor in improving business performance indicators, such as product quality and cost efficiency, which helps ensure that an enterprise remains competitive in the face of dynamic market changes. However, in practice, the key problems of strategic planning are related to insufficient coordination, incomplete environmental analysis, project overload, and lack of specific action plans at the unit level (*Table 1*).

The limitations associated with the lack of comprehensive analysis of the external and internal envi-

Table 1

Key problems of enterprise strategic planning

| Key issues | Characterization | Consequences |
|---|--|--|
| Unpredictability of the environment | Macroeconomic changes, technological breakthroughs, changes in legislation or market trends are difficult to predict | Wrong choice of strategy, loss of competitiveness |
| Lack of quality data and analytics | Insufficient data to evaluate the market, competitors, customers, which leads to false analysis | Wrong forecasts, loss of resources and mistakes in choosing strategic goals |
| Risks of insufficient management support | Lack of coherence between strategic goals and values of top management | Reduced efficiency in the implementation of strategic plans, delays in decision-making |
| Limited resources | Lack of financial, human or material resources to implement strategic plans | Inability to implement the chosen strategies, reduced productivity and quality |
| Weak organizational culture | Lack of staff support, insufficient adaptability to changes | Resistance to change, low motivation, slow implementation of strategic changes |
| Incorrect assessment of the competitive environment | Insufficient analysis of competitors' strengths and weaknesses | Underestimation of threats, loss of market share, low competitiveness |
| Lack of strategy flexibility | Excessive planning without taking into account the possibility of adaptation | Loss of opportunities in case of market changes, low efficiency in responding to new threats |
| Inconsistency of short-term and long-term goals | Focusing on current benefits to the detriment of long-term ones | Risk of failing to achieve strategic goals due to excessive focus on short-term objectives |
| Insufficient monitoring and adjustment | Lack of regular assessment of strategic goals achievement | Ineffective strategy implementation, accumulation of problems without timely intervention |

Source: authors' own development-

ronment can be overcome by strengthening the role of analytical departments and the use of external consulting services for in-depth analysis. Problems such as the substitution of strategy for goals and the lack of specificity in strategic plans should be addressed by developing a road-map with specific steps and those responsible for their implementation, as well as by the implementation of a monitoring and reporting system that ensures transparency in the execution of each stage of the plan.

Strategic planning is critical to the growth and prosperity of an enterprise, as it offers a systematic method for achieving long-term goals. With the help of strategic planning, it is possible to:

Improve decision-making. Creating a strategic plan requires in-depth analysis and understanding of the business, which leads to more informed decision-making at all levels of management. Executives and managers get a clear picture of the enterprise's goals and the criteria for achieving them, which makes decision-making more focused and deliberate.

Adapt to changes in the business environment. For example, to new technologies, changes in legislation, economic fluctuations, and changes in customer needs. This allows the enterprise to seize emerging opportunities and minimize potential threats.

Determine your place in the market and direction of development. By defining its own mission, vision, and values, an enterprise creates a foundation for all its future actions and decisions. This allows the entire team to move in a single direction and focus on achieving their common goals.

Allocate resources efficiently. Strategic planning allows an enterprise to optimize the allocation of its resources, both financial and human. It helps to determine which projects and areas are prioritized and deserve large investments of time and money.

Increase competitiveness. Enterprises that are actively engaged in strategic planning are often ahead of their competitors due to a better understanding

of the market and the ability to quickly adapt to its changes.

Determining an adequate strategic course is one of the most important tasks for an enterprise, as it sets the priorities of its activities for the long term. Therefore, it is extremely important for the enterprise's management to carefully approach the process of developing and implementing a strategic plan, taking into account numerous internal and external factors and focusing on key aspects. A deep understanding of the importance of this stage will allow you to respond promptly to changes in the business environment, ensure the formation and maintenance of competitive advantages in the marketplace, and maximize the strategic potential of the enterprise. Thus, optimizing the process of developing and implementing a competitive strategy is an urgent task. The theoretical analysis and systematization

of the criteria of enterprise competitiveness made it possible to define the types of competitive strategies in general.

Competitive strategies are different approaches and methods that enterprises use to gain an advantage over competitors and ensure long-term sustainability in the market. These competitive strategies can often be combined and adapted to specific market conditions and the needs of the enterprise, which ensures their high efficiency in achieving the enterprise's goals and improving its competitive position. They help to distinguish the enterprise from others, create a unique offer for consumers and achieve the desired financial performance. The key competitive strategies are as follows (Table 2).

Innovation is one of the key areas for improving competitiveness. Strategic planning allows enterprises to identify areas where the implementation of innovative solutions will be most effective. Based on

Table 2

Competitive strategies of the enterprise

| Name | Functions | Main features |
|--------------------------------------|--|---|
| Cost leadership strategy | The enterprise focuses on cost reduction, which allows it to offer goods or services at lower prices than its competitors. The main goal is to maximize efficiency and minimize production costs | <ul style="list-style-type: none"> – focus on mass production; – standardization of products; – economy of scale |
| Differentiation strategy | The company focuses on creating unique products that compare favorably with competitors' products, which can attract loyal consumers willing to pay more | <ul style="list-style-type: none"> – high quality of products; – unique properties and design; – focus on innovation |
| Focusing strategy (niche strategy) | The company chooses a narrow market segment and focuses on its needs, which allows it to become a leader in the relevant segment. This strategy is particularly effective for small and medium-sized enterprises | <ul style="list-style-type: none"> – focus on a specific market segment; – specialization in a particular industry; – close relationships with consumers |
| Strategy of innovative leadership | Focused on the continuous introduction of new technologies, products and processes. It allows the enterprise to stand out through innovation and attract customers who value progressiveness and novelty | <ul style="list-style-type: none"> – high speed of introduction of new technologies; – investment in scientific research; – risky investment policy |
| Adaptation strategy | It involves a flexible response to changes in the market and consumer needs, which allows to quickly adapt to changes in the external environment and remain competitive | <ul style="list-style-type: none"> – rapid response to market changes; – active use of information technology; – constant monitoring of competitors |
| Cooperation and partnership strategy | It is based on joining forces with other enterprises to strengthen competitive positions in the market. This may include alliances, joint ventures, or partnership agreements | <ul style="list-style-type: none"> – distribution of risks and costs; – access to new markets and technologies; – pooling resources to increase efficiency |

