

I. A. Bogoslov, PhD Student, Teaching Assist.
ORCID ID: 0000-0001-5834-8710
Lucian Blaga University of Sibiu, Sibiu, Romania,
M. R. Georgescu, PhD, Prof.
ORCID ID: 0000-0002-7022-3715
Alexandru Ioan Cuza University of Iasi, Iasi, Romania,
A. G. Pitic, PhD, Assist. Prof.
ORCID ID: 0000-0003-0104-5430
Lucian Blaga University of Sibiu, Sibiu, Romania

LINKING FACEBOOK TO WORDPRESS FOR EDUCATIONAL PURPOSES – A PROPOSED ARCHITECTURE SUSTAINING SOCIAL LEARNING

Ensuring social educational processes does not only represent a trend in terms of the evolution of e-Learning systems, but also one of the main points of interest targeted by the developers of certain social platforms. In fact, raising awareness with respect to the importance of using Social Media tools in education leads to a two-way approach: both by integrating social tools into e-Learning systems and by integrating learning facilities into Social Media platforms.

Over time, the social network Facebook has benefited from intense use at global level, including in e-Learning processes. In order to meet the current needs in terms of teaching and learning, Facebook has provided users with built-in opportunities to facilitate social learning processes. However, expanding the Social Learning features integrated in Facebook can be a challenge at present, because of the policies imposed for the social network.

The present article outlines a proposed architecture for extending the Social Learning functionalities offered within Facebook Groups by ensuring the correlation with WordPress open-source CMS. Aspects related to how the correlation between the two platforms can be ensured, the necessary tools and the steps involved will be discussed. Also, the main implications and advantages offered by such an architecture and the identified limitations will be highlighted.

Keywords: Educational Technology, Social Learning, Social Media, Facebook, WordPress, Open-Source CMS.

Introduction. In the current context of the modern world, the concepts of evolution, development and change are often associated with digitalization. We are witnessing a continuous revolution in the ICT field, with multiple influences on all other activities in everyday life. The human factor transition to the digital environment is sustained by the many recognized benefits of technology.

Not only the ordinary human activities undergone changes with the rise of digitalization, but also the basic behavioural characteristics of individuals shifted. The human being, often characterized as a social being, experiences needs such as communicating, collaborating or being surrounded by others. Nowadays, as a result of digitalization, socializing processes acquire other meanings, being increasingly fulfilled through modern online means.

With an estimated number of about 3.6 billion users globally in 2020 [1], social networks are no longer just a trend, but a lifestyle. An integrated part of our lives, Social Media becomes the main mean by which we facilitate the transfer of information, communicate and keep in touch with others.

The new paradigm of socializing determines the need to adapt all areas and activities based on communities with common interests. Providing a familiar work environment to society leads to meeting the current needs of the community members and, consequently, increases the productivity and efficiency of the processes carried out.

As education represents one of the basic pillars of a society, we consider it critical to focus on this topic. The teaching and learning processes constitute, in the vast majority of situations, the dissemination of information, their understanding, assimilation and development within specific communities.

Based on the aforementioned considerations regarding communities, we can refer to educational processes as part of those activities within which Social Media tools make their presence felt. In fact, the online presence on social networks has become a major point of interest in terms of educational activities, the concept of Social Learning itself gaining new connotations.

Connectivism, representing the most recent learning paradigm, refers to the ability of individuals to process information by establishing connections. Currently, this theory of learning is associated with the opportunities offered through Internet-based technologies. Thus, Social Learning focuses on the development of educational processes using online Social Media tools, allowing users to learn in a collaborative environment. [2; 3]

Approaching social educational processes represents one of the points of interest targeted by the developers of certain social platforms. In fact, raising awareness of the importance of using Social Media tools in education leads to a two-way approach: both by integrating social tools into e-Learning systems and by integrating learning facilities into Social Media tools.

Representing the most popular Social Media platform at the global level, with over 2.6 billion monthly active users [4], Facebook has benefited over time from an intense use in educational processes. Understanding the need to integrate Social Media into e-Learning processes, Facebook has diversified its services by integrating opportunities to support Social Learning.

