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THEORY OF CORPORATE INTEGRATION AND EFFECTIVE PARTNERSHIP OF LOGISTICS CHAIN ENTITIES JOINT-STOCK COMPANIES

The main task of the subjects of the supply chain today is to transform logistics chains in such a way that the participants of cooperation will cease to feel the shortcomings of the forms of organization of their activities. Therefore, the purpose of this study is to deepen the existing and develop new organizational and management proposals for improving the integration processes of the logistics chain in the company's activities. To achieve the goal, such general scientific research methods as analysis and synthesis, marketing analysis, comparison, classification, systematic approach, structural-logical generalization were used. As a result of the research it was found that one of the most noticeable trends in global markets recently is the need to integrate logistics operations and control the entire logistics system (production, supply, distribution), as well as to establish relationships between the customer company and the logistics service provider. The article proves that the existence of partnership interaction is possible only when the corresponding agreed relations are established in the logistics chain, as well as when certain conditions of interaction are met. It was determined that regardless of the content of logistics chain management processes, their essence boils down to the optimization of transaction costs when organizing supplies, and the competitiveness of enterprises in the consumer goods market depends on this today.

Keywords: *joint-stock company, form of organization, strategic directions of interaction, corporate integration, partnership, supply chain management, logistics chain, logistics system, logistics services market, transformation*.

Introduction. The enterprise, as an open dynamic system, uses a set of resources and the corresponding processes of their transformation to achieve the goals of its existence. The functioning and development of enterprises are impossible without the management of material, financial and information flows that make up the essence of logistics. Comprehensive integration of all elements of management of direct and reverse material, financial and informational resources, and their operational and reliable interaction determine economic and environmental effects, increasing the sustainability of the enterprise in a competitive market environment.

In view of this, there was a need for further development of theoretical provisions, substantiation of scientific and methodological approaches and development of practical recommendations for increasing the efficiency of integration processes of the logistics chain and transformation of the supply chain management system, taking into account the development trends of the global economy.

Literature review. Theoretical and methodological foundations, concepts, optimization models and strategies of supply chain management are outlined in a significant number of works by foreign (A. Beresford et al. [1], P. Blaik [2], D. Bowersox, D. Closs [3], H. Dźwigoł [4], A. Gunasekaran [5],

A. Harrison [6], L. Huemer [7], P. Kotler, K. Keller [8], A. Kwilinski [9], J.-J. Lambin [10], P. Murphy, D. Wood [11], D. Peppers, M. Rogers [12], V. Souitaris, G. Balabanis [13]) and Ukrainian researchers (M. Hryhorak [14], T. Kolodizieva [15], D. Kochubei [16], Ye. Krykavskyi et al. [17-19], Yu. Petrunia, T. Pasichnyk [20], V. Ponomarenko et al. [21] and others).

Theoretical analysis shows that in scientific sources on logistics problems:

the stages of determining an effective logistics chain regarding the introduction of new products at enterprises in the context of internationalization are proposed [22];

the peculiarities of the creation of supply chains in the conditions of international business and their corresponding restructuring, taking into account the specifics of logistics solutions in the conditions of globalization and competition were revealed [23];

an economic-mathematical model of supply management of commodity resources was developed, which takes into account the level of integration of participants within the supply chain [24];

identified risks in the system of customs regulation of international supply chains [25];

the main steps of risk management of supply chains of physical, physical-digital and digital products in the conditions of the digital economy are described; the author's formulation of the concept of "risk of the supply chain of physical products in the conditions of the digital economy" as an economic category that reflects the peculiarities of the perception by the management of enterprises – participants in the supply chain of objectively existing dangers and threats, the unreliability of various means and technologies, the level of knowledge, uncertainty and conflict, is provided, the lack of comprehensive information at the time of decision-making in the processes of the flow of material and its accompanying information flows in the entire supply chain [26];

the author's approach to defining the supply chain as a loop of a spiral nature of the main stages of transformation of primary resources into a final product satisfying consumer needs is substantiated [27];

