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HUMAN CAPITAL AND HUMAN DEVELOPMENT CONCEPTS

Was defined the basic premise of human capital theory and the concept of human development, conducted a comparative analysis on the basis of which the contradictions and the interconnections of these concepts were found. The necessity of updating the economic methodology in the direction of trialistic approach to the study of the formation of human capital and human development was grounded. Was suggested a theoretical model of human development in the form of the triad which combines some elements of the analyzed theories into a single conceptual scheme.

Keywords: human capital, human development, trialistic approach.

Стрижак Е. Концепции человеческого капитала и человеческого развития.
Определены базовые предпосылки теории человеческого капитала и концепции человеческого развития, проведен их сравнительный анализ, на основе которого выявлены противоречия и взаимосвязи этих концепций. Обоснована необходимость обновления экономической методологии в направлении использования триалектического подхода к исследованию процессов формирования человеческого капитала и человеческого развития. Предложена теоретическая модель развития человека в форме триады, объединяющая отдельные элементы анализируемых концепций в единую концептуальную схему.

Ключевые слова: человеческий капитал, человеческое развитие, триалектический подход.

Background. The current social and economic crisis that Ukraine is experiencing reflects primarily on the most vulnerable segments of the population, effectively destroying the middle class, which recently began to emerge in our country. The rapid drop in revenue and consequently the standard of living in the country increase the proportion of the poor, including those among the working population, and cause the transition of poor strata of the population by world standards to abject poverty strata. The high number of internally displaced persons from the occupied territories, the soldiers who returned from the ATO area with injuries and disabilities, many people who lost their jobs due to recession in the economy, and so join the ranks of the marginalized. Very quickly increased the gap between

the most and least well off sectors of the population, increasing social stratification, and the lack of balanced and reasonable measures for social protection increases the already high social tension.

Difficult conditions our country faced require the development of science-based and balanced socio-economic policies focused on immediate solution of not only tax, fiscal, currency, customs and others problems, but also social problems because financial and economic issues can not be considered in isolation from issues of human development, decent working and living conditions for all members of society. Solving the task of coming out of a deep economic crisis should begin with the development and implementation of reforms to resolve economic and social problems, the introduction of measures to stabilize the production and the formation of an effective employment policy and implementation of social policy, which is to focus not only on providing targeted material assistance, but also to create new jobs and improve the quality of human capital.

Formation of social and economic policy corresponding to the current economic conditions can not be based on outdated principles and schemes of economics, that is why an update is needed towards economic methodology in the direction of adaptation of its theoretical achievements to the features of transformation of Ukraine's economy with a high degree of risk and uncertainty. The most popularized and presented in most economic textbooks neoclassical tools based on the allocation patterns of economic activity in developed countries are often found unsuitable for the application in terms of modern domestic economy that actualizes the need to develop its own methods adapted to the unstable socio-economic situation in Ukraine.

Analysis of recent research and publications. At each stage of social development the list of pressing problems changes, so the task of science is to provide adequate to trends and features of society answers to the questions that arise during the transition from one technological structure to another, to solve the problems that arise depending on the characteristics of the economy and society. Consequently, the deteriorating economic situation and the corresponding decline of living standards in Ukraine require scientific community to focus on solving social issues of the theoretical foundations and development of practical recommendations to improve the level of human development in the country.

Thematic field of the study of human factor in the economy, starting with grounding the human capital theory by G. Becker [1] and T. Schultz [2] and the development of the concept of human development by Mahboob-Ul-Hack [3], M. Desai [4] and A. Sen [5] to the latest scientific achievements of local scientists E. Libanova [6], A. Grishnova [7], L. Shaulska [8], B. Antoniuk [9], L. Halkiv [10], L. Beztesnai [11] et al., is developed quite thoroughly. However, despite significant scientific advances in this area, a number of issues are in need of improvement and development. In particular, it concerns the need for further study

of methodological principles of human capital theory and the concept of human development, identification of similarities and differences of these scientific trends to determine their relationship and improvement of the basis of methodological research tools of the human factor in the development of society.

