

UDC 37.07:[003.241.021]

**Borodiyenko O.**

*Doctor of Pedagogy,  
Professor of the Department of Documentation and Teaching Methods,  
Hryhoriy Skovoroda University in Pereyaslav, Ukraine;  
e-mail: oborodienko@ukr.net; ORCID ID: 0000-0001-9133-0344*

**Zlenko A.**

*Ph. D. in History,  
Head of the Department of Documentation and Teaching Methods,  
Hryhoriy Skovoroda University in Pereyaslav, Ukraine;  
e-mail: zlenko.am@ukr.net; ORCID ID: 0000-0002-5586-3984*

**Malykhina Y.**

*Doctor of Pedagogy, Ph. D. in Law,  
Head of the Department of Legal Support and Administration of Transport Activities,  
Ukrainian State University of Railway Transport, Kharkiv, Ukraine;  
e-mail: yana\_malykhina@ukr.net; ORCID ID: 0000-0002-3188-7033*

**Kim K.**

*Ph. D. in Psychology,  
Associate Professor of the Department of Legal Support and Administration of Transport Activities,  
Ukrainian State University of Railway Transport, Kharkiv, Ukraine;  
e-mail: katerinkim72@gmail.com; ORCID ID: 0000-0002-5231-2554*

**Diachkova N.**

*Ph. D. in Law,  
Associate Professor of the Department of Legal Support and Administration of Transport Activities,  
Ukrainian State University of Railway Transport, Kharkiv, Ukraine;  
e-mail: 23nataliia@gmail.com; ORCID ID: 0000-0003-4117-5432*

## **SOCIO-ECONOMIC PREREQUISITES OF STRATEGIC DEVELOPMENT OF EDUCATIONAL INSTITUTIONS**

**Abstract.** The purpose of the article is to substantiate the impact of socio-economic prerequisites on the strategic development of educational institutions at different levels.

The theoretical significance of the article is that based on the understanding of the works of Ukrainian and foreign scientists, the authors' own experience in the strategic management of educational institutions of different levels it was characterized socio-economic prerequisites of strategic development of educational institutions in the context of external (environmental) and internal (institutional) lenses of analysis; the competitive advantages of the strategic orientation of educational institutions are presented; the principles of strategic development of educational institutions are theoretically substantiated; the theory of stakeholders in the context of development strategies of studied institutions is characterized; the factor of competition in the market of educational services and the related need for marketing orientation of educational institutions is substantiated; the influence of the factor of digitalization of society on the strategic development of educational institutions is substantiated; the necessity of using materiality analysis in the process of strategic development is characterized; based on the criteria of importance to external stakeholders and the importance of the business and its internal stakeholders, models of strategic development of educational institutions are substantiated, their features, strengths and weaknesses, risks and effects of their implementation are characterized.

The practical significance of the article is that the authors have selected and adapted a number of methods of strategic development of educational institutions in the context of socio-economic prerequisites; strategic tasks of institution development in the context of further digitalization of society are revealed.

It is substantiated that in the process of strategic development of educational institutions it is expedient to adhere to certain principles, which will enable the adequacy of such development to

modern socio-economic realities. Such principles are the principle of positioning, synergy, integration, technological development, involvement, optimality.

In the process of strategic development of the educational institution it is advisable to use a number of methods (SWOT-analysis, PEST-analysis, benchmarking, road map), «As is and to be», strategic and foresight sessions, which will allow comprehensive consideration of socio-economic prerequisites of institution development, which should be considered in the context of external (environmental) and internal (institutional) lenses of the analysis. Taking into account criteria «importance to external stakeholders» and «importance to the business and its internal stakeholders» and creating a materiality matrix allowed to substantiate four models of strategic development of educational institutions (bureaucratic, business-oriented, communication and partnership), to characterize their features, strengths and weaknesses, risks and effects of their implementation.

**Keywords:** strategic development, strategic management, educational institutions, social and economic prerequisites, materiality analysis, materiality matrix.

**JEL Classification** I22, O43

Formulas: 0; fig.: 0; tabl.: 0; bibl.: 17.