scenarios of supply chain development (the world of digital networks, the world of regional networks, the world of local individualization, the world of special innovations) were considered based on the degree of integration and regional coverage according to forecast indicators without taking into account the impact of the pandemic; the main aspects of the recovery of supply chains, taking into account the pandemic, are highlighted in such areas as transparency in the supply chain, availability of stocks, realistic demand of the end consumer, optimization of production and distribution capacities, identification and preservation of logistics capacities, management of cash and net working capital [28];

it has been established that integrated logistics supply chains allow the most effective realization of the company's goals, to facilitate the company's exit from the economic crisis; the main ways of organizing cooperation of enterprises in supply chains are defined: informal and formal agreements of enterprises, creation of a strategic alliance or partnership, vertical integration; it has been proven that the construction of the logistics system of the enterprise according to the integrated type will allow reducing the total costs in the logistics channel and ensure the minimum price, which will increase the competitiveness of all participants in the chain [29; 30; 31].

However, despite such close attention to the outlined problem on the part of scientists, it remains relevant to conduct scientific research in the direction of transformation of approaches to the supply chains management, taking into account new challenges and threats.

The main **purpose** of the research is to deepen the existing and develop new organizational and management proposals for improving the integration processes of the logistics chain in enterprise activities.

Methods. The theoretical and methodological basis of the research is the provisions of the institutional theory, in particular paradigms of evolutionary development; theory of systems, information society, network economy; concepts of sustainable development, strategic, logistics and marketing management, supply chain management, corporate governance.

Analytical reviews of specialized periodicals, results of scientific research and materials of scientific and practical conferences, publications of foreign and domestic authors, collected by the authors in the process of research became the information base of the research.

Results and discussion. The enterprise, as an open dynamic system, uses a set of resources and the corresponding processes of their transformation to achieve the goals of its existence. The functioning

and development of enterprises are impossible without the management of material, financial and information flows that make up the essence of logistics. Comprehensive integration of all elements of management of direct and reverse material, financial and informational resources, and their operational and reliable interaction determine economic and environmental effects, increasing the sustainability of the enterprise in a competitive market environment.

The integration process in the socio-economic aspect is "the process of formation and formation of a new integrity, ordering and coordination in time and space of its development, which is designed to perform specified functions at the social, ecological and economic levels", which confirms the importance of logistics as a "built-in function" integration process while ensuring partnership interaction of enterprises [32].

Problems of integration of logistics chain subjects in the process of implementing their economic tasks are widely covered in foreign and domestic economic literature. So, for example, E. V. Krykavskyi et al. notes that "in a certain hypothetical dimension, specialization and massiveness exhaust themselves as potential reserves of obtaining an additional effect. Therefore, integration at qualitatively new levels of management becomes necessary, which is not the opposite of specialization as "despecialization", but integration in new planes and spheres. Thanks to such integration, higher-order "target" systems are formed compared to the integrated parts, and this creates an opportunity to obtain an additional effect, the source of which is the integration itself" [33].

The implementation of logistics concepts in the activities of enterprises introduces changes in the work of individual structural subdivisions and requires a reorientation of activities in the direction of integration of efforts to perform logistics functions, the identification of which occurs completely under the fulfillment of logistics tasks and changes in the essence of the logistics process [34].

Foreign authors D. Bowersox and D. Closs note that in order for logistics to bring maximum strategic benefits, all its functional links must work on the basis of integration, and emphasize that "when logistics operations are largely integrated and form a key area competencies, they serve as a source of strategic advantages. The confidence that the integration of the system provides significantly greater results than the results of managing individual functions constitutes the defining paradigm of logistics" [3]. The potential possibility of logistics integration is embedded in logistics itself, the economic nature of which is expressed in a systemic approach to solving the problems of organizing the movement of flows [35].

In economic literature, the integration function of logistics is characterized by the following provisions [15]: 1) integration of the function of forming business routes with the functions of determining transportation needs; 2) coordination of operational supply management and product transportation process; 3) cooperation in the management of goods traffic through the complex use of warehouses owned by entities that perform various logistics functions (supply and sales, transport, production, etc.); 4) optimization of aggregate costs for moving products due to the economic interest of transport, commercial organizations and the enterprises served by them in improving the processes of distribution and moving products; 5) development of specific functions of goods traffic management in combination with universal functions of the management process, their rational distribution among management subjects and concentration in the relevant structural divisions.