The **aim** of the article – is to identify interconnections and contradictions of the concept of human capital and the theory of human development.

Materials and methods. The study used such methods: analysis and synthesis – to formulate goals and objectives of the study; comparative analysis – for comparison of the indices of human capital and human development of countries and for identifying and comparing the basic assumptions, identifying conflicts and the relationship of the concept of human development (CHD) and human capital theory (HCT); trialectic approach – to represent the model of human development in the form of the triad. Research materials were scientific works of local and foreign experts in the field of human development and human capital, data of international intergovernmental organizations and the State Statistics Committee of Ukraine.

Results. The decline in production and thus reduction of incomes in the background of depreciation reduces the purchasing power of citizens and total costs, which in turn leads to a further decline in the economy. It triggers a multiplier effect, and the macroeconomic policy of passive spending of borrowed money does not solve either social or economic problems, causing only increase of the country's debt. On the background of increasing public debt and the fall in output is seen deterioration of all labor market indicators. According to the State Statistics Committee [12] among the population aged 15–70 in 2015 compared to 2013–2014 was observed: reduction of economic activity from 64.9 % in 2013 to 62.4 % in 2014 and 62.4 % in 2015 and employment rate from 60.2 % to 56.6% and 56.7 % respectively; an increase in the unemployment rate (according to the methodology of the International Labour Organization (ILO) from 7.3 % to 9.3 % and 9.1 % and the load of the registered unemployed for 10 vacancies (vacant positions) from 110 to 145 and 189 people respectively. In the unemployed structure due to unemployment there was an increase in the proportion of redundant for economic reasons from 22.3 % in 2014 to 27.8 % in 2015. In the structure of the unemployed by the duration of job search significantly reduced the share of people looking for work for 3 months (11.3 %). However, doubled the proportion of long-term unemployed (those seeking job for 12 months and more). As a result, increased the average duration of unemployment (following ILO methodology) from 5 months in 2014 to 7 months in 2015.

Statistics show the difficult situation on the labor market in Ukraine. Problems in the labor market on the one hand are caused by the difficult

economic situation in the country, on the other – they exacerbate the situation: the decline in production causes a reduction in employment, which in turn leads to reduced consumer demand and accordingly more layoffs. Movement of a large number of citizens from employed to unemployed category results not only in lower levels and quality of life of the population, but contributes to the marginalization of certain social groups. As a consequence, it increases stratification in society and grows inequality. In this context the issues of stabilization in the labor market are particularly relevant. Stable employment has a positive effect not only on the corresponding increase in tax revenue, but also the quality of the human potential of society, as raising incomes allow to invest in development, health, training and more. The increase in tax revenues in the form of taxes on personal income increases total revenues and allows to direct these funds to social programs.

The latest Human Development Report (HDR) proved that the relationship between labor and human development is synergistic in nature. The work raises the level of human development, providing income and livelihood, contributing to reducing poverty and ensuring equitable growth. Human development, raising the level of health, knowledge, skills and awareness, increases human capital and extends the opportunities and choice range [13, p. 3]. Therefore a prerequisite for effective implementation of socio-economic policy is its focus on the development of the labor market and human resources. Theoretical basis of the study of human resources is presented in the concepts of human capital and human development. In this context, it seems appropriate to identify and compare basic premise of human capital theory and the concept of human development to determine their relationship (*table 1*).

The object of the research in both concepts, as it clearly follows from their name, is the man in the broad sense of their motives, aspirations, capabilities, knowledge and so on. Thus in the theory of human capital a person acts as an economic agent in the labor market and the rational investor in their capacity, who compares the cost of investment and expected benefits, and accordingly makes investments only if they payback in the future. Human capital, as well as other forms of capital, is seen as a value that increases over time and brings revenue to its owner. In contrast, in the concept of the human development a person and their development is seen as the goal of social progress and investment in people is regarded as social costs and is aimed at providing decent living conditions to them regardless of the fact if they will pay off or not. Accordingly, human capital theory considers the economically active population, i.e. the real and potential workforce, and the concept of human development focuses on all segments of the population without exclusions, including those that are not or will not be part of the workforce. So, despite the fact that the object of study of both concepts is the human, in HCT the human is seen as a factor

of production involved in the creation of additional product and source of national wealth, and in the CHD – as the goal of social progress.