**Бородієнко О. В.**

*доктор педагогічних наук,  
професор кафедри документознавства та методики навчання,  
Університет Григорія Сковороди в Переяславі, Україна;  
e-mail: oborodienko@ukr.net; ORCID ID: 0000-0001-9133-0344*

**Зленко А. М.**

*кандидат історичних наук,  
завідувач кафедри документознавства та методики навчання,  
Університет Григорія Сковороди в Переяславі, Україна;  
e-mail: zlenko.am@ukr.net; ORCID ID: 0000-0002-5586-3984*

**Малихіна Я. А.**

*доктор педагогічних наук, кандидат юридичних наук,  
завідувачка кафедри правового забезпечення та адміністрування транспортної діяльності  
Українського державного університету залізничного транспорту, Харків, Україна;  
e-mail: yana\_malyhina@ukr.net; ORCID ID: 0000-0002-3188-7033*

**Кім К. В.**

*кандидат психологічних наук,  
доцент кафедри правового забезпечення та адміністрування транспортної діяльності  
Українського державного університету залізничного транспорту, Харків, Україна;  
e-mail: katerinkim72@gmail.com; ORCID ID: 0000-0002-5231-2554*

**Д'ячкова Н. А.**

*кандидат юридичних наук,  
доцент кафедри правового забезпечення та адміністрування транспортної діяльності  
Українського державного університету залізничного транспорту, Харків, Україна;  
e-mail: 23nataliia@gmail.com; ORCID ID: 0000-0003-4117-5432*

## СОЦІАЛЬНО-ЕКОНОМІЧНІ ПЕРЕДУМОВИ СТРАТЕГІЧНОГО РОЗВИТКУ ЗАКЛАДІВ ОСВІТИ

**Анотація.** Метою статті є обґрунтування впливу соціально-економічних передумов стратегічного розвитку закладів освіти різних рівнів.

Теоретичне значення статті полягає в тому, що в ній на основі осмислення напрацювань українських і зарубіжних учених, власного досвіду авторів у стратегічному управлінні закладами освіти різних рівнів охарактеризовано соціально-економічні передумови стратегічного розвитку закладів освіти в контексті зовнішнього (середовищного) і внутрішнього (інституційного) зрізів аналізу; обґрунтовано конкурентні переваги

стратегічної зорієнтованості закладів освіти; теоретично обґрунтовано принципи стратегічного розвитку закладів освіти; осмислено теорію стейкхолдерів у контексті розбудови стратегій розвитку досліджуваної категорії інституцій; охарактеризовано чинник конкуренції на ринку освітніх послуг і пов'язану із цим необхідність маркетингової зорієнтованості закладів освіти; обґрунтовано вплив чинника цифровізації суспільства на стратегічний розвиток закладів освіти; обґрунтовано необхідність використання так званого аналізу значущості у процесі стратегічного розвитку; на основі врахування критеріїв «значущість для зовнішніх стейкхолдерів» і «значущість для бізнесу та внутрішніх стейкхолдерів» обґрунтовано моделі стратегічного розвитку закладів освіти, охарактеризовано їхні особливості, сильні і слабкі сторони, ризики та ефекти від упровадження.

Практичне значення статті полягає в тому, що було відібрано та адаптовано низку методів стратегічного розвитку закладів освіти в контексті врахування соціально-економічних передумов; запропоновано стратегічні завдання розвитку закладів у контексті подальшої цифровізації суспільства.

Обґрунтовано, що у процесі стратегічного розвитку закладів освіти доцільно дотримуватись визначених принципів. Це уможливить адекватність такого розвитку сучасним соціально-економічним реаліям. Такими принципами є принцип позиціонування, синергетичності, інтегрування, технологічності, залученості, оптимальності.

У процесі стратегічного розвитку закладу освіти доцільно використовувати низку методів [SWOT-аналіз, PEST-аналіз, бенчмаркінг, дорожня карта (RoadMap), «Як є і як має бути» (Asisandto be), стратегічні та форсайтні сесії], що уможливить усебічне врахування соціально-економічних передумов розвитку закладів, які варто розглядати в контексті зовнішнього (середовищного) і внутрішнього (інституційного) зрізів аналізу. Використання так званого аналізу значущості дозволяє виокремити пріоритетні напрями стратегічного розвитку, інвестування у які сприятимуть найкращим результатам. Урахування у процесі такого аналізу критеріїв «значущість для зовнішніх стейкхолдерів» і «значущість для бізнесу та внутрішніх стейкхолдерів» і створення так званої матриці значущості дало змогу обґрунтувати чотири моделі стратегічного розвитку закладів освіти (бюрократичну, бізнес-орієнтовану, комунікаційну і партнерську), охарактеризувати їхні особливості, сильні й слабкі сторони, ризики та ефекти від упровадження.

**Ключові слова:** стратегічний розвиток, стратегічний менеджмент, заклади освіти, соціально-економічні чинники, аналіз значущості, матриця значущості.

