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EVOLUTION OF THE THEORY OF HUMAN CAPITAL

This scientific article is aimed at identifying trends in the formation and evolution of human capital against the background of the rapid development of technological processes. When writing the article, various tools of scientific knowledge were used, such as comparative analysis, scientific abstraction and synthesis.

During the formation and transition to a new technological order, the role of man and human capital is being reviewed in economic processes. Currently, there are various variations that help to form ideas about the stages of development, the degree of influence, the essence and role of man and human capital in economic processes, while one should not forget about the retrospective (evaluative) analysis when considering the theory of human capital.

Nowadays, the theory of human capital is able to answer many pressing questions of modern civil society; These questions are largely caused by shifts and changes in innovative and technological development in the process of the 5th and 6th technological order. In these realities, the issue of accumulation and subsequent growth of human capital becomes on a par with other pressing issues of national development. It is worth remembering that high-quality and effective human capital has a huge impact on the development of the state's innovative economy.

Keywords: evolution, theory, human capital, economic development, technological shifts.

Introduction

By combining the time intervals of changes in technological patterns and the most important stages of human development, one can see how the theoretical

directions of human capital were analyzed and studied. The role and place of human capital, characterized by its essence, has evolved from the ideas of simply recognizing the need to account for human capital to measuring qualitative and quantitative influence. Based on evolution, the phenomenon of mutual influence was formed. This phenomenon is explained by the growth and accumulation of human capital, which in turn leads to shifts in technology. Changes in technology contribute to rapid changes in the labor market; these changes, in turn, impose additional conditions on human capital and determine the conditions for the genesis and accumulation of human capital.

Literature review

Since a person was no longer considered as one of the additional parts of capital, his role in the post-industrial economy was revised and incentives arose for the development of the concept of human capital [1]. The article by Cañibano and Potts examines the evolutionary path to human capital theory [2]. Showalter and Eide note that much research in the economics of education is based on human capital concepts [3]. The article by Robinson and Bowlus, «The evolution of the human capital of women», examines approaches related to the remuneration and professional skills of women, as well as the effectiveness of women's human capital [4]. Jablonski's article examines the evolution of human capital approaches in management, economics and finance [5].

Materials and methods

The study used various tools of scientific knowledge, for example, the method of synthesis, the method of scientific abstraction, and the method of comparative analysis. In the process of conducting a comparative analysis, all duplications of theories related to human capital were eliminated. Analyzing the world literature on human capital, most of the views of leading theorists were taken into account. We made an attempt to analyze, generalize and chronicle the reasons why scientists in a given time period relied on their judgments about human capital.

The article has an inductive direction; when studying various theoretical works, we tried to give a unified direction in defining the term «human capital». Using theoretical research methods, the article shows how the directions of the terminology «human capital» have developed. Over time, economic terms remain unchanged, unlike economic phenomena. So, the budgets of different countries change every year, but in the long term the concept and terminology do not change. Things are different with the term «human capital», which can dynamically change in its concept and content. Early definitions of «human capital» and current definitions are fundamentally different, so it is important to continually examine the evolution of the term.

Results and discussion

The process of development of the role of an individual in the economy and his influence on economic processes change as different economic paradigms change and economic relations in the economy improve. With the advent of the 21st century, the trend towards knowledge of human capital occurred through the development of innovative production.

The theoretical prerequisites and vision of human capital arose in the works of the classics of political economy W. Petty, A. Smith, K. Marx [6].

The famous English economist W. Petty, in his book «Political Arithmetic» (1676), was one of the first to try to evaluate human capital and compare it with real capital [7]. Despite his advanced ideas, W. Petty's concept did not gain widespread popularity during this period.

In the 18th and 19th centuries in the development of the concept of human capital, a hypothesis was put forward that a person is an economic resource. This hypothesis was put forward by representatives of the English School of Economics. However, they were opposed to the idea of the correlation of man with the material factors of production [8].

Such a «rollback» was facilitated by the beginning of the industrial revolution, the addition of machine labor to manual labor, and then its partial replacement. In the long term, economic development has become increasingly intertwined with the development of innovation, however, the role of man in these changes has not been fully reflected and insufficient attention has been paid to man, as well as his influence on innovation [9].

The concept of human capital proposed by W. Petty as one of the conditions for the productive power of the individual was subsequently applied in the works of A. Smith, who assessed labor qualifications as fixed capital [8].

