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**THE ESSENCE AND SIGNIFICANCE OF BENCHMARKING IN STRATEGIC
PLANNING IN HIGHER EDUCATION INSTITUTIONS**

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Abstract. *The current study aims to analyze modern problematicity of the essence and significance of the benchmarking method in strategic planning in higher education institutions within Ukraine and world societies; to consider benchmarking as a systematic process of searching for the best pedagogical or educational practices; to implement innovative solutions, highly efficient educational procedures leading to higher productivity. For this purpose, history of benchmarking, its types and stages of implementation, as well as its advantages and disadvantages have been reviewed, and the subjects to which the benchmarking technique can be applied in educational organizations has been examined. It has highlighted that competition between business entities in education sector requires universities' constant improvement of their activities in all areas. The world's leading universities, associated with high quality education and research and traditionally top international rankings, are forced not to lose their high competitive position, but maintain their achievements and performance, and work ahead of the curve. The study states that the use of the benchmarking method in the competitive management mechanism at higher education institutions allows introducing the best experience, standards and working methods in providing education services, improving quality and efficiency, managing the professional development of academic staff, forming the new education concept, and assessing the leadership professionalism, but at the same time it has limitations.*

Key words: *benchmarking, higher education institutions, the best pedagogical and educational practices, improving performance, competition, to improve ranking positions.*

Introduction. The study of foreign experience in training highly qualified personnel in higher education institutions is one of the important areas of modern pedagogical science. The number of higher education institutions has been growing to accommodate the expansion of student numbers, and there are over 18,000 higher education institutions that offer at least a post-graduate degree or a four-year professional diploma in 180 countries [9].

Higher education institutions are also becoming more diverse: specializing in different levels of education, from short-cycle tertiary education to doctoral programmes; from traditionally academic-oriented to more professional programmes (including professional doctorates); from very subject-specialized to comprehensive institutions; from state, state supported,

private-run non-profit, to private for-profit institutions; and from open access to very selective institutions. Thus, higher education has economic, social, cultural and environmental impacts on the society at local, regional, national or global levels [17], [18].

Competition between business entities in education sector requires universities' constant improvement of their activities in all areas. The world's leading universities, associated with high quality education and research and traditionally top international rankings, are forced not to lose their high competitive position, but maintain their achievements and performance, and work ahead of the curve. For universities that are world leaders or aspiring to become such, a focus on innovation in all areas of activity is essential, which provide them with significant and unique

competitive advantages. For universities that are still trying to go international, it can be very useful to use such a tool, increasingly used in the corporate sector, but not sufficiently applied in the educational sphere, as benchmarking.

Therefore, the use of benchmarking method in the competitive management mechanism at higher education institutions allows introducing the best experience, standards and working methods in providing education services, improving quality and efficiency, managing the professional development of academic staff, forming the new education concept, and assessing the leadership professionalism, which ultimately leads to ensuring the sustainable development of educational institutions and achieving a given level of competitiveness. Furthermore, at present, higher education institution that provides educational services should be especially careful while developing its strategy. It's also worth noting that a significant number of Ukrainian higher education institutions are being sought new methods of promoting their curricula and trying to increase their competitiveness to strengthen their positions both at national and international levels.

The purpose of the study is to examine the essence and significance of benchmarking method in strategic planning in higher education institutions, considering it as a systematic process of searching for the best pedagogical or educational practice, making and implementing innovative solutions, highly efficient educational procedures leading to higher productivity. For this purpose, history of benchmarking, its types and stages of implementation, as well as advantages and disadvantages have been reviewed, and the subjects to which the benchmarking technique can be applied in educational organizations has been examined.

Methods of study. During the study, the following methods of cognition were used: data collection and sample, measures, synthesis, analysis, induction, deduction, comparative method. To solve the above-mentioned tasks, both the analysis and synthesis of scientific sources concerning the essence and significance of benchmarking method in strategic planning in higher education institutions has been applied.

Analysis of the latest studies and publications. The theoretical foundations of benchmarking as a holistic system, an integrated approach, a tool of the best practices, as well as practical concept in higher education are applied in fundamental works of foreign and domestic scholars, such as J. Alstete [3], R. Dattakumar, R. Jagadeesh [7], Khurram S. Bhutta, Faizul Huq [13], R. Camp [5], S. Cook [6], R. Epper [8], J. Nazarko, K. Kuzmicz, E. Szubzda-Prutis, J. Urban [15], M. Zairi [20], P. Leonard [21], P. Murphy [14], N. Vasilkova [19], Ye. Novykova [2], M. Kostyuk [1] and others. Foreign researchers: I. Thompson, N. Jackson [10], B. Karlöf, S. Östblom [11], J. Alstom, H. Lund, A. Schofield, D. Kempner [12], R. Farquard, K. Quartti and others study the peculiarities of benchmarking as a management tool in education.

Results. The essence of benchmarking lies in identifying the highest standards of excellence for products, services, or processes, and then making the improvements necessary to reach those standards that are commonly called "best practices". Benchmarking is neither just competitive analysis and number crunching, nor spying, espionage or stealing. It is a process to establish the ground for creative breakthroughs. It is a way to move away from tradition; the most effective vehicle to ensure continuous improvement is to focus on the basic processes that the organization runs and is a new and revolutionary perspective in benchmarking [13].