Justifying the expediency of logistics integration, researchers in this area draw attention to its advantages [6]:

1) improves the choice of strategic and tactical goals and, accordingly, the forms and methods of their research;

2) increases the effectiveness of developing alternative options for performing management tasks, planning the production and economic activities of enterprises;

3) increases the effectiveness of the use of evaluation criteria for management tasks to be solved to choose the best option;

4) makes it possible to apply methods that provide deeper and more reliable forecasting;

5) increases the efficiency of analysis and control of activities, covering all links of material and cash flows.

Summarizing the analysis of the publications, we can conclude that the issues of integration in the

field of logistics activity are relevant at the current stage of the economic development of enterprises. The theoretical developments of leading economists in this direction are supported by the conclusions of practitioners – as a rule, managers who, when making decisions about the management of material flows, recognize the need and effectiveness of the integration of logistics functions. At the same time, insufficient attention is paid to the applied aspects of this problem, in particular, to the justification of decisions regarding the integration of logistics activities in logistics chains.

In general, the term "integration" (lat. *integratio* – restoration and whole) characterizes the gradual convergence and unification of economic subjects in the process of their interaction (interaction, mutual penetration, mutual enrichment) [36].

The advantages that the subjects of logistics integration receive are characterized [34]:

- adaptability, quick reaction to changing circumstances;
- concentration of activities on priority areas of specialization, on unique processes;
- significant reduction of expenses, their rational structure, and increase incomes;
- preventing duplication of logistics operations;
- involvement in joint activities within the network of reliable partners.

A. Harrison and R. Van Hoek found that the strategies of the widest integration lead to the highest rates of significant improvement in the results of the enterprises, they presented this in the form of "arches of integration" (*Fig. 1*). In their opinion, wider integration reduces the uncertainty of the material flow in the logistics network, which, in turn, increases efficiency and reduces the time [6].

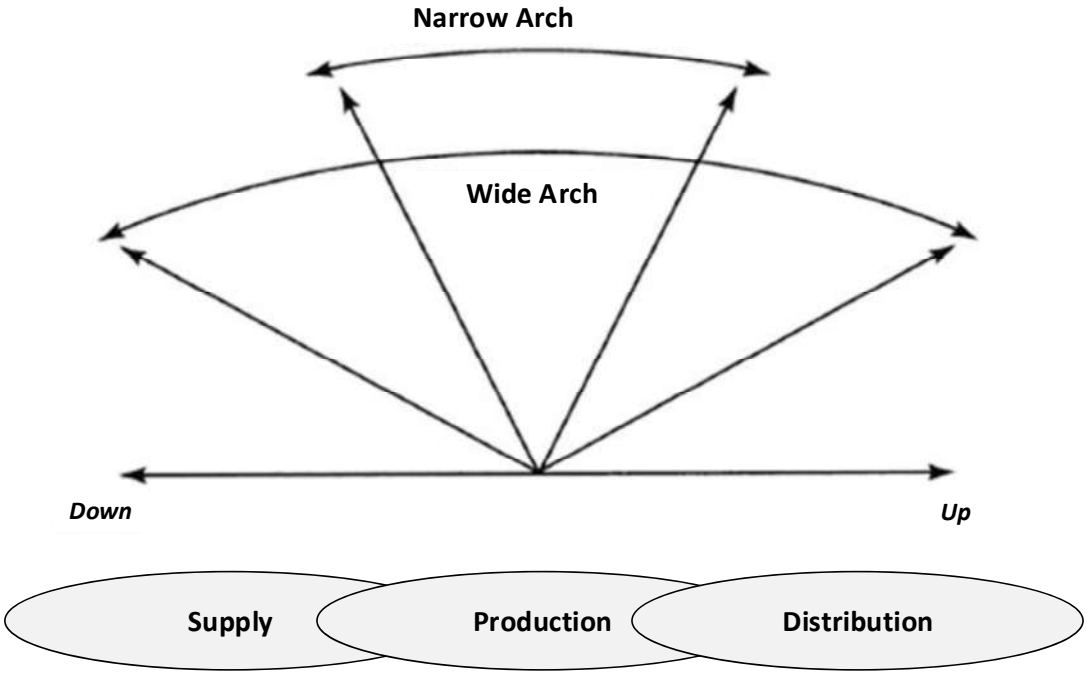

Figure 1 – Arches of integration

Source: designed on the basis of [6].