Adam Smith builds his research on the hypothesis of unequal opportunities, that is, people by birth have differences, which is a direct advantage. Consequently, having absolute and comparative advantages relative to others in the field of education, personal and cultural development, an individual will develop exactly those special skills and abilities in respect of which he has competitive advantages. And if the chosen direction of development was determined correctly, then the emphasis will be placed on the direction in which the individual has a large set of competencies relative to others and, equally importantly, that the factor income from labor will be significantly higher.

Adam Smith compared a talented and educated person with an «expensive car» [10]. One of the central places in the evolution of human capital is the determination of its value, he determined that wages are the monetary price of labor corresponding to the level of development of the worker's productive forces

[11]. He rightly believed that the severity of labor and the skills of an employee are directly proportional to its value, which naturally leads to market competition.

J.-B. Say held similar thoughts to A. Smith. In his studies J.-B. Say wrote about the irreparable damage to national wealth from the loss of human capital as a result of various wars, epidemics, famine and other crisis phenomena [12].

In general, it can be noted that the key and important point in the teachings of the classics of political economy was the separation of the concept of «human capital». The classics were the first to consider the «economic man» as a unit of production in economic processes in the context of the economic model of man [13]. They qualitatively changed the role and place of a person in economic theory, as well as his unequal influence, depending on the individual's individual professional skills [7].

The opponents of individualistic views were representatives of the German historical school. In their opinion, productive activities can be considered only those that contribute to increasing the productivity of the national economy, including activities to increase the «spiritual» wealth of people. Friedrich List and his followers adhered to the idea of such individuals belonging to a higher level relative to the productive forces. Friedrich List believed that whoever creates «spiritual» capital should have a higher position than the productive forces. He was also convinced that the wealth of a people depended more on the state of human capital than on exchange value [11]. Thus, F. List in his writings spoke about the insignificant influence of exchange value on the prosperity of the nation. In the continuation of the ethical orientation of the side of economic life regarding human capital, the opinion of I. G. Tyunen was expressed. Exploring the ethical side of economic life, I. G. Tyunen believed that human freedom and dignity are an inviolable right that do not obey the laws of capital [14].

The political economy of Marxism as one of the categories of economic theory received close attention during the development of human capital [8]. This is largely due to the fact that theory is a complex doctrine and directly connects economics with other disciplines, such as history, philosophy and sociology.

As a result of the combination of disciplines, a unified concept of economic resources as «productive forces» emerged [8]. Although it is worth noting that for the first time the term «productive forces» was used in the works of F. Liszt, Marx's predecessor, in his monograph «The National System of Political Economy» (1841) [8].

K. Marx associated difficult work with the use of labor with higher training costs [7]. Having a greater value, it is embodied in objects of greater value over an equal period of time.

A special place in the development of modern ideas of Western economic thought about human capital is occupied by a number of provisions and representations of neoclassical economic thought – G. Gossen, S. Jevons, K. Menger, A. Marshall, J. Schumpeter, I. Fischer.

The neoclassical direction of economic theory explores the behavior of the «economic man», based on the subjective psychological direction of economic knowledge. It originated in the XIX century and takes marginal values as the main category of analysis, in other words, it has a marginalist approach. Time periods reveal various circumstances, for example, the XIX century is largely associated with the rapid development of market relations and, accordingly, this creates the prerequisites for research into issues of division of labor, competition in markets, as well as for studying the mechanisms of communication of economic entities. The increase in inequality between different segments of the population and the increase in disagreements between workers and employers are largely explained by new challenges in the market economy, which led the labor market to an unstable situation [7]. The current situation of instability prompted investors to invest financial resources in the development of human capital of labor resources, which in turn prompted them to keep track of investment expenses and measure their effectiveness [15].

The scientific research of the founder of the “Cambridge” school, economist A. Marshall, made a significant contribution to the formation of the current understanding of the theory of human capital in the neoclassical direction [11]. A. Marshall advocated for obtaining a generally accessible school education, increasing spending on educational purposes. He was firmly convinced that the stock and quality of human capital directly affects the general welfare of the population. «The most valuable capital is the one that is invested in a person. The absence of a human capital market as such and its inseparability from the carrier do not make it possible to define it as capital».

The modern concept of human capital emerged as a single direction in the 50-60s of the 20th century. The leading representatives of the modern theory of human capital are a number of American economists: T. Schultz and G. Becker, J. Mintzer [16]. The term «human capital» was first formulated by T. Schultz, he focused on the importance of education and its impact on economic growth. He defined «human capital» as an additional source of income, which was provided by the abilities, skills and knowledge of a person.

The American economist Gary Becker in his works especially highlighted the field of education, since the field of education is in many ways the driving force of human capital. He argued that the presence of education closely correlates

with the position and feeling of a person in society, his social place in society: his physical mental state and overall quality of life [17].