On the other hand, the evolution of open-source technologies has increasingly allowed the development of online educational tools, the most used platform of this type being WordPress. Thus, since Facebook's built-in Social Learning services are in a relatively early stage of development, a solution regarding the extension of these facilities could be the integration with WordPress.

Given the aspects mentioned above, the present paper aims to identify the main possibilities to ensure the association between Facebook and WordPress in order to support Social Learning. In this regard, the proposed architecture will be discussed so as to highlight the potential benefits and limitations identified.

Facebook Social Learning Facilities

In the last decade, using Facebook in educational processes became an intensely debated topic in the academic world. Regarding the main directions of application, existing research on this topic often highlights aspects related to the use of Facebook in education as a

collaborative medium, means of communication, virtual learning platform for mentoring, debates, advice and language learning [5].

With respect to the Facebook tools used in teaching and learning processes, they can range from the strict use of personal profiles for facilitating the information exchange, to the existence of communities such as Facebook Pages or Facebook Groups. However, the complementary use of Social Media tools in traditional educational processes often involves limiting them to real-life educational communities in the form of classes or courses. Therefore, although the facilities offered by the discussed social network are diverse and with varying degrees of complexity, the groups, in particular, represent a powerful tool for use in education.

Aspects regarding the use of Facebook Groups in education are also addressed by many of the existing research in the literature, reporting to a large extent positive effects on learning outcomes, communication, collaboration and connection between participants [6; 7; 8; 9; 10].

Understanding the increased potential of group type instruments for use in education, Facebook developers have approached a new perspective on them, integrating options specific to digital learning management systems. In this sense, the Social Learning facilities offered to users represent, in fact, a new typology of the basic Facebook Groups. Social Learning functions were introduced in April 2019, maintaining the basic facilities of a Facebook Group, but inserting additional options to support the teaching and learning processes.

In general, the main features of digital learning management systems refer to: ensuring asynchronous and synchronous communication, development and delivery of educational content, formative and summative assessment and classroom and users management [11]. Facebook has taken over and largely integrated this structure, which is materialized by offering specific additional facilities compared to a regular group [12]:

- Posts can be organized on modules, and their order can be customized;
- The members of the group have the opportunity to go through the available modules and to notify the administrator upon their completion;
- Administrators can view group statistics and details on completing a module or post.

Testing these means of learning, i.e. the Facebook Social Learning Groups through direct use determined the identification of other related features, of great importance in the current context. Among them we can mention: the possibility of creating and distributing educational posts based on text; the possibility to distribute educational media content (images, video, live video, audio, etc.); interaction in the form of discussions based on live comments or videoconferences; integrated evaluation means such as grid tests; the existence of collaborative documents; the ability to label educational posts; the possibility of holding online events; the possibility of creating questionnaires; capability of accessing the educational tool from mobile devices.

Therefore, we observe the direct orientation of Facebook Social Learning Groups towards the structure of an ordinary e-Learning system of the LMS type. Although this approach is in a relatively recent phase of development, we consider it optimal to choose it as a starting point for the proposed architecture.

Linking Facebook to WordPress

The use of basic facilities may have certain limitations compared to the needs of the user. The needs of users are constantly changing, as are the possibilities related to technology. Since the use of Facebook Social Learning Groups actually involves the use of tools made available to users by Facebook developers, the natural question arises: *How can these facilities be extended?*

Thus, a different approach is needed, involving the use of external technologies in order to expand existing possibilities. In this regard, open-source software tools represent one of the easiest alternatives enhancing efficiency in terms of developing online learning systems, as well as integrating with other tools, including existing social platforms.

WordPress CMS

In order to establish an architecture that allows integration with the desired social network, namely Facebook, the open-source WordPress platform was chosen. Launched in 2003, the WordPress platform has constantly evolved, at present being the most popular and used content management system (CMS) in the world, feeding approximately 38% of all existing sites [13]. The popularity of the platform is largely due to its accessibility, performance, security, ease of use and development, which are also the main reasons for selecting WordPress for this research.