Формул: 0; рис.: 0; табл.: 0; бібл.: 17.

**Introduction.** Characteristic features of the current stage of development of educational institutions are the need to be open social systems that must take into account the constant changes in the socio-economic environment, adapt to new tendencies in social development and transform them into updated learning content, new educational and information technologies, strategies of interaction between participants of administrative and educational process, develop it in accordance with social change; methods of managing the institution should be characterized by strategic thinking, vision, free exchange of information, ability to work as a team etc. The rapid socio-economic changes taking place in Ukraine make it necessary to take them into account in the process of elaborating and implementing strategies for the development of educational institutions, and on the other hand create some difficulties in flexibly adapting these strategies to rapidly changing environmental conditions.

**Analysis of research and problem statement.** The issue of strategic development of educational institutions is related to the issue of effective management of educational institutions, which was studied by V. Bykov, O. Borodiyenko, G. Dमितrenko, L. Danylenko, L. Kalinin, L. Karamushka, Ya. Malykhina, B. Kobzar, V. Oganegov, V. Oliynyk, V. Lugovyi, T. Lomakina, T. Lukina, O. Novikov, N. Mursalimov, V. Ogarenko, N. Ostroverkhova, E. Pavlyutenkov, M. Potashnik, A. Prokopenko, L. Sergeeva, T. Sorochan, O. Skidina and others. Some issues of

strategic development (in particular, in the context of the implementation of the strategy-making process) were covered in works of B. Renkas who revealed the methodology of development a strategy for the general secondary education institutions. The attention of scientists and practitioners in this context deserves recommendations of the State Service for Educational Quality to develop a strategy for school development. From our point of view, in the process of elaborating a strategic vision it is important to take full account of external, in particular socio-economic prerequisites which influence these institutions, and generates significant, sometimes decisive influences. Undoubtedly, the process of taking into account modern socio-economic prerequisites in the process of substantiation and implementation of strategies for the development of educational institutions should be the subject of thorough interdisciplinary research. Thus, the purpose of the article is to substantiate the impact of socio-economic prerequisites on the strategic development of educational institutions at different levels.

**Research results.** At the present stage, the strategic orientation of the educational institution creates significant competitive advantages for it, in particular: reduction to a minimum of the negative consequences of changes in the external environment; the ability to study and take into account objective (internal and external) factors that shape changes in the activities of the institution; the opportunity to obtain the necessary information for managers to make appropriate strategic and tactical decisions; the opportunity to make the institution more manageable, because in the presence of strategic plans it is possible to compare the achieved results with the set goals, specified in the form of planned tasks and performance indicators; the possibility of establishing a more flexible system of incentives for teaching staff and increase its adaptability to change; ensuring the dynamism of change by accelerating practical action to implement strategic plans based on an appropriate system of coordination, control and analysis (Borodiyenko, 2020).

Analysis of scientific literature, strategic documents on the development of education on national level, authors' own experience of strategic management of educational institutions at different levels suggests that in the process of strategic management of educational institutions it should be taken into account specific principles: the principle of positioning educational institution (the essence of which is in development of a specific educational product (service), its conceptualization, branding, generation of unique competitive advantages, promotion in the market of educational services in accordance with a comprehensive promotion strategy, implementation of marketing-oriented and customer-oriented approaches, creation and dissemination of a positive image of the educational institution); the principle of synergy (taking into account in the process of strategizing the whole set of factors that affect the educational institution, in a retrospective-prognostic context); the principle of integration (understanding of the institution as an open socio-economic system, which is, on the one hand, influenced by a number of factors of social, economic, political and technological nature, and on the other — has a significant impact on the environment); the principle of technological development (implementation of strategic initiatives aimed at optimal implementation of ICT solutions in order to accelerate business processes, storage and dissemination of information, freeing up human and time resources to improve the efficiency of human-human interaction); principle of involvement (creation of conditions for comprehensive deepening of public-private partnership between educational institution and stakeholders, functioning of permanent and project forms of such interaction, involvement of stakeholders in the process of determining strategic directions of educational institutions development); the principle of optimality (concentrating in the process of determining the strategic directions of the institution's development on those initiatives and projects that, provided with optimal investment of resources, will have the maximum effect, expressed in terms of operational or financial efficiency).