Source: authors' own development-

the analysis of the external environment and internal capabilities, enterprises can develop strategies that involve the introduction of new products, processes or technologies that will meet current and future market needs. Innovative activities, in particular, include:

- ✦ improving production processes to increase efficiency and reduce production costs;
- ✦ creation and promotion of new products that meet the needs of modern consumers;
- ✦ development and maintenance of technological infrastructure that allows to respond quickly to changes in the industry.

Despite the obvious importance of strategic planning, enterprises may face a number of barriers to its implementation, including: lack of necessary data for market analysis and forecasting; lack of support from management, which may result in insufficient funding or ignoring of strategic plans; weak organizational culture that prevents support for long-term changes; lack of qualified personnel capable of ensuring effective strategic planning.

An important component of strategic planning is the process of monitoring and adjusting the developed plans, which allows the enterprise to respond in a timely manner to deviations from the goals, identify errors and adapt the strategy in accordance with changes in the external environment. Regular monitoring of the strategic plan implementation helps to identify which areas are the most promising and where adjustments are needed.

Control over the implementation of the strategic plan may include:

- ✦ assessment of competitiveness indicators, such as market share, financial performance, and customer loyalty;
- ✦ analysis of changes in the external environment, including actions of competitors, changes in customer needs and new technologies;
- ✦ assessment of the effectiveness of the introduction of planned innovations.

The process of adjusting the strategy increases the flexibility of the enterprise and allows it to quickly adapt to new conditions, which helps to strengthen its competitive position.

Strategic planning allows enterprises to adapt their activities to the changing external environment, optimize the use of resources and increase production efficiency. However, the implementation of strategic planning faces a number of challenges, including uncertainty of the external environment, lack of information and knowledge, limited resources, resistance to change, and difficulty in evaluating results.

CONCLUSIONS

Overall, strategic planning is a critical management tool that ensures the sustainability and growth of an enterprise, allowing it to remain relevant, competitive, and successful in a changing world. Strategic planning shows how a company can stand out from the competition and carve out a niche above the market with certain advantages. It is suitable for short-term and long-term goals and can be implemented on a regular basis. To minimize risks, planning provides for alternative ways of business development. Well-constructed strategic planning is useful for both young enterprises and those that have already established themselves above the market. ■

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ОСОБЛИВОСТІ ПРОЄКТНОГО УПРАВЛІННЯ ПІДПРИЄМСТВАМИ ЕНЕРГЕТИЧНОЇ ГАЛУЗІ

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Сотник В. В. Особливості проектного управління підприємствами енергетичної галузі

Метою дослідження є розкриття особливостей здійснення проектного управління підприємств енергетичної галузі та виявлення ризиків, які на нього впливають. У статті детально розглянуто місце енергетичної галузі серед інших секторів економіки країни, а також проаналізовано вплив підприємств цієї галузі на країну. Було акцентовано увагу на тому, що важливим завданням для держави залишається розвиток курсу зеленої енергетики, який можна реалізовувати через підприємства енергетичної галузі. Відповідно до енергетичної стратегії України визначено напрями розвитку відновлюваних джерел енергії, декарбонізації та можливості підвищення енергоефективності у відповідності до Європейського Зеленого Курсу. У зв'язку з цим було акцентовано увагу на тому, що підприємствам енергетичної галузі варто приймати участь в різних проєктах, які фінансуються не лише за власний рахунок, а й за рахунок коштів міжнародних організацій та державної підтримки. Крім цього підприємствам енергетичної галузі необхідно змінювати підходи до проектного управління, особливо це стосується фінансування. Визначено, що варто використовувати наступні методи фінансування інноваційних проєктів, а саме: проєктне фінансування, публічно-приватне партнерство, фінансування, яке відбувається через акціонерний капітал, фінансування шляхом випуску зелених облигацій, боргове фінансування, використання моделі Power Purchase Agreement, краудфандингу, лізинг обладнання. Крім цього під час дослідження було виокремлено напрями уникнення та зменшення внутрішніх і зовнішніх ризиків під час впровадження проєктів в підприємствах енергетичної галузі, зокрема вони полягають в пошуку перспективних проєктів, кваліфікованих кадрів, дефіцитного обладнання, які необхідні для впровадження проєктів, в разі необхідності проведення ремонту пошкоджених об'єктів для забезпечення безперебійної роботи; проведенні постійного моніторингу законодавчих змін; здійсненні повного аналізу політичної ситуації, яка є в країні, при цьому потрібно обов'язково зважувати всі позитивні та негативні сторони під час укладення угод для захисту власних інтересів; проведенні своєчасного моніторингу геополітичних та політичних подій; залученні екологічних організацій до взаємної співпраці та впровадження плану екологічного відновлення не лише для підприємств, а й для територій, на яких вони функціонують; здійсненні фінансового планування, збільшенні резервного фонду та веденні переговорів з різними фінансовими інституціями.

Ключові слова: інноваційні проєкти, енергетична галузь, підприємства, проєктне управління, фінансування.

Рис.: 2. **Бібл.:** 12.

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