The technologies that underlie WordPress are PHP and MySQL, the platform being also licensed under the GPLv2, which means that it can be used and modified by the users. For the WordPress system to work and be functional, it must be installed on a Web server. The chosen Web server can be part of an Internet hosting service or a computer running the WordPress.org software package, in order to serve as the network host itself.

The basic features of the WordPress platform include a module architecture, called plugins and a system of templates, well-known as themes. The offer is extremely wide, there are a multitude of such tools developed over time in order to serve the needs of users.

Although the WordPress platform was originally created as a blogging system, its subsequent development has also allowed other types of Web content, including Learning Management Systems (LMS), online stores, discussion forms, etc. The transition from CMS to LMS involved the emergence of numerous tools such as modules and themes to support educational processes, their organization and monitoring.

In addition to the LMS instruments available in the WordPress library, the open-source nature of the platform allows the development and implementation of additional instruments in accordance with the user needs. Subsequently, by associating with the necessary plugins and themes, previously created or simply used from the library, the user has the opportunity to achieve a unitary learning system. Thus, unlike Facebook Social Learning Groups, WordPress allows the integration of built-in facilities in the learning system, which means finding all the facilities in a whole.

The Proposed Architecture

In order to provide a better understanding of how the two distinct technologies can function together, we aim to create a functional model that constitutes the system architecture. Therefore, the efforts will be focused on the visual representation of the components that make up an online learning environment by correlating Facebook with WordPress and also on explaining the functional model.

Combining the facilities offered through Facebook Social Learning Groups with those offered by WordPress can ensure the creation of a complex Social Learning system based on the Web. However, starting such an integration process involves the existence of two key components: WordPress Plugins and Facebook Application.

In fact, the proposed architecture is dependent on WordPress plugins, these facilitating the integration with the Facebook social platform. As a result of the changes to the Facebook APIs, starting with August 1, 2018, the access to personal Facebook profiles was severely restricted for all Social Media tools. However, the

association between Facebook and WordPress is possible, to some extent, through certain modules.

Currently, establishing the connection between a WordPress plugin, regardless of the facilities offered by it, and a Facebook Group, can only be done through a Facebook Application. Hence, after installing and activating a plugin within the WordPress site, its configuration involves connecting to a Facebook Application by entering the application identifier and an access token.

In order to support the reasoning related to the structures and behaviors of the target system, Figure 1 provides an overview of how these tools come together, illustrating the related technology architecture:

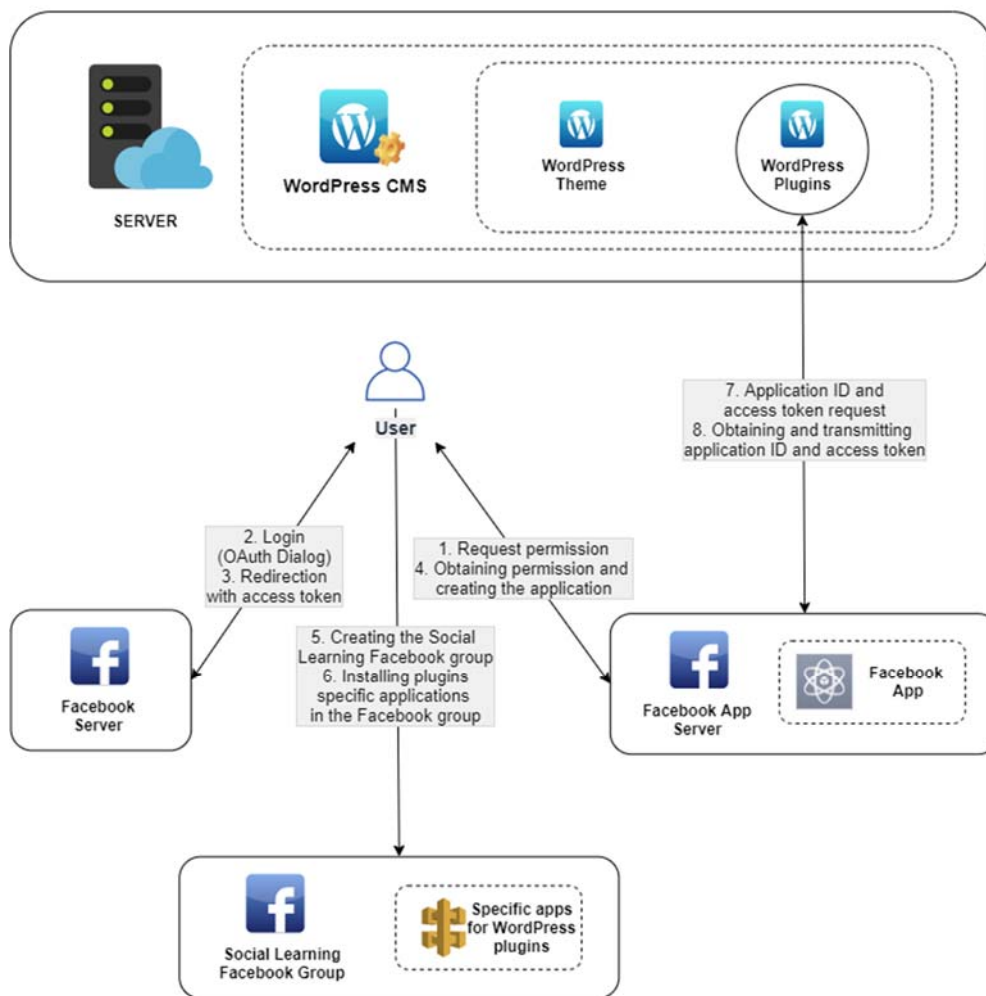


Fig. 1. The proposed architecture

Source: Authors' own projection and representation.

Another extremely important aspect refers to the Facebook Apps related to the plugins. For WordPress plugins designed with the aim to ensure the integration between WordPress and Facebook Social Learning Groups, there are specific Facebook Applications. The usage of the plugin by Facebook Social Learning Group members is allowed by installing a specific application within the group.

Architecture Validation

As previously mentioned, the targeted architecture is dependent on WordPress plugins. Thus, the validation of the proposed architecture aimed to identify and test the

possibilities of bilateral integration of the two technologies: WordPress integration within Facebook and Facebook integration within WordPress.

In order to achieve the actual association between Facebook and WordPress, two basic components owned by the authors were used, namely: a platform developed through WordPress and a Social Learning Facebook Group. Identifying the most efficient solutions to ensure the integration involved both market research and testing of several existing instruments.

The functional features of the plugins used for integration between the platforms under analysis are

often similar. Regarding this research, the reasoning behind the choice of specific plugins refers to their complexity, proper functioning and compatibility with the other tools used. Without directly referring to the instruments used, we will continue to focus on the main findings of the testing process.

A. WordPress – Facebook Integration

When we refer to the integration of an external educational platform within a social network, we assume that the network itself is the main system that supports the teaching and learning processes. Thus, the established objectives regarding the integration of WordPress in Facebook refer to:

- **A1:** identifying the main solutions ensuring the transmission of data and information within the learning system developed through WordPress to Facebook Social Learning Groups;
- **A2:** identifying the possibilities of incorporating the facilities of the learning system developed through WordPress within the Facebook Social Learning Groups.

After testing several plugins that allow WordPress integration into Facebook Social Learning Groups, it was established that this process involves, in fact, the automatic publication of posts available on the WordPress site in groups. This approach aims to transmit all educational posts to the Facebook Social Learning Group, so that students have the opportunity to participate in teaching and learning processes exclusively through the social network.

Currently, existing solutions provide facilities that ensure the optimal transmission of information from WordPress to Facebook Social Learning Groups, but there is no possibility to incorporate them into the social network, as built-in components. Although technological progress allows the development of tools to ensure this approach, Facebook policies does not allow the direct integration of external tools.