In the process of making sound management decisions, especially at the stage of generating strategic initiatives for the development of the educational institution, it should be remembered that the institution is an open socio-economic system influenced by various factors not only internal but also external. Therefore, the logic of strategic development of the institution must take into account the impact of the environment. The optimal and effective process of implementing the technology of strategic management of the educational institution is possible through the use of a number of

methods, including SWOT-analysis — a tool for analyzing the strengths and weaknesses of the institution; PEST-analysis — a tool for analyzing the external environment of the institution; benchmarking — a tool for competitive analysis and ways to improve performance; Road Map — a tool for strategic planning; «As is and to be» — a tool for strategic goal setting; strategic and foresight sessions — tools for generating strategic initiatives and forecasting the strategic development of the institution.

For the purpose of structured and comprehensive analysis of environmental factors, PEST (PESTLE) analysis is used, which allows to identify socio-economic, political, technological, environmental and legislative factors in the development of educational institutions. Typically, these groups of factors are considered in the context of external (environmental) and internal (institutional) sections of the analysis (Cox, 2021; Matovic, 2020). Thus, external political factors that have a significant impact on the development of educational institutions may be: public policy (its priorities, vision of development budgets, staff, areas of science and technology), the strength of influence of various stakeholders (NGOs, trade unions, international organizations). Internal political factors are directly the development strategy of the educational institution, its personnel policy, budget structure, priority areas of development, restructuring, optimization, introduction of new management paradigms and more. External economic factors in the development of educational institutions can be: changes in the economic climate and taxation, changes in the specialization of regional labor markets, availability and multi-channel financing of institutions, cost of resources, general economic conditions etc. Accordingly, the internal economic factors may be: the results of financial and economic activities of the institution, the number of applicants, decisions on the structure of the budget etc. External social factors are public pressure, media, cultural trends and fashion, stakeholder expectations of the educational institution. Internal social factors can be the level of awareness of the institution's staff (on the main policies — environmental, performance, customer orientation), the level of motivation of staff and applicants, non-acceptance of innovation by certain social and age groups, staff turnover and more. Technological factors can be the level of infrastructure development, the level of use of ICT solutions, technological capacity of the service/product, etc.

Characterizing current political factors, in particular the priorities of the national strategy for education development, we can highlight its key ideas: at the level of education in general, strategic vectors are reforming the education system based on the philosophy of «human-centered» as a strategy of national education; modernization of the structure, content and organization of education on the basis of the competence approach, reorientation of the content of education for the purposes of sustainable development; creating and providing opportunities for the implementation of various educational models, educational institutions of various types and forms of ownership, various forms and means of education; ensuring the availability and continuity of lifelong learning; formation of a healthy environment, greening of education, development of valueological culture of participants in the educational process; development of scientific and innovative activities in education, improving the quality of education on an innovative basis; informatization of education, improvement of information-resource provision of education and science; creation of a modern material and technical base of the education system (President of Ukraine, 2013; MES, 2020).

Among the economic factors, we consider it necessary to single out the factor of competition in the market of educational services and the related need for marketing orientation of educational institutions. Given the processes taking place in the market of educational services (increasing competition, optimizing the networks of educational institutions of different levels (including vocational and higher education institutions), reducing the attractiveness of education in the domestic market and increasing the attractiveness of foreign providers) we support the idea that educational institutions «have increasingly been influenced by a competitive logic based on the creation of sustainable competitive advantages, which involves attracting and retaining more talented faculty and students, developing better research and teaching structures and improving the organizational image» (Taiguara de Freitas, 2020). The market-oriented trend of higher education makes the industrial attribute of higher education more prominent (Hong, 2019). Thus educational

institutions are the links of stakeholders; the essence of university governance is the «coordination mechanism of stakeholders in higher education», and the stakeholder model can be applied in the field of higher education (Hong, 2019).

The application of stakeholder theory to the analysis of the activities of education institutions involves identifying all stakeholders and identifying their interests and expectations. In terms of stakeholder theory, organizations exist to meet the needs of all stakeholders, and this is their main, fundamental goal. If the organization does not focus on the interests of stakeholders, it can hardly count on sustainable development. The interests of stakeholders do not remain unchanged. Therefore, an important task of management is the constant monitoring of these interests and the adaptation of the educational institution to their changes. The main principles of interaction between the educational institution and stakeholders are: «knowledge and information sharing, mutual trust, involvement in the decision-making process and alignment of stakeholders' interests in the strategic planning process, all of which create more value for organizations» (Taiguara de Freitas, 2020).