The semantic analysis of the category "integration" is related to some concepts that also affect the ontology of the subject area. As the scientist emphasizes S. Skochylias [35], can agree with the opinion of the author A. Pilypenko regarding the replacement of integration with the concept of a system approach, where the system is considered a complete entity. In addition, integration as a process requires the presence of a mechanism for real unification of the various elements of the enterprise into a single system. Therefore, the system captures the object form of the whole with a larger image, and integration reflects the processes of its acquisition.

Achieving the greatest result from logistics associations depends on compliance with the basic principles of logistics integration, in particular [37]:

- coordination of all processes of goods movement, starting with the purchase of raw materials and ending with the delivery of finished products to consumers; integration of management and control over material flows;

- a single technology of material flow, which covers the complex of services provided to the clients of the enterprise;

- the adaptation of logistics systems to the changing conditions of the internal and external environment of logistics;

- rational organization of all elements of logistics, ensuring their consistency.

Specific forms of logistics integration are determined by a wide variety of factors, starting from the technical consistency of the main links of the logistics chain and ending with economic and legal restrictions on activity. According to the criteria of the duration of cooperation and the degree of interaction, the following forms of integration formations are distinguished: temporary cooperation, network business structures, temporary alliances, stable partnership relations, strategic alliances [34].

A general approach to combining logistics functions within the enterprise (internal integration) is the gradual integration of logistics functions with the aim of achieving a synergistic effect from their combination, which can be determined using indicators [38]:

- elimination of unnecessary and unproductive logistics processes;
- rationalization of the organizational structure;
- increasing the "intelligibility" of the environment;
- optimization of the plane and factors of competition;
- systematic, total quality management;
- reduction of order fulfillment time;
- decrease in the level of aggregate stocks of raw materials, semi-finished products, and finished products;
- cost, product leadership, differentiation.

The synergistic effect of logistics develops at the stages of logistics integration at the operational level, at the level of logistics processes, covers the operational management of the material flow within the phase subsystems (supply, production, distribution), the next stage is the stage of cross-functional integration of the enterprise's spheres of activity, then it partially goes beyond the boundaries of the enterprise and involves the formation of inter-organizational logistics systems and supply chains and ends with the formation of complete logistics supply chains [33].

So, the above can be summarized by the scientific opinion of D. Bowersox and D. Closs [3], who identified five stages of evolutionary development of relations between logistics subjects (*Fig. 2*).

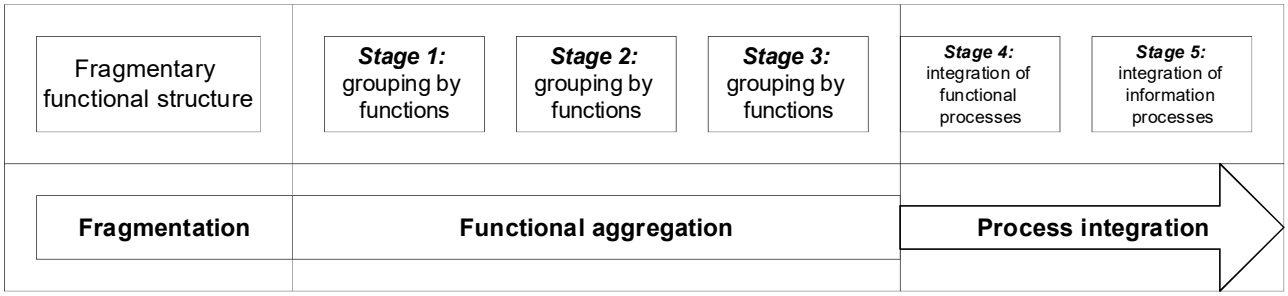

Figure 2 – Evolutionary development of relations between logistics entities

Source: compiled on the basis of [3].