B. Facebook – WordPress Integration

As we consider two distinct platforms, between which there is no predefined correlation, it was necessary to address the opposite approach to the previous one. Although access to third-party tools to Facebook profiles is restricted, there are a few ways in which the Facebook-WordPress association can be achieved. In this regard, two objectives were set:

- **B1:** identifying the means by which data and information from Facebook Social Learning Groups can be transmitted to WordPress;
- **B2:** identifying the possibilities of incorporating the facilities offered through Facebook Social Learning Group within the learning system developed through WordPress.

The main facilities offered through the plugins aimed at integrating Facebook into WordPress refer to the registration/login permissions of users within the external platform, through a personal Facebook account and the incorporation of certain Facebook elements within WordPress. Regarding the incorporation of Facebook elements in WordPress, the testing process results showed that the possibilities are limited to the incorporation of certain posts.

However, incorporating Facebook elements into WordPress, whether in the form of a manual process or a process done through plugins, represents only a visual association. Integrating Facebook facilities in WordPress, similar to the integration of WordPress in Facebook, take place at the level of the individual platform.

Advantages and Limitations

Considering the aspects discussed above, we notice the extremely straightforward way in which the technologies components are combined and work, in order to implement the learning system as a whole. The ease in terms of development and implementation is determined by the existence on the market of components aimed to constitute a social learning system, which is the main advantage of the proposed architecture. In general, simply configuring and customizing components as needed is sufficient.

Another advantage of the proposed architecture refers to the bidirectional approach of educational processes that can be implemented by correlating WordPress with Facebook Social Learning Groups. Thus, the existence of two main hypotheses regarding the use of such a system can be considered:

- use of the educational system as a whole focused on Facebook Social Learning Groups with access to external tools according to the needs experienced;
- the predominant use of the external learning system developed through WordPress, the Facebook Social Learning Groups strictly serving as a means of disseminating information within the platform.

Regarding the extension of learning opportunities present in the Facebook Social Learning Groups, WordPress plugins have the capacity to cover a large part of the current development needs in accordance with the evolution of the ICT field. At the same time, in case of lack of desired options, WordPress facilitates their development.

The difficulty may arise due to the absence of a direct association between Facebook and WordPress. Basically, the use of modules offered by WordPress partners does not guarantee their permanent optimal operation, given the frequent changes encountered in Facebook policies. In order to reduce these risks, it is recommended to use modules provided by trusted developers to ensure continuous updating and support or to develop such plugins.

In fact, regarding to the discussed architecture, the major constraints are not directly related to the facilities made available to users or to the possibility of developing additional tools, but to the integration between the social network and the open-source platform. Even if by 2018 the possibilities for integration between the two platforms were constantly growing, as a result of the well-known Facebook – Cambridge Analytica scandal, the imposed restrictions increased dramatically.

Consequently, there is a possibility that the development of educational processes may be difficult. The expected adversity regarding the teaching and learning processes is determined by the need to carry out activities related to a certain educational activities on two distinct "fronts". The dissemination of the facilities offered entails a dilution of the educational process as a whole, as the unitary character, generally due in particular to the symmetry of the structure of an e-Learning system, cannot be ensured.

On the other hand, a learning management system developed through WordPress and used individually, without ensuring integration with the targeted social network, loses its potential. Although such an education system may be associated with plugins and tools that give it a high degree of complexity and efficiency, they would not differentiate it from other software products on the market at present.

Moreover, a particular aspect of the proposed architecture refers to the private nature of Facebook Social Learning Groups for which solutions have been sought for integration with WordPress. Such a setting is extremely important when it comes to conducting educational processes in order to ensure the confidentiality of members and posts within the group. Accordingly, it is obvious that access to this type of group will be restricted to any third party, without strictly referring to social network users, but recalling external software tools.

Conclusions. The present research attempts to propose an architecture whose implementation aims to ensure the association between Facebook and WordPress for educational purposes, supporting Social Learning. The obtained results highlight the ease of combining the components and subcomponents that underlie the architecture and constitute the Social Learning system as a whole.

However, the lack of formal agreements between the two platforms under analysis represents a major obstacle to the development of tools aimed to ensure the association between them. Although technological progress can ensure the implementation of plugins that offer possibilities in this regard, they would violate existing policies at the level of Facebook and WordPress.