Table 1

Comparative characteristic of basic premises of HCT and CHD
(developed by the author)

Key element	The theory of human capital	The concept of human development
Defining basic category	The combination of natural features and capabilities and acquired and developed skills which are inseparable from their carrier and owner, income and positive externalities, usage of which exceeds the total cost of formation	Fulfillment and realization of opportunities, rights, freedoms, needs and capabilities of the individual, the use of which contributes to the quality of life and welfare both of a subject of development and society
The main principle of research	Methodological individualism, which provides an explanation of social phenomena based on behavior of individuals to maximize their objective function	The methodological holism, which means public relations advantage over those individuals who are relatively secondary objectives of the system
Methodological paradigm	Economic imperialism	Human-centered approach
Human model used for analysis	REMM-Resourceful, Evaluating, Maximizing Man	SRSM-Socialized, Role-playing and Sanctioned Man
Purpose of the concept study	The capacities which generate revenues in the production of goods and services	Personal qualities, capabilities and human rights that give the opportunity to live a full life
The main hypothesis of research	The human ability is transformed into human capital in the labor market, bringing income during their use	Public revenue is directed at improving human development that contributes to quality of life and well-being

This basic contradiction between the concepts of human capital and human development is that despite the unity of the subject of study, in the HCT the main purpose of human development is the ability to get more revenue, and a human and their potential are seen as a means of receiving it, and in the CHD – on the contrary, the revenue is seen as a means of human development, and the main purpose of social development is a man and their potential.

The subject of the study in two theories analyzed are the processes of human qualities and capabilities development. However, as follows from the title, the theory of human capital focuses on those human qualities that have certain properties of capital and are able to generate revenue, describing the man primarily as a media and investor of human capital, and the concept of human development focuses on empowerment and human development

of personality, its implementation not only in skills, but also the rights and freedoms, thus considering not only economic, but all other aspects of human development – political, gender, environmental, freedom of speech, movement, expression and so on. In the theory of human capital investment is targeted to a person to increase productivity, which in turn affects the increase in wages and increase of aggregated income, and the concept of human development is to improve the welfare of people, thereby increasing the level and quality the lives of all members of society.

Despite the differences in purpose, both concepts justify the need for investment in human. However, if in the CHD education and health are considered primarily as a public benefit, in the HCT – as a means of raising revenue. As stated in the regional report on human development, "human development paradigm provides two simultaneous processes: the formation of human capabilities and their application in practice. Thus, this is a final point, the goal of social and political processes and the way to achieve this goal. The processes and outcomes of development provide increased choice, capacity and freedoms [14, p. 10]". No doubt that the stock of human capital in the society is important, but not less important is how to use it.

Research method. In human capital theory, a man is regarded from the standpoint of economic imperialism not as a sound many-sided person, but as a rational maximizer focused primarily on obtaining economic benefits from their actions, and investments in people – as a source of income, whether it be income of entrepreneurs or wage of the human capital owner as an employee. This narrow economical approach, although fit to explain many phenomena in the labor, insurance, educational services markets etc., has a limited application for the analysis of social phenomena which have non-market nature, but can influence the market and often affect, radically changing economic conditions and factors of economic agents. For example, rumors (even unconfirmed) of leading banks bankruptcy that appear from time to time in the media, affect the exchange rates and the amount of cash in public, leading to purely economic consequences. In the concept of human development analysis is based on the social, institutional, political and other factors, expanding the limits of the economic approach.