As can be seen from *Figure 2*, the first three stages are directly related to the implementation of logistics operations. The fourth stage is associated with a qualitative transition from function management to process management. At this stage, the role of reliable information increases, and delegation of authority to independent divisions and company partners takes place.

To avoid the inconsistency of the main elements of the logistics system of the enterprise, it is advisable to supplement the internal integration with intra-industry and inter-industry logistics integration using the three possible directions shown in *Fig. 3*.

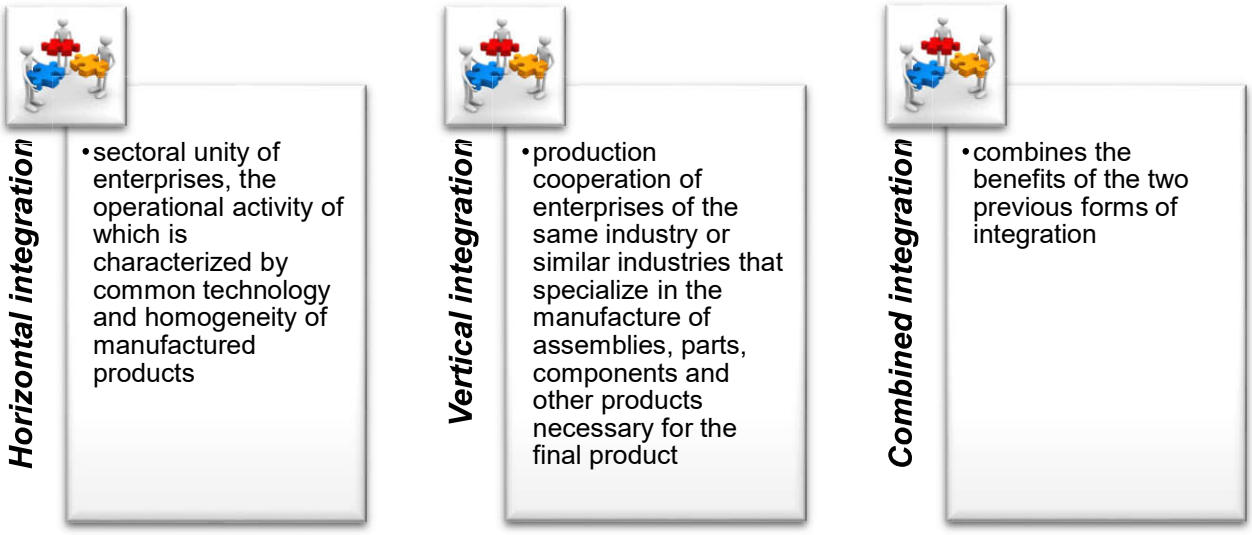

Figure 3 – The main directions of integration

Source: proposed by the authors based on generalization [34].

There is no universal option for external integration for all situations. In some cases, efforts aimed at creating and maintaining a specific form of integration may not justify themselves. Therefore, an analysis of current operations, future plans, potential partners, potential enterprises for purchase is necessary, which will help to find out to what extent a certain form of integration will be beneficial for a particular enterprise. Let's consider in *Table 1* the main ways of organizing the cooperation of enterprises in the logistics chain.

Table 1 – Ways of organizing cooperation between enterprises in the logistics chain

№	The method of organizing cooperation	Characteristic
1	Informal agreements of enterprises on the joint performance of certain actions	Companies can jointly purchase goods to receive discounts for the volume of purchases; combine cargo for transportation, reducing transportation costs; agree on the size of the packaging to facilitate cargo handling; use general lists of best suppliers. The advantages are flexibility and lack of obligations. Disadvantages include the fact that each of the parties can terminate cooperation without warning at any convenient time
2	Formal agreements of enterprises based on written contracts	The obligations of each of the parties are established, for example, counter deliveries (services) in exchange for favorable conditions of cooperation (for example, the supply of goods at fixed prices on the condition that the customer purchases a specified quantity of goods). The advantages are: a detailed description of the characteristics of cooperation, that is, each party clearly knows what it should do. The disadvantages are the loss of flexibility and the need to work in tougher conditions
3	Formation of a strategic alliance or partnership	The basis for such alliances is mutually beneficial cooperation in the past, when the enterprises have the confidence that none of them will be able to win if they start interacting with other partners. Strategic alliances involve long-term commitments of the parties that guarantee future orders and deliveries. This stability enables businesses to invest in improving their products and operations
4	Vertical integration	The level of vertical integration shows the extent to which the logistics chain belongs to one organization and can manifest itself in the following forms: 1) acquisition of a controlling stake in another company, thanks to which it is possible to influence operations to some extent, although not necessarily control them; 2) creation of a joint venture; 3) purchase of another organization, which is the most frequent option of external integration.