As students invest in material capital and human capital consumption services to become customers in higher education they are therefore identified as core stakeholders (Hong, 2019). Students also appear in two different roles: they are customers of educational institutions, as external stakeholders, being consumers of the educational services, spending financial resources to acquire this service. On the other hand, students «are co-producer of the activity, not only participating actively in the process but also generating added value due to this level of participation, thus placing them in an internal stakeholder role» (Taiguara de Freitas, 2020).

In understanding the strategic development of educational institutions, stakeholders — individuals and legal entities that are interested in the development of the education system as a whole or its individual levels, network or individual educational institutions and can influence or be influenced by the system — should be involved in the collective decision-making process. Convincing for us is the idea that «the active participation of stakeholder groups in the decision-making process creates more value for the organization» because «the multidimensional nature of decision-making requires the involvement of different perspectives», but «each stakeholder has a different perception of decision problems according to their own values, concerns and objectives, and thus, engaging other parties in this process is important» (Taiguara de Freitas, 2020). Thus, stakeholders are an important source of information about the external environment and a source of alternative views on the strategic development of educational institutions. In addition, stakeholder groups can contribute with their own knowledge, skills and experience to increase the exchange of ideas with organizations and reduce the likelihood of dissatisfaction among one or more groups, to increase understanding about the demands and preferences of stakeholder groups, which can potentially increase the efficiency with which a company allocates its resources and create more value for the organization (Taiguara de Freitas, 2020).

Another important factor that determines the strategic vectors of development of educational institutions is the further deepening of the level of digitalization in society. The current stage of ICT development and their incorporation into the professional and personal life forms certain new, unusual patterns of behavior, the features of which are: a significant density of communications in professional and social networks and the corresponding individual activity; blurring the boundaries between privacy and publicity, which creates the habit of communicating certain events and facts from life in these networks; wide and diverse involvement of people in various types of online activities offered by various services (Borodiyenko, 2020). In this regard, it is strategically important for educational institutions to take into account the factor of digitalization in the context of increasing the density of external communications (with organizations, institutions, authorities, the public, etc.), interviews of heads of institutions, maintaining websites of the institutions and pages on social networks in order to disseminate information about activities, involve citizens in virtual interaction, forming a positive image of the institution, participation of heads of institutions in various events held by stakeholders informing about strategic and operational tasks of the institution, etc.).

Therefore, an important strategic goal for educational institutions is the incorporation of ICT in order to improve internal business processes, which will allow by freeing up time resources of staff to focus on key aspects of interaction with stakeholders (Gates, 1999). It is important to create a common information platform for employees, which may include modern software solutions, such as communication software (Slack, Yammer, HipChat), cloud technologies (such as Google Drive), the use of a single platform for correspondence, calendaring, documents, etc. (Google, Apple, Microsoft) (Borodiyenko, 2020). Such platforms contain effective tools for receiving and processing current information, its accumulation in digital form and further use. It is also necessary to introduce the practice of using platforms for real-time virtual communication (Google Hangouts, Facebook live, YouTube live, Skype, Cisco Webex, Blackboard Collaborate, WebinarJam, Zoom, etc.) and the use of platforms for the management of the educational institution based on project management approach, which allows to share documents, create to-do lists, appoint responsible persons, add comments etc. (Basecamp, Jira, Trello, Asana and Smartsheet). The use of platforms for creating and making changes to the roadmap of the institution (the most popular services for creating roadmaps are Roadmunk, Hygger, Proofhub, Roadmap planner) allows quality visualization, collaboration of project teams on the document, its synchronization, binding processes to the global strategy, establishing cooperation with the target audience and integration with other systems (Borodiyenko, 2020).

In the process of taking into account socio-economic factors to identify an adequate strategy for the development of educational institutions its management should carry out this process through the prism of the so-called materiality analysis which is the core of any business strategy. It makes it possible to decide at what issues businesses need to prioritise and identify where to invest time and resources through two lenses: importance to external stakeholders and importance to the business and its internal stakeholders. Conducting a materiality analysis requires extensive data collection from both internal and external stakeholders (Calabrese, 2019).

If we take into account such criteria as «importance to external stakeholders» and «importance to the business and its internal stakeholders», we can create a so-called materiality matrix, which consists of four quadrants. In the upper left quadrant (low rates of taking into account the interests of external stakeholders and high rates of taking into account the interests of business and internal stakeholders) is the so-called business-oriented model of strategic development of the educational institution. In our opinion, it is characterized by the following features: concentrating efforts on improving staff quality, optimizing business processes, increasing the level of automation of business processes, focusing on revenue growth and cost optimization, improving financial and operational efficiency of the institution.