Research methodology. Evaluation of the index of human capital (Human Capital Index) is performed by the analytical group of the World Economic Forum in cooperation with the ILO, the Organization for Economic Cooperation and Development and consulting company Mercer Human Resource Consulting. Human Capital Index contains two horizontal themes – education and employment, which intersect with five vertical age group poles of the index (under 15; 15–24, 25–54, 55–64 and 65 and older). The two cross-cutting themes assess the success of the development of skills and human capacity through training and implementation of knowledge gained through productive employment. In general, human capital index includes 46 indicators, of which half is the result of disaggregation in terms

of education (primary, secondary and higher education) and labor market indicators (level of participation in the labor force, unemployment and underemployment). Human Capital Index (HCI) distributes all countries under one standard, measurement of countries is defined as "the distance to the ideal state". The values for each of the indicators are taken from public data originally compiled by international organizations such as the ILO, the United Nations (UN), United Nations Educational, Scientific and Cultural Organization (UNESCO), World Health Organization (WHO). In addition to the quantitative data, the index uses qualitative data survey of the World Economic Forum [15, p. 4–5].

Human Development Index (HDI) is calculated by experts of the UN Development Program, together with a group of independent international experts using in their work, along with analytical development, national statistics institutes and international organizations. HDI is calculated as the geometric mean (before 2010 – the arithmetic mean) of the index of life expectancy, level of education index and index of adjusted real GNI per capita (before 2010 – GDP). To convert indicators in the index on a scale from 0 to 1 are set minimum and maximum values (or targets marks):

- Life expectancy at birth – 20 and 85 years (before 2010 25 and 85 years);
- The average length of study – 0 and 15 (before to 2010 the literacy rate of the adult population);
- The expected duration of study – 0 and 18 (the maximum rate) (before to 2010 the combined share of the total contingent of students);
- Gross national income (GNI) per capita (2011 PPP USD) – USD 100 and USD 75 000 (before 2010 real GDP per capita (PPP USD) – USD 100 and USD 40 000) [16, p. 2].

Table 2 shows the top 20 countries according to the index of HC and HD for 2013–2016 (Compiled from existing reports).

From *table 2* can be seen that the top 20 countries include most EU countries and North America, and the majority also have high human capital indices according to the HDI. All 12 countries that during the years 2013–2016 were presented in the rankings, both according to IHC and HDI belong to developed ones, indicating a relationship between the levels of development of the country and its citizens. Ukraine was ranked 83 out of 187 in 2013 and 81 out of 188 according to HDI in 2015. According to the index of human capital Ukraine occupied 63 place in the ranking of 122 countries in 2013, 31-st in 2015 and 26-th in 2016. These significant differences in terms of two reports are due to the lack of revenue in the calculation of IHC in 2015. So, with human potential of sufficiently high level, with the introduction to the analysis of revenue indicator, Ukraine dramatically lowers in the international rankings. Thus, there is a paradoxical situation when Ukraine, having high levels of human capital according to the World Bank, at the same time has one of the lowest (in recent years – the lowest)

levels of per capita income in Europe, and this indicator is approaching the level of the least developed countries. Resolving this issue requires primarily the development and realization of socio-economic policies to promote employment and decent wages for employees. Implementation of appropriate measures should begin with the improvement of the methodological tools of investigating human factors of the economy, deepening the theoretical foundations of scientific concepts of human capital and human development.