Benchmarking is often described as a systematic and continuous process aimed at implementing the best practices, a tool for improvement, achieved through comparison with other organizations [5], Zairi [20, 21], Cook [6] and Murphy [14]). Benchmarking is becoming a central instrument for improving the performance of higher education institutions. According to Epper [8] “if taken seriously and deployed properly, benchmarking can help colleges and universities position themselves for the new competitive environment that is at once mature and filled with potentials”. According to her, benchmarking starts with a self-examination and understanding of the institution’s different functions and internal procedures in order to be able to look for the best practices in other institutions and finally, adapting them to improve performance. Nazarko et al [15] identify learning as the most indispensable and important pillar of benchmarking, defining it as a continuum process that encompass both the identification of best practices and their adaptation. They also stress the importance of the creative adaptation of the best practices without copying and the continuity of the process.

It also worth noting that benchmarking has gone through the following evolutionary process in its development [2]:

- the first generation of benchmarking is interpreted as reengineering or retrospective analysis of the product;
- the second generation is competitive benchmarking that developed as a science in 1976 – 1986 thanks to the activities of the Xerox company;
- the third generation is process benchmarking, it develops in 1982-1986, when market leaders realize that it is easier to learn from enterprises outside

their sector or industry than by researching competitors;

- the fourth generation is strategic benchmarking, a systematic process aimed at evaluating alternatives, implementing strategies and improving performance characteristics based on the study of successful strategies of external partner enterprises;

- the fifth generation is global benchmarking, a future tool for organizing international exchanges, taking into account the culture and national characteristics of industrial engineering. The benchmarking process includes factors, research objects, basic rules of analysis, benchmarking stages, as well as approaches to training based on benchmarking.

Classification by UNESCO-CEPES [9] based on existing literature distinguish six types of benchmarking in the higher education sector [4]:

- internal benchmarking (comparing similar programmes in different components of one higher education institution);
- external competitive benchmarking (comparing performance in key areas based on institutions viewed as competitors);
- functional benchmarking (comparing single processes);
- trans-institutional benchmarking (across multiple institutions);
- implicit benchmarking (quasi-benchmarking looking at the production and publication of data/performance indicators which can be useful for meaningful cross-institutional comparative analysis; these are not voluntary but result from market pressures or coordinating agencies);
- generic benchmarking (looking at basic practice process or service) and process-based benchmarking (looking at processes by which results are achieved). The choice of particular type of benchmarking is defined by the

objectives of a university, its needs and requirements of an environment, available resources and potential for development, as well as by a possibility to implement this tool in a strategic management mechanism to ensure its competitiveness [19].

In the context of employing benchmarking method in strategic planning the Ukraine's higher education institutions have a promising opportunity to increase their own competitiveness through the following measures [1]:

- viewing its own functioning in the market from the outside and an objective analysis of its own shortcomings and advantages;
- researching the activities of other competing universities;
- using the competitors' successful experience in various areas (both in providing educational services and their promoting on the market);
- planning the further development of the university based on the competing universities' figures using a benchmarking study. Thus, the tools of benchmarking research include a system of streamlined strategies for further development of universities, analysis of competing universities and analysis of the educational services. Therefore, universities should focus on the use of innovative methods, forms and tools for managing all types of their own activities.

Thus, in the terms of constant global changes the education sector is influenced by considerable transformations: formation of the new knowledge-based education models; transition from basic education to lifelong one; emergence of significant competition between higher education institutions; dramatic changes in tastes, expectations of education subjects, etc. Thus, benchmarking as a systematic activity aimed at finding, evaluating and learning from the best practices of doing business can be beneficial, but it has limitations. Among the benchmarking

advantages, we can distinguish the ability to analyze own strengths and weaknesses objectively comparing with others, to determine strategic guidelines for own development in order to become a market leader, to generate original, fresh ideas on strategic planning in higher education institutions in both Ukrainian and foreign university-partners, to analyze the competitor's tactics and strategies as well as their performance. From this perspective, it seems to be essential for Ukrainian higher education institutions, striving to improve their international ranking positions, to use benchmarking in their strategic marketing research and strategic planning.

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СУТНІСТЬ ТА ВАЖЛИВІСТЬ БЕНЧМАРКІНГУ ДЛЯ СТРАТЕГІЧНОГО ПЛАНУВАННЯ У ВИЩИХ НАВЧАЛЬНИХ ЗАКЛАДАХ

Христюк С. Б.

Анотація. Дане дослідження присвячено аналізу сучасної проблематики поняття «сутності та важливості методу бенчмаркінгу для стратегічного планування у вищих навчальних закладах України та світу; бенчмаркінг розглядається як системний процес пошуку найкращих педагогічних та освітніх практик; впровадженню інноваційних рішень, аналізу вискоефективних освітніх процедур, які стимулюють зростання продуктивності праці. Для реалізації зазначеної мети було розглянуто метод бенчмаркінгу в еволюційній площині, подано його типологію та розкрито основні етапи впровадження, переваги та недоліки, техніку застосування в закладах освіти. В дослідженні наголошується, що, конкуренція між суб'єктами господарювання у сфері освіти вимагає від університетів постійного вдосконалення їх діяльності у всіх сферах. Провідні університети світу, які асоціюються з високоякісною освітою та науково-дослідною діяльністю та традиційно обіймають лідируючі позиції за міжнародними рейтингами, змушені не втрачати своїх високих конкурентних позицій, а зберегти свої досягнення та результативність та працювати на випередження. У дослідженні також зазначається, що використання методу бенчмаркінгу в конкурентному середовищі між вищими навчальними закладами дозволяє впроваджувати найкращий досвід, стандарти та методи роботи у наданні освітніх послуг, покращувати якість та ефективність, керувати професійним розвитком викладачів, формувати нові концепції освіти та оцінювати професіоналізм керівного складу, але в той же час він має певні обмеження.

Ключові слова: бенчмаркінг, вищі навчальні заклади, найкращі педагогічні та освітні практики, підвищення ефективності / успішності, конкуренція, покращення рейтингових позицій.