At the moment, Facebook offers association possibilities with WordPress based on strict approvals, but they are currently quite limited, targeting only basic elements such as posting. On the other hand, retrieving data from Facebook, applications cannot access members' personal information, posts or comments.

Nevertheless, we can state that the proposed architecture could lay the foundations for the development of extremely powerful e-Learning systems through Social Media by associating with the WordPress platform. We argue our assumption referring to the possibility of developing additional tools through WordPress, which supports a continuous process of improvement and expansion of learning facilities in accordance with the ever-changing needs of users.

References

1. Statista, 2020. Number of social network users worldwide from 2017 to 2025 (in billions). [Online] Available at: <https://www.statista.com/statistics/278414/number-of-worldwide-social-network-users/>

I. A. Богослов, асп., асист.
ORCID ID: 0000-0001-5834-8710
Сібі́йський університет "Лучан Блага", Сібіу, Румунія,
М. Р. Джорджеску, д-р филос., проф.
ORCID ID: 0000-0002-7022-3715
Ясський університет імені А. І. Кузи, Румунія,
А. Г. Пітік, д-р филос., доц.
ORCID ID: 0000-0003-0104-5430
Сібі́йський університет "Лучан Блага", Сібіу, Румунія

ЗВ'ЯЗОК FACEBOOK З WORDPRESS ДЛЯ НАВЧАЛЬНОГО ПРИЗНАЧЕННЯ: ПРОПОНОВАНА АРХІТЕКТУРА ПІДТРИМУЄ СОЦІАЛЬНЕ НАВЧАННЯ

Забезпечення соціальних освітніх процесів не тільки являє собою тенденцію еволюції систем електронного навчання, але й становить інтерес для розробників певних соціальних платформ. Фактично зростання усвідомлення важливості використання інструментів соціальних мереж у освіті веде до двостороннього підходу: інтеграції соціальних інструментів у системи електронного навчання й інтеграції засобів навчання у платформи соціальних мереж.

Згодом соціальна мережа Facebook стала активно використовуватися на глобальному рівні, зокрема в процесах електронного навчання. Щоб задовольнити поточні потреби у викладанні й навчанні, Facebook надає користувачам вбудовані можливості для полегшення процесів соціального навчання. Однак розширення функцій соціального навчання, інтегрованих у Facebook, зараз може бути проблемою через політику, установлену для соціальної мережі.

У статті описано пропонувану архітектуру для розширення можливостей соціального навчання, пропонуваного в групах Facebook, шляхом забезпечення кореляції із системою з відкритим вихідним кодом WordPress. Буде обговорено питання, що стосується того, як можна забезпечити кореляцію між двома платформами, необхідні інструменти й етапи реалізації. Також висвітлено основні результати та переваги, які забезпечує ця архітектура, розглянуто виявлені недоліки.

Ключові слова: освітні технології, соціальне навчання, соціальні мережі, Facebook, WordPress, CMS з відкритим вихідним кодом.

2. Siemens, G., 2005. Connectivism: A learning theory for the digital age. *International Journal of Instructional Technology & Distance Learning*, pp. 3-10.

3. Downes, S., 2010. New technology supporting informal learning. *Journal of Emerging Technologies in Web Intelligence*, 2(1), pp. 27-33. DOI: <https://doi.org/10.4304/jetwi.2.1.27-33>.

4. Statista, 2020. Most popular social networks worldwide as of July 2020, ranked by number of active users (in millions). [Online] Available at: <https://www.statista.com/statistics/272014/global-social-networks-ranked-by-number-of-users/>

5. Rojas-Kramer, C., Esquivel-Gómez, I. & García-Santillán, A., 2015. EDUCATIONAL USE OF FACEBOOK IN HIGHER-EDUCATION ENVIRONMENTS: CURRENT PRACTICES AND GUIDELINES. Madrid, Spain, s.n., pp. 6042-5052.