Table 2

Comparison of top 20 countries on the basis of HC and HD indexes

Position	HDI, 2013 [17, p. 15]	IHC, 2013 [18, p. 12]	HDI, 2014 [13, p. 28]	IHC, 2015 [15, p. 10]	IHC, 2016 [19, p. 4]
1	<i>Norway</i>	<i>Switzerland</i>	<i>Norway</i>	<i>Finland</i>	<i>Finland</i>
2	<i>Australia</i>	<i>Finland</i>	<i>Australia</i>	<i>Norway</i>	<i>Norway</i>
3	<i>Switzerland</i>	<i>Singapore</i>	<i>Switzerland</i>	<i>Switzerland</i>	<i>Switzerland</i>
4	<i>Netherlands</i>	<i>Netherlands</i>	<i>Denmark</i>	<i>Canada</i>	<i>Japan</i>
5	<i>USA</i>	<i>Sweden</i>	<i>Netherlands</i>	<i>Japan</i>	<i>Sweden</i>
6	<i>Germany</i>	<i>Germany</i>	<i>Germany</i>	<i>Sweden</i>	<i>New Zealand</i>
7	<i>New Zealand</i>	<i>Norway</i>	<i>Ireland</i>	<i>Denmark</i>	<i>Denmark</i>
8	<i>Canada</i>	<i>Great Britain</i>	<i>USA</i>	<i>Netherlands</i>	<i>Netherlands</i>
9	<i>Singapore</i>	<i>Denmark</i>	<i>Canada</i>	<i>New Zealand</i>	<i>Canada</i>
10	<i>Denmark</i>	<i>Canada</i>	<i>New Zealand</i>	<i>Belgium</i>	<i>Belgium</i>
11	<i>Ireland</i>	<i>Belgium</i>	<i>Singapore</i>	<i>Austria</i>	<i>Germany</i>
12	<i>Sweden</i>	<i>New Zealand</i>	<i>Hong Kong</i>	<i>Ireland</i>	<i>Austria</i>
13	<i>Iceland</i>	<i>Austria</i>	<i>Liechtenstein</i>	<i>Australia</i>	<i>Singapore</i>
14	<i>Great Britain</i>	<i>Iceland</i>	<i>Great Britain</i>	<i>France</i>	<i>Ireland</i>
15	<i>Hong Kong</i>	<i>Japan</i>	<i>Sweden</i>	<i>Slovenia</i>	<i>Estonia</i>
16	<i>Republic of Korea</i>	<i>USA</i>	<i>Iceland</i>	<i>Estonia</i>	<i>Slovenia</i>
17	<i>Japan</i>	<i>Luxembourg</i>	<i>Republic of Korea</i>	<i>USA</i>	<i>France</i>
18	<i>Liechtenstein</i>	<i>Qatar</i>	<i>Israel</i>	<i>Lithuania</i>	<i>Australia</i>
19	<i>Israel</i>	<i>Australia</i>	<i>Luxembourg</i>	<i>Great Britain</i>	<i>Great Britain</i>
20	<i>France</i>	<i>Ireland</i>	<i>Japan</i>	<i>Iceland</i>	<i>Iceland</i>