G. S. Becker represented the optimal points (equilibrium) of the education level are the intersection of the supply and demand curves, while the demand curve (D) represents the marginal rate of return on each dollar spent on education, and the supply curve (S) is a reflection of the marginal interest rate on each unit of funds spent, taken on credit to receive educational services.

According to G. S. Becker, the main difference between human capital and material capital is its inseparability with the bearer of this capital, in other words, knowledge cannot be separated from the owner of this knowledge, but the displacement of real assets from their owners is a common phenomenon. Therefore, it is possible to estimate the value of human capital, as G. S. Becker believed, only through rent for his possessions.

Thus, T. Schultz and G. S. Becker assessed the advantage in the level of wages of persons investing savings in their own professional development as a return on invested funds. Reflecting the differentiation in labor productivity, since the value of wages differs by the delta of investments invested in education [18].

G. S. Becker studied the issue of human capital comprehensively and revealed the relationship between the level of development of human capital and its consequences of influence on the standard of living of an individual (family structure, propensity to violence, propensity to violate the law, change of residence, learning ability, adaptation, degree of involvement in the upbringing of children, interest in culture, civil position, etc.). G. S. Becker was convinced that as human capital develops and improves, not only the individual's personal advantages increase, but also the general level of social well-being, therefore education is a kind of external effect and directly affects economic growth.

Simon Kuznets has made a significant contribution to the modern theory of human capital, since his scientific works are based on the fact that in nature there is a certain limit to the accumulation of human capital, after reaching this limit the economy has the opportunity to move to a more technological structure.

The concept of human capital was further developed in the works of J. Ben Porat, M. Blaug, W. Bowen, E. Denison, J. Kendrick, F. Makhlop, G. Psakharopoulos, L. Turow, B. Chiswick, E. Fromm, and others. Over time, economists, as a result of the increasing role of knowledge and education, focused on these factors as the main factors in the development of civilization [7].

The idea of the «reindustrialization» process arose in the 80s of the 20th century, thanks to the emergence of new directions in symbiotics, as well as new options in the development of the theory of human capital and thanks to the

scientific research of the classics of economic theory [11]. This concept is an optimistic manifestation of one of the ways of technological determinism.

New theories of economic growth are based on the principles of close correlation of investments in human capital and the achievement of technical progress, and the maintenance of high and high-quality education in the country is the key to stable economic growth. Polar opinions regarding the format of obtaining additional knowledge were displayed in different models, some scientists (P. Romer, K. Arrows) considered the learning by doing process – on-the-job education to be more effective, however, if we consider the R. Lucas model, it is based on on-the-job training, human capital in such a model is an independent economic resource [19]. An important breakthrough was the inclusion of a variable reflecting the quality of labor in the classical growth model, introducing new dependencies.

It must be emphasized that at the end of the 20th century and at the beginning of the 21st century there was a special interest in the issues and tasks of human capital development from disciplines interdisciplinary with economics, such as psychology, sociology, political science, etc. [20]. These circumstances entailed a significant expansion of the subject of research.

In post-Soviet countries, including Kazakhstan, the history of consideration of issues and tasks affecting human capital is largely associated with the formation of the Soviet economic school [11]. The idea of the value of a person and her receiving a high-quality education had an obligatory and indisputable priority, while the category of human capital in the absence of a market economy was ephemeral, and only in the post-Soviet period, when forming a market system, could human capital be talked about as a subject of research [20].

As a result of analyzing the evolution of the concept of human capital, we structured a diagram of the development of the theory of human capital according to the main time stages. Thus, using the option proposed by the Russian scientist V. A. Anikin, in Figure 1 a periodization scheme for the evolution of human capital development was drawn up [20]. Anikin V. V. identified six main periods of development:

- pre-industrial (until the end of the XVIII century);
- mass education (XIX – the first half of the XX century) – the stage of the prerequisite for the emergence of the concept of human capital;
- the late industrial stage (60-70s of the XX century) – the stage of technological breakthrough;
- the first post-industrial stage (1980-2000) - the growth of inequalities and the diversification of interpretations of human capital;
- the second post-industrial stage (2000-2010) – problems of human development and modern interpretations of human capital [20].

- new trends: human capital in the context of national development.