Source: compiled on the basis of [34].

The development of the idea of integration and effective partnership of logistics chain subjects can also be traced by the classification and characteristics of services in the logistics market (*Table 2*).

The principles of activity of integrated structures should be voluntariness, the community of economic interests, freedom to choose the organizational form of the integrated structure, equal rights of all participants of joint activities and mutual benefit of cooperation, and the contractual basis for organizing relations between participants and structures in general. Enterprises that are part of them retain their independence and rights as legal entities. Their activities are based on independently developed plans and programs of joint activities. They can create firms, centers, and production that will act according to the charter approved by the governing bodies of the integrated structure [34].

Table 2 – Characteristics of services on the logistics market

№	PL-provider	Description of the services provided by the PL-provider
1	First Party Logistics (1PL)	system in which all operations are performed by the cargo-owning company itself
2	Second Party Logistics (2PL)	system that makes it possible to perform a range of traditional services for the transportation and storage of goods;
3	Third Party Logistics (3PL)	system of additional services, which includes both traditional warehousing and intermediate storage (the so-called cross docking) of cargo, as well as the design and development of information systems, the use of subcontractor services
4	Fourth Party Logistics (4PL)	system that involves the combination of functions of all organizations involved in the process of supplying products. The tasks of the 4PL provider include planning, management and control of all logistics processes of the customer company in order to achieve longer-term strategic goals and expand business tasks
5	Fifth Party Logistics (5PL)	system, which is the so-called Internet logistics, is the planning, preparation, management and control of all components of a single chain of cargo transportation using electronic means of information

Source: compiled on the basis of [33; 34; 35; 38].

The need and conditions for the integration of logistics functions are determined by the strategic directions of activity and the determined logistics strategy of the enterprise. To achieve the desired integration of logistics functions and operations at the enterprise, it is necessary to consider internal activities and criteria that ensure the effective movement of material and information flows under the production program and the terms of the contract policy. Although internal integration is a necessary condition for successful operations, it alone is not sufficient to achieve the goals of a business enterprise. In the external competitive environment, the enterprise can function successfully only if it manages to involve suppliers and consumers in the integration and such external integration is carried out based on logistics chain management. It is important to determine those parameters, the observance of which will ensure the required level and result of integration [34].

In contrast to competitive relations, the existence of partnership interaction is possible only when appropriate agreed relations are established in the logistics chain, as well as under the following conditions (*Figure 4*):

- availability of sufficiently stable economic ties;
- the presence of a certain degree of organization of the economic flow;
- the existence of a system-wide goal shared by all participants of the logistics chain;
- the presence of a desire among all participants in the chain to find and establish a compromise.

Conclusions. Summarizing the above, it should also be noted that integration between enterprises is impossible without the concept of partnership since it is advisable for enterprises to focus on the economic essence and maximization of the effect of interaction, which generates complementary benefits of the integrated efforts of individual entities of the logistics chain.