6. Meishar-Tal, H., Kurtz, G. & Pieterse, E., 2012. Facebook Groups as LMS: A Case Study. *International Review of Research in Open and Distance Learning*, pp. 33-48. DOI: <https://doi.org/10.19173/irrodl.v13i4.1294>.

7. Akbari, E., Pilot, A. & Simons, P.-J., 2015. Autonomy, competence, and relatedness in foreign language learning through Facebook. *Computers in Human Behavior*, pp. 126-134. DOI: <https://doi.org/10.1016/j.chb.2015.01.036>.

8. Aaen, J. & Dalsgaard, C., 2016. Student Facebook groups as a third space: between social life and schoolwork. *Learning, Media and Technology*, pp. 160-186. DOI: <https://doi.org/10.1080/17439884.2015.1111241>.

9. Davidovitch, N. & Belichenko, M., 2018. Facebook Tools and Digital Learning Achievements in Higher Education. *Journal of Education and e-Learning Research*, pp. 8-14. DOI: <http://dx.doi.org/10.5772/intechopen.77189>.

10. Thai, M., Sheeran, N. & Cummings, D. J., 2019. We're all in this together: The impact of Facebook groups on social connectedness and other outcomes in higher education. *The Internet and Higher Education*, pp. 44-49. DOI: <https://doi.org/10.1016/j.iheduc.2018.10.001>.

11. Coates, H., James, R. & Baldwin, G., 2005. A critical examination of the effects of learning management systems on university teaching and learning. *Tertiary Education and Management*, Volume 11, pp. 19-36. DOI: <https://doi.org/10.1007/s11233-004-3567-9>.

12. Facebook Help Center, 2019. What is a social learning group on Facebook and how does it work?, s.l.: s.n.

13. WordPress, 2020. About. [Online] Available at: <https://wordpress.org/about/>

Received: 09/06/2020

1st Revision: 29/08/2020

Accepted: 07/10/2020

Author's declaration on the sources of funding of research presented in the scientific article or of the preparation of the scientific article: budget of university's scientific project

I. А. Богослов, асп., асист.
ORCID ID: 0000-0001-5834-8710
Сибірський університет "Лучан Блага", Сибіу, Румунія,
М. Р. Джорджеску, д-р филос., проф.
ORCID ID: 0000-0002-7022-3715
Ясський університет імени А. І. Кузы, Румунія,
А. Г. Питик, д-р филос., доц.
ORCID ID: 0000-0003-0104-5430
Сибірський університет "Лучан Блага", Сибіу, Румунія

СВЯЗЬ FACEBOOK С WORDPRESS ДЛЯ УЧЕБНОГО НАЗНАЧЕНИЯ: ПРЕДЛАГАЕМАЯ АРХИТЕКТУРА ПОДДЕРЖИВАЕТ СОЦИАЛЬНОЕ ОБУЧЕНИЕ

Обеспечение социальных образовательных процессов не только представляет собой тенденцию с точки зрения эволюции систем электронного обучения, но и представляет интерес для разработчиков определенных социальных платформ. Фактически рост осознания важности использования инструментов социальных сетей в образовании ведет к двустороннему подходу: интеграции социальных инструментов в системы электронного обучения и интеграции средств обучения в платформы социальных сетей.

Со временем социальная сеть Facebook стала активно использоваться на глобальном уровне, в том числе в процессах электронного обучения. Чтобы удовлетворить текущие потребности в преподавании и обучении, Facebook предоставил пользователям встроенные возможности для облегчения процессов социального обучения. Однако расширение функций социального обучения, интегрированных в Facebook, в настоящее время может быть проблемой из-за политики, установленной для социальной сети.

В статье описывается предлагаемая архитектура для расширения возможностей социального обучения, предлагаемого в группах Facebook, путем обеспечения корреляции с системой с открытым исходным кодом WordPress. Обсуждены вопросы, касающиеся того, как можно обеспечить корреляцию между двумя платформами, необходимые инструменты и этапы реализации. Также освещены основные результаты и преимущества, которые обеспечивает эта архитектура, рассмотрены выявленные недостатки.