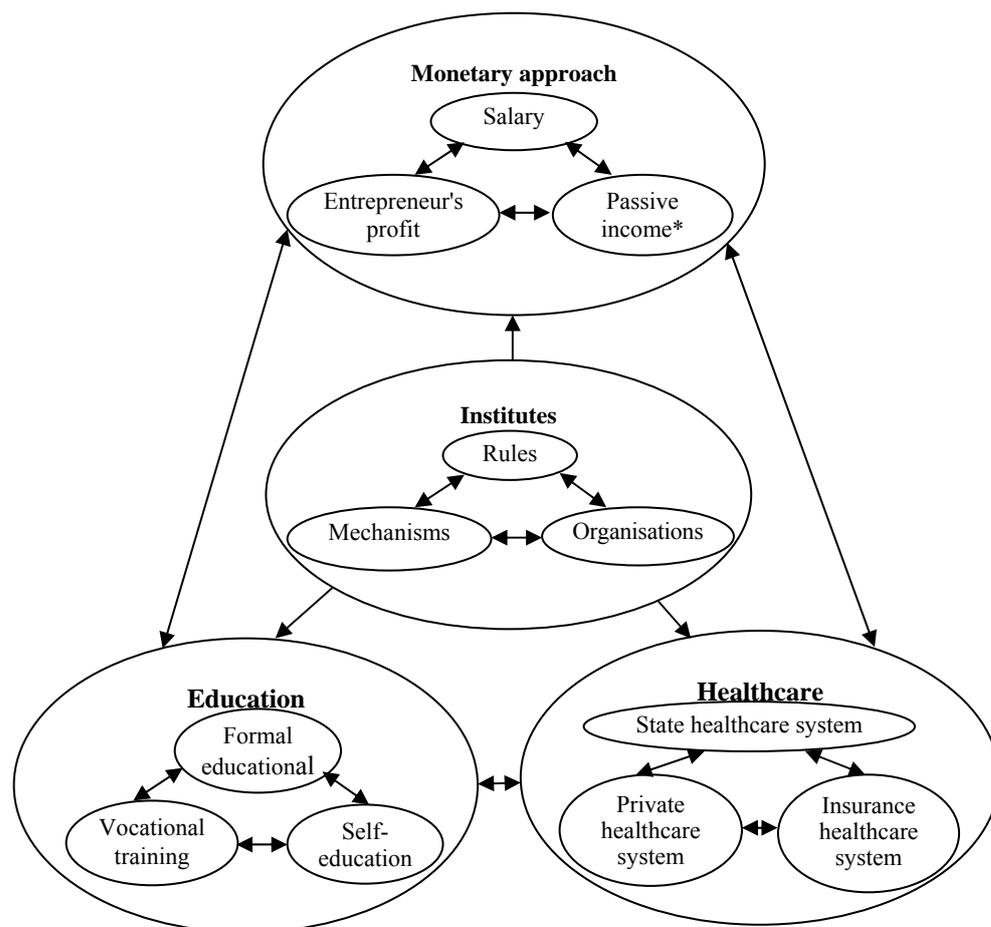
Note: In italics are those countries which during the years 2013–2016 were presented in both IHC and HDI ranking.

To study the processes of the human factor in the economy it is advisable to use triologic approach. G. Zadorozhnyy focuses on the fundamental for the national economic science problem "*triology*" as a method of knowledge that distinguishes the Orthodox religious and philosophical thought from Western dialectical analysis, in which the whole is broken into two opposites, the strongest of which absorbs another. In the format of dialectics (breaking the whole into the opposite side-part and the struggle

between them for domination-winning) is not covered the study of dynamic existence which is a division of the initial syncretical reality, that ultimately turns to pro-life and anti-humanism, which clearly indicates modern, transformed by the dialectical scenarios, *crisis* world. And it is evident that while in the thinking dominates dialectics, it is by definition impossible to start overcoming the crisis" [20, p. 118]. This difference of trialectic approach, as opposed to dialectical, according to P. Sergienko, is that the object of study (research) of trialectics is not a contradiction of opposites but their unity, communication, interaction. Method of trialectic knowledge – is mostly synthesis method, i.e. knowledge of a whole, but not the change (development) of opposite parts, and a single system of functional interaction: unity of connections division of the whole into parts and their relationship, synthesis, where the division (analysis) is separate and synthesis – a total feature of saving multi-level hierarchy of single existence [21]. That is, if the dialectical approach aims to identify causal relationships and contradictions, the essence of trialectic approach is reflected in consensus by building ternary diagrams or triads.

When using trialectic approach to the study of complex social and economic systems the basic element of the analysis is triad system which, by the definition of R. Barantsev, combines three equal elements, each of which may be involved in resolving conflicts between the other two as a measure of compromise, as arbitrator, as a factor in their coexistence in an integrated system [22]. Developing a systematic approach to analyzing systems based on triads, M. Huzairov justifies the conclusion that the analysis of complex system is reduced to the analysis of a set of triads, formed from the core factors included in the concept of the system. Each triad allows to create the simplest system tasks. The study of complex systems lies in the formulation and solution of system tasks based on triads. But we can not fully understand the nature of the system, examining only some of the triads, and have to learn all the complex set of interrelated triads belonging to the system [23, p. 33–34]. Consequently, the use of trialectic approach allows to integrate some elements of CHD and HCT into a single conceptual system, and the man can be regarded not as a subject of economic relations in the narrow sense, but as a multi-faceted personality in combination of social, economic and institutional aspects (*figure*).