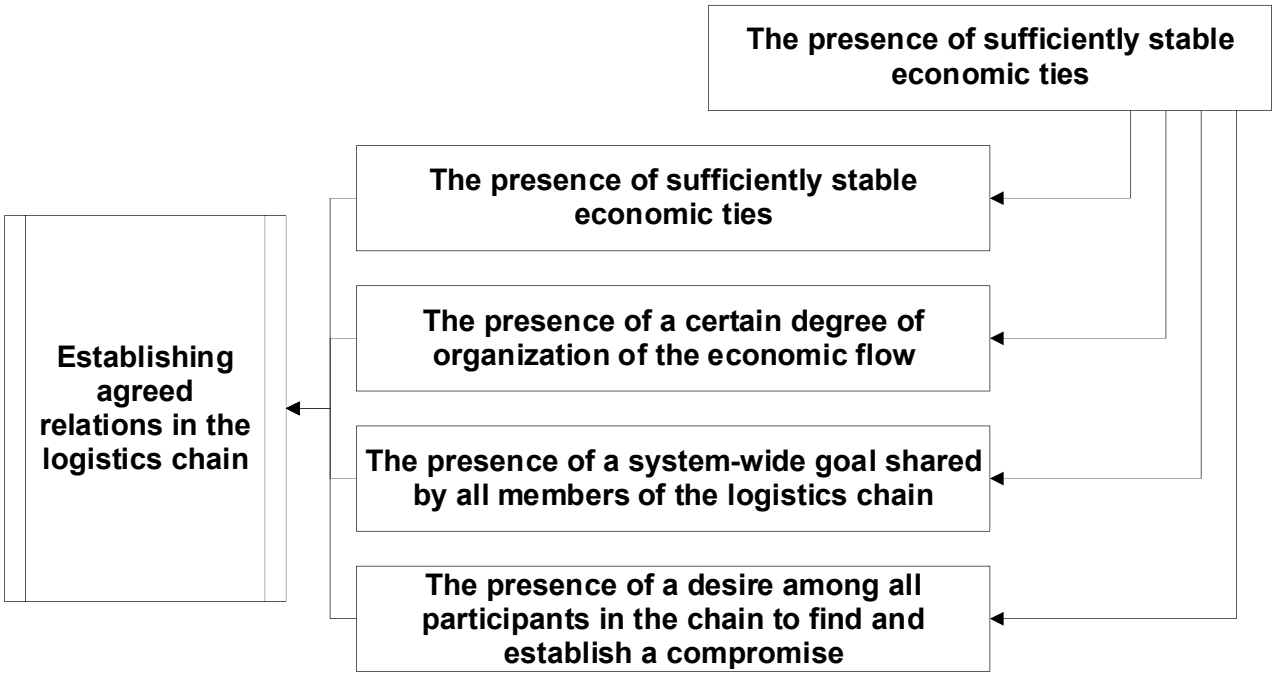

Figure 4 – Conditions of existence of partnership interaction between participants of the logistics chain

Source: compiled on the basis of [39; 40; 41].

So, today, one of the main tasks of the enterprise is the coordination of the interaction not only of its individual divisions that perform logistics functions, but also of partner organizations (suppliers, transporters, wholesalers), which, in turn, determines the emergence and functioning of integrated logistics structures. The integration of logistics cannot be isolated from other processes and phenomena at the enterprise; therefore, it is important to understand what obstacles may arise on the path of integration of logistics functions, what advantages and disadvantages this process creates for the enterprise. In practice, such obstacles arise in connection with the organizational structure, performance evaluation system, inventory management, information technologies, and the experience of operating a knowledge exchange system at the enterprise.

Therefore, an important point in the further development of enterprises – subjects of the logistics chain is the development of integrated forms of their functioning, which arise on a contractual or joint-stock basis, covering some or most of the services provided by intermediaries. These integration forms and methods have been widely developed in recent years and are manifested in the contractual relations of industrial firms with independent trade intermediaries, in the creation of associations of consumers and producers in economic relations, in the structuring of horizontal relations of intermediary organizations. It is promising to develop integration relationships between consumers and producers based on the creation of logistics networks, which makes it possible to reduce costs, inventory handling costs and management costs.

In further studies, it is planned to substantiate the conceptual provisions and develop practical recommendations regarding the transformation of the system of corporate integration of the subjects of the logistics chain of the joint-stock company.