Ключевые слова: образовательные технологии, социальное обучение, социальные сети, Facebook, WordPress, CMS с открытым исходным кодом.

Bulletin of Taras Shevchenko National University of Kyiv. Economics, 2020; 5(212): 11-18

УДК 336.1: 336.13: 336.132.11

JEL classification: H7; H72

DOI: <https://doi.org/10.17721/1728-2667.2020/212-5/2>

М. Кнір, канд. екон. наук, доц.

ORCID ID: 0000-0001-5591-2814,

В. Делас, канд. екон. наук, доц.

ORCID ID: 0000-0002-9570-1875

Київський національний університет імені Тараса Шевченка, Київ, Україна,

Н. Будник, експерт

ORCID ID: 0000-0001-6139-5622

Українська лабораторія якості і безпеки продукції АПК, Київ, Україна

БЮДЖЕТНА ДЕЦЕНТРАЛІЗАЦІЯ ТА ЇЇ ВПЛИВ НА СОЦІАЛЬНО-ЕКОНОМІЧНИЙ РОЗВИТОК РЕГІОНІВ УКРАЇНИ

Узагальнено основні результати першого етапу децентралізації в Україні в період з 2014-го до 2018-го року включно. Висвітлено основні здобутки та недоліки реформи на основі аналізу дохідної та видаткової частин місцевих бюджетів. Виявлено, що відповідно до фактичних показників мета щодо забезпечення фінансової автономії місцевого самоврядування може вважатись досягнутою, причому зміцнення фінансової автономії та відповідні процеси позитивно вплинули на збільшення платоспроможності бюджетів регіонів. Обґрунтовано доцільність продовження реформи та створення стратегії розвитку для об'єднаних територіальних громад (ОТГ), що надалі, імовірно, підвищать потенціал другого етапу реформи.

Ключові слова: бюджетна децентралізація; об'єднані територіальні громади; органи місцевого самоврядування; міжбюджетні трансферти; податки; реформа; місцевий бюджет.

Постановка проблеми в загальному вигляді. Важливою ознакою демократичної держави є забезпечення зростання рівня добробуту для кожного громадянина, а однією з головних умов її розвитку – забезпечення правової, фінансової та організаційної автономії системи органів місцевого самоврядування (ОМС).

Питання децентралізації завжди були актуальними в науці та практиці. Реформа децентралізації розпочалася в 2014 р. і передбачає перерозподіл функцій та повноважень між центральними органами влади та місцевими органами влади, при цьому відбувається зміна адміністративно-територіального устрою, місцевого самоврядування та державної регіональної політики. Децентралізація має вагомий вплив на економічний розвиток країн, що є особливо нагальним для України. Оскільки реформа є актуальною, але не всі питання чітко регламентовані, ця тема потребує подальшого дослідження.

Аналіз останніх досліджень і публікацій. Питання управління процесами децентралізації детально досліджено в багатьох працях визначних у світі науковців. Засновником теорії фінансової децентралізації є американський економіст Чарльз Тібу, який розглядав

локальні органи як структури, що пропонують різні товари (послуги) за різними цінами (податки) [23; 24]. Англійський учений У. Оутс у своїх працях, присвячених фіскальній децентралізації стверджував, що якщо в територіальному утворенні є можливість забезпечити суспільне благо і його гранична вартість дорівнює середній вартості його виробництва, то надання повноважень місцевим урядам у відповідному обсягу завжди будуть ефективнішим, ніж надання цих повноважень центральному уряду [21]. З правового боку питання децентралізації досліджував Дж. Ведель, який наполягав, що децентралізація полягає у передачі повноважень державним службовцям та органам, які не є ієрархічно підпорядкованими центральній владі та обираються населенням [3].

Більш сучасні зарубіжні погляди на питання фінансової децентралізації описані в працях Ж. Вернера, А. Шаха, Б. Долері й інших учених. В них пояснюються потенційні вигоди від децентралізації, порядок надання окремих суспільних благ та даються визначення основним економічним функціям уряду в процесі реалізації децентралізації [20; 22; 25].