Thus, the proposed model of human development based on building triads, which combines some elements of CHD and HCT into a single conceptual scheme provides for the implementation of a comprehensive study of a human from the standpoint of a multidisciplinary approach and can be extended by further decomposition of its components. In addition, certain provisions of HCT in their application to problems of human development will increase the possibility of expanding assess the relationship of rights and freedoms to the economic success of countries.



The model of human development in the form of a triad *
(developed by the author)

* The passive income includes all types of money income and payments not related to employment and business activities, dividends, interest, royalties, insurance payments, winning the lottery, government transfers, compensation and more.

Human development is primarily a qualitative change in the status of human capital and is characterized by the transition to a new level of implementation of needs and opportunities, provides the opportunity to participate in social life and development of capabilities and potential of every person, including the equitable distribution of funds and resources for achieving the goals of carriers of human capital. That human development should be aimed at society as a whole and not at certain privileged groups, classes or regions. Most scientists in a particular way equate human development with the provision of opportunities. This approach has some limitations, since some given opportunities to develop are not enough and still is needed individual's desire to develop, improve. That means that human development must include not only provision of opportunities, but

also their implementation. The subject should be of a proactive stance to implement the opportunities provided by the state or public institutions. If the state has provided development opportunities, but people do not use them (for example, a significant number of Gipsy children do not attend primary school even though they are entitled to free education), it is pointless to speak of human development, it actually refers to missed opportunities for human development. To implement the basic ideas of human development it is important to ensure not the development itself, but a possibility to use all features of human development together for the benefit of society as a whole.

Conclusion. Human development, unlike human capital, includes not only development capabilities, focused on income, also the qualities which are not used in the market environment and on the labor market, but make people a multifaceted personality. To create favorable conditions for human development, on the one hand, the state must ensure the rights and freedoms of citizens, on the other – citizens should use their capacity to benefit society. Thus, not only the society should be focused on human development, but people have to focus on the development of society.

Prospects for further research in this area lie in the further development of methodological tools of human capital theory and the concept of human development in their relationship to implement key provisions of these scientific theories to the conditions of transformation economy of Ukraine.

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Стрижак О. Концепції людського капіталу та людського розвитку.

Постановка проблеми. Стабільна зайнятість позитивно впливає на якість людського капіталу, оскільки зростання доходів дозволяє його власнику інвестувати кошти у розвиток, здоров'я, підвищення кваліфікації тощо. Тому впровадження заходів щодо формування ефективної політики зайнятості, а також реалізації соціальної політики, яка орієнтується на створення нових робочих місць та підвищення якості людського потенціалу, є передумовою вирішення проблеми виходу з економічної кризи.

Мета статті – виявлення взаємозв'язків та протиріч концепції людського капіталу та теорії людського розвитку.

Матеріали та методи. У дослідженні використано методи аналізу та синтезу; триалектичний підхід; метод порівняльного аналізу. Матеріалами дослідження виступили наукові праці вітчизняних та зарубіжних фахівців у сфері людського розвитку та людського капіталу, дані Міжнародних міждержавних організацій і Державного комітету статистики України.

Результати дослідження. Визначено базові передумови теорії людського капіталу та концепції людського розвитку. На основі порівняльного аналізу виявлено суперечності та взаємозв'язки цих концепцій. Обґрунтовано необхідність оновлення економічної методології у напрямку використання триалектичного підходу до дослідження процесів формування людського капіталу та людського розвитку. Запропоновано теоретичну модель розвитку людини у формі тріади, яка об'єднує окремі елементи аналізованих теорій в єдину концептуальну схему.

Висновки. Встановлено, що людський розвиток має включати не лише надання можливостей, а й їх реалізацію. Для створення максимально сприятливих умов для людського розвитку, з одного боку, держава повинна забезпечити можливість реалізації прав та свобод громадян, а з іншого – громадяни повинні використовувати свої спроможності на користь суспільства.

Ключові слова: людський капітал, людський розвиток, триалектичний підхід.