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ТЕОРІЯ КОРПОРАТИВНОЇ ІНТЕГРАЦІЇ ТА ЕФЕКТИВНОГО ПАРТНЕРСТВА СУБ'ЄКТІВ ЛОГІСТИЧНОГО ЛАНЦЮГА АКЦІОНЕРНИХ ТОВАРИСТВ

Проблема. *Підприємство, як відкрита динамічна система, використовує для досягнення цілей свого функціонування сукупність ресурсів і відповідні процеси їх перетворення. Розвиток суб'єктів господарювання неможливий без управління матеріальними, фінансовими, транспортними та інформаційними потоками. Комплексна інтеграція усіх елементів управління прямими і зворотними матеріальними, фінансовими та інформаційними ресурсами, їх оперативна і дієва взаємодія зумовлюють синергетичний (економічний, соціальний, екологічний) ефект, підвищуючи стійкість підприємства в конкурентному середовищі. Тому на даний час виникла науково-практична проблема, яка потребує вирішення, – теоретичне обґрунтування та розроблення науково-методичних підходів і практичних рекомендацій щодо підвищення ефективності інтеграційних процесів логістичного ланцюга та трансформації системи управління ланцюгом поставок з урахуванням тенденцій розвитку глобальної економіки.*

Мета *цієї статті полягає у поглибленні наявних і розробленні принципово нових організаційно-управлінських пропозицій щодо вдосконалення процесів інтеграції логістичного ланцюга у діяльність акціонерного товариства. Для досягнення поставленої мети використано такі загальнонаукові методи дослідження, як аналіз і синтез, маркетинговий аналіз, порівняння, класифікація, системний підхід, структурно-логічне узагальнення.*

Теоретико-методологічною основою дослідження є положення інституційної теорії, зокрема парадигми еволюційного розвитку; теорія систем, інформаційне суспільство, мережева економіка; концепції сталого розвитку, стратегічного, логістичного та маркетингового менеджменту, управління ланцюгами постачань, корпоративного управління.

Результати. *Виявлено, що однією з найбільш помітних тенденцій на світових ринках останнім часом є необхідність інтеграції логістичних операцій і контролю за всією логістичною системою (постачання, виробництво, дистрибуція), а також налагодження взаємовідносин між клієнтами компанії та постачальника логістичних послуг. Доведено, що існування партнерської взаємодії можливе лише за умов встановлення відповідних узгоджених відносин у логістичному ланцюзі. Визначено, що незалежно від змісту процесів управління логістичними ланцюгами, їх сутність зводиться до оптимізації трансакційних витрат при організації постачань, від чого сьогодні залежить конкурентоспроможність підприємств на ринку споживчих товарів.*

Наукова новизна. *Обґрунтовано необхідність застосування механізму корпоративної інтеграції та ефективного партнерства суб'єктів логістичного ланцюга на прикладі акціонерного товариства.*

Висновки. *У результаті дослідження встановлено, що інтеграція між підприємствами неможлива без концепції партнерства, адже суб'єктам господарювання доцільно орієнтуватися на економічну сутність і максимізацію ефекту взаємодії. Це, у свою чергу, генерує взаємодоповнюючі переваги комплексних зусиль окремих суб'єктів логістичного ланцюга. Отже, сьогодні одним із головних завдань підприємства є координація взаємодії не лише його окремих підрозділів, які виконують логістичні функції, а й організацій-партнерів (постачальників, транспортників, оптовиків). Це зумовлює появу та функціонування інтегрованих логістичних структур. Доведено, що розвиток інтегрованих форм функціонування підприємств – суб'єктів логістичного ланцюга має ґрунтуватися на договірних або акціонерних засадах, охоплюючи частину або більшість послуг, що надаються посередниками. Ці інтеграційні форми й методи набули широкого розповсюдження в останні роки і виявляються у договірних відносинах промислових фірм з незалежними торговельними посередниками, у створенні об'єднань споживачів і виробників в економічних відносинах, у структуруванні горизонтальних зв'язків посередницьких організацій. Перспективним є розвиток інтеграційних зв'язків між споживачами та виробниками на основі створення логістичних мереж, що дає змогу скоротити витрати на управління ланцюгами постачань та організацію процесів логістичної діяльності.*

Ключові слова: *акціонерне товариство, форма організації, стратегічні напрями взаємодії, корпоративна інтеграція, партнерство, управління ланцюгом постачань, логістичний ланцюг, логістична система, ринок логістичних послуг, трансформація.*

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