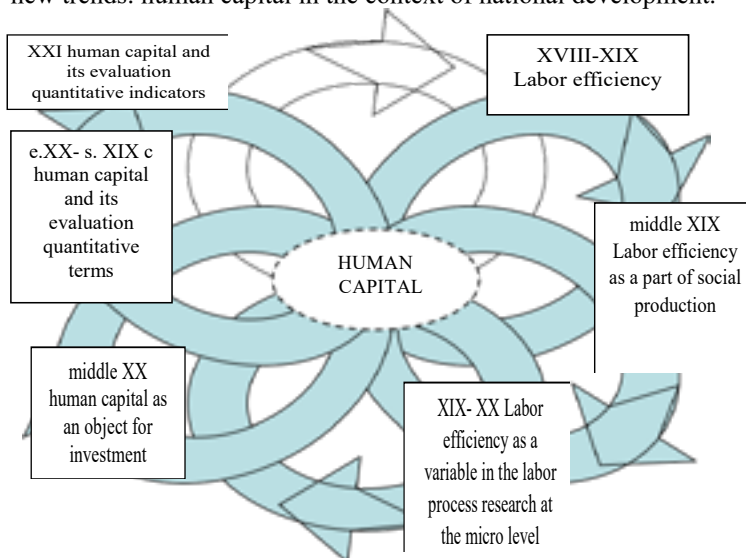


Figure 1 – The role of human capital.

Note – compiled by the authors

To date, the theory of human capital has been adapted to the new challenges of modern society, primarily dictated by technological changes and the tasks of innovative development.

Conclusion

An assessment of various definitions and theories of human capital development described in the scientific literature shows that, from its origins to the modern period, there are significant differences in their interpretation. It is also worth noting that despite the fact that a comprehensive analysis of the category of human capital has been systematically carried out, the categories have not yet been properly studied, moreover, the term human capital is complicated by additional qualitative characteristics. Nevertheless, a retrospective analysis revealed the mutual influence between the growth and accumulation of human capital, and technological shifts in the economy.

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АДАМ КАПИТАЛЫ ТЕОРИЯСЫНЫҢ ЭВОЛЮЦИЯСЫ

Бұл ғылыми мақала технологиялық құрылымдардың өзгеруі жағдайында адами капиталдың даму тенденцияларын анықтауға бағытталған. Мақаланы жазу кезінде синтез және талдау әдістері, индуктивті, тарихи және логикалық әдістер қолданылды.

Жаңа типті технологиялық құрылымның қалыптасуы адамның экономикадағы рөлінің өзгеруін болжайды. Қазіргі заманғы шындықта адам капиталының экономикадағы дамуы, ықпалы, мәні мен рөлі туралы көзқарасты қалыптастыратын әртүрлі вариациялар бар, дегенмен әртүрлі вариацияларды бағалау кезінде адам капиталының ретроспективті (бағалаушы) талдауын ұмытпау керек.

Бүгінгі таңда адами капитал теориясы қазіргі азаматтық қоғамның көптеген өзекті сұрақтарына жауап беруге қабілетті, бұл сұрақтар негізінен 5-ші және 6-шы технологиялық тәртіп процесіндегі инновациялар мен технологиялық дамудың ауысуы мен өзгеруіне байланысты. Бұл шындықта адами капиталды жинақтау және одан кейінгі өсу мәселесі ұлттық дамудың басқа да өзекті мәселелерімен қатар жүреді. Адамның сапалы және тиімді капиталы мемлекеттің инновациялық экономикасының дамуына үлкен әсер ететінін ұмытпаған жөн.

Кілтті сөздер: эволюция, теория, адами капитал, экономикалық даму, технологиялық өзгерістер.

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ЭВОЛЮЦИЯ ТЕОРИИ ЧЕЛОВЕЧЕСКОГО КАПИТАЛА

Данная научная статья направлена на выявление тенденций развития человеческого капитала в условиях изменения технологических укладов. При написании статьи использовались методы синтеза и анализа, индуктивный, исторический и логический методы.

Формирование нового типа технологического уклада предполагает изменение роли человека в экономике. В современных реалиях имеются различные вариации формирующие виденье о развитии, влиянии, сущности и роли человеческого капитала в экономике, вместе с тем при проведении оценки различных вариаций не стоит забывать про ретроспективный (оценочный) анализ человеческого капитала.

Сегодня теория человеческого каптала способна ответить на множество актуальных вопросов современного гражданского общества, данные вопросы во многом вызваны сдвигами и изменениями в инновациях и технологическом развитии в процессе 5 и 6 технологического уклада. В этих реалиях вопрос накопления и последующего роста человеческого капитала становится в один ряд с другими актуальными вопросами национального развития. Стоит не забывать, что качественный и эффективный человеческий капитал во много имеет огромное влияние на развитие инновационной экономики государства.

Ключевые слова: эволюция, теория, человеческий капитал, экономическое развитие, технологические сдвиги.

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