This model has unconditional advantages (improving the level of satisfaction of shareholders and staff, increasing their loyalty and motivation), however, is characterized by certain risks: failure to take into account the interests of external stakeholders may in prospective lead to the educational institution offering an educational product that does not meet the needs of regional labor markets. Besides, the financial autonomy of the institution is directly dependent on productive relationships with stakeholders (implementation of joint projects, direct financial assistance from employers, etc.).

In the lower left quadrant (low rates of taking into account the interests of external stakeholders and low rates of taking into account the interests of business and internal stakeholders) is the model of strategic development of the educational institution, which can be described as bureaucratic. It is characterized by formalized relationships within the institution (standardized business processes, regulated interaction, lack of project approach to tasks, rigid hierarchical management structure) and formal episodic relationships with stakeholders (generated by low level of perceived importance of the value of interaction with them). The bureaucratic model is essentially a stagnant model, the implementation of which in the long prospective will reduce the attractiveness of the educational offer of the institution in the market of educational services, the impossibility of constantly updating the material and technical base of the institution, outflow of personnel with an innovative type of thinking, etc.

In the lower right quadrant (high rates of taking into account the interests of external stakeholders and low rates of taking into account the interests of business and internal stakeholders) is the so-called communication model of strategic development of the educational institution. It is characterized by a high level of orientation of the institution to meet the interests and needs of external stakeholders, a large number of interactions with them (joint activities, creation of joint advisory bodies (councils, committees), their broad coverage in the information space, involvement of stakeholders in joint decision-making. Such a model, in our opinion, is characterized by certain risks, in particular, in the allocation of human, financial and time resources to processes that do not significantly affect the financial and operational activities of educational institutions, but rather image value; ensuring the quality of educational services, etc. The communication model of strategic development of the educational institution should be used in the transition phase (from autonomous functioning of the institution to its integration into the socio-economic system of the region) in order to establish cooperation with stakeholders and outline the priority areas of effective forms and directions of interaction.

The most effective model of strategic development is the so-called partnership model (located in the upper right quadrant, which represents high rates of consideration of the interests of external stakeholders and high rates of consideration of the interests of business and internal stakeholders). Such a model of strategic development of an educational institution is possible only if the management of the institution is aware of the value of effective interaction with stakeholders, as well as the implementation of internal quality assurance systems and the concept of results-based management. The partnership model is characterized by the following features: involvement of stakeholders in key business processes of the educational institution, introduction of automated CRM-systems (stakeholder interaction management systems), effective functioning of joint advisory bodies, in particular, supervisory boards of educational institutions, which include key members from the side of stakeholders), focus on continuous innovation development (in the context of technological, managerial and pedagogical innovations), implementation of risk management concept, ICT systems, etc. Implementation of the partnership model of strategic development will enable the sustainability of the educational institution, resource provision of flexible response to current challenges, increasing the competitiveness of the educational institution in the regional markets of educational services.

**Conclusions.** The analysis allowed us to draw the following conclusions: in the process of strategic development of educational institutions it is expedient to adhere to certain principles, which will enable the adequacy of such development to modern socio-economic realities. Such principles are the principle of positioning, synergy, integration, technological development, involvement, optimality. In the process of strategic development of the educational institution it is advisable to use a number of methods (SWOT-analysis, PEST-analysis, benchmarking, road map), «As is and to be», strategic and foresight sessions, which will allow comprehensive consideration of socio-economic factors of institution development, which should be considered in the context of external (environmental) and internal (institutional) lenses of the analysis. One of the key economic factors in the development of educational institutions is the factor of competition in the market of educational services, which creates the need for their (institutions) marketing orientation. Educational institutions «have increasingly been influenced by a competitive logic based on the creation of sustainable competitive advantages» (Tanguara de Freitas, 2020). In the process of taking into account socio-economic factors to identify an adequate strategy for the development of educational institutions it should be carried out this process through the prism of the so-called materiality analysis which makes it possible to decide at what issues businesses need to prioritise and identifies where to invest time and resources through two lenses: importance to external stakeholders and importance to the business and its internal stakeholders. Taking these criteria into account and creating a materiality matrix allowed us to substantiate four models of strategic development of educational institutions (bureaucratic, business-oriented, communication and partnership), to characterize their features, strengths and weaknesses, risks and effects of their implementation.

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Статтю рекомендовано до друку 02.02.2022 © Бородієнко О. В., Зленко А. М., Малихіна Я. А., Кім К. В., Д'ячкова Н. А.

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