



UDC 332.122

FORMATION OF A SOCIO-ECONOMIC STRATEGY FOR THE DEVELOPMENT OF A TOURIST DESTINATION: THEORETICAL ASPECT**Konieczny Grzegorz***Doctor of Social Science, Professor,**ORCID ID: <https://orcid.org/0000-0002-6337-9738>**Rector of WSHIU Academy of Applied Sciences,**WSHIU Academy of Applied Sciences, Poznan, 28 June 1956, nr 217/219, 61-485***Kolisnichenko Paulina***Candidate of Economic Sciences, Associate Professor,**ORCID ID: <https://orcid.org/0000-0001-6730-1236>**Vice Rector for International Cooperation,**WSHIU Academy of Applied Sciences, Poznan, 28 June 1956, nr 217/219, 61-485***Homon Nataliia***Master's degree,**ORCID ID: <https://orcid.org/0000-0001-9359-073X>**Junior Researcher of the Department of Ukrainian and Foreign Languages,**National University of Ukraine on Physical Education and Sport,**Kyiv, Fizkultury St., 1, 03150*

Abstract. *The article studies theoretical aspects of formation of the socio-economic strategy of development of a tourist destination. It is noted that the modern development of the economy is influenced by unfavourable challenges of the external environment. In such a situation, the prerequisite for regional development is the elaboration and application of effective instruments of state regulatory policy. It is indicated that one of the important functions of the state authorities is the formation of a socio-economic strategy for the development of the region as a basis for maximising the territorial competitive advantages of regional business and improving the quality of life of the population. It has been determined that strategic planning for the development of a tourist destination can be ensured by means of an organisational and economic mechanism, which includes interrelated functional blocks of elements of strategy development, as well as methodological tools aimed at achieving a balance of interests of the State and the population. The article proposes a mechanism for strategic planning of development of a tourist destination, which is based on the formation of a strategy for socio-economic development, in the interests of qualitative growth of the regional economy and social sphere, under conditions of differentiation of economic needs and competitiveness potential of regions. It is summarised that while developing strategies and strategic plans for the socio-economic development of a tourist destination, it is necessary to take one innovative concept of socio-economic development as a theoretical basis. The choice of the concept should be made depending on the specifics of the development conditions of the territory, the resources available there and the objectives to be solved, the target settings of state and local authorities, etc.*

Keywords: *economy, strategy, development, region, social sphere.*

Introduction. Modern economic development is influenced by unfavourable external challenges. In this situation, the development and implementation of effective instruments of state regulatory policy is a prerequisite for regional development. One of the important functions of public authorities is the formation of a socio-economic strategy for the development of a tourist destination as a basis for maximising the territorial competitive advantages of regional businesses and improving the quality of life of the population. The development and practical implementation of effective mechanisms for strategic planning and balanced



regulation of the regional economy is an urgent problem, the solution of which largely depends on the relations between business, government and the population in the context of differentiated economic interests and competitiveness potential of the region. The quality of the socio-economic development strategy is achieved through advanced forecasting technologies, analysis of the internal and external environment, formation of the development scenarios, elaboration of effective public-private partnership instruments, monitoring and implementation of the plans. The necessity of effective interference of various instruments of the State regulatory influence within the framework of a systematic approach to planning the socio-economic development of a tourist destination as a factor of ensuring sustainable economic growth of the national economy has determined the relevance of the chosen research topic.

Problem statement. In modern regional management, there is a deficit in scientific support for the concepts of development of targeted planning of the regional economy. Insufficiently developed technologies for the formation of socio-economic development scenarios, as well as public-private partnership tools, require further theoretical and methodological elaboration of applied issues related to the development and application in strategic planning practice of the mechanism for forming a strategy for socio-economic development of a tourist destination. The issues of forming a mechanism for developing strategies and planning the development of territories are discussed in the following works: Ansoff I. [10], Brundland G. [11], Cleland D. [9], Hayek F. [14], King W. [9], Kozhukhivska R. [2], Parubok N. [2], Petrenko N. [2], Podzihun S. [2], Udovenko I. [2]; the issues of effective use of methodological tools within the framework of the organisational and economic mechanism of forming a regional development strategy are studied in the works of Ahlstrand B. [6], Lampel J. [6], Mintzberg G. [6], Pidtserkovna Kh. [8], Shershniova Z. [13], Wilson I. [7] and others. At the same time, the theoretical and methodological issues of developing mechanisms for the formation of strategies for socio-economic development of regions in the context of economic globalisation and the imperatives of innovative development are not sufficiently covered.

The purpose of the article is to develop an organisational and economic mechanism for forming a strategy for the socio-economic development of a tourist destination in the interests of qualitative growth of the regional economy and social sphere in the context of differentiation of economic interests and competitiveness potentials of regions. The implementation of this objective has necessitated the formulation and resolution of issues of critical review of theoretical approaches to the formation of territorial development strategies.

Data and methods. In order to achieve this goal, the article uses the method of systematisation of concepts, which can serve as a theoretical basis for the development and successful implementation of state mechanisms for strategic planning of socio-economic development of territories, in particular, tourist destinations.

Results and Discussion. Further development of the economy, the necessity to increase the competitiveness of territories, and the solution of the most important environmental and social problems require that public authorities pay increased



attention to the formation of effective mechanisms for strategic territorial planning (STP). The formation of state mechanisms for STP is impossible without the use of modern theories of territorial development, concepts and schools of modern strategic planning. In the course of generalising various concepts and theories of public administration, we have identified the following as the main ones that can be used in strategic planning of territories (Fig. 1):

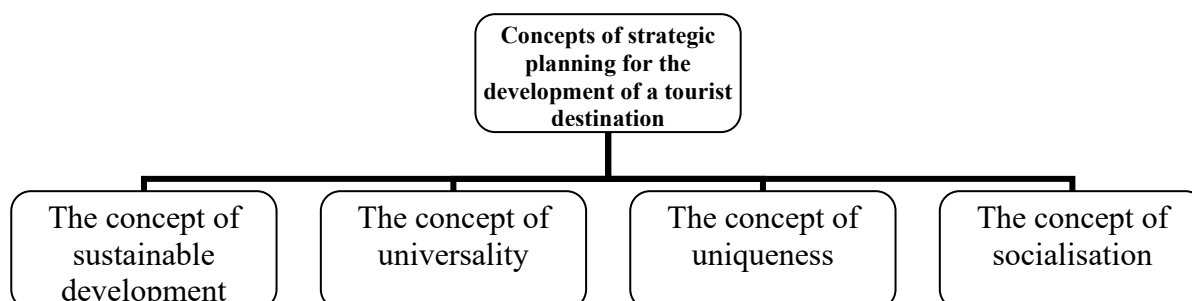


Figure 1 – Key principles of strategic planning for the development of a tourist destination*

**Source: compiled by the author on the basis of the conducted research.*

Below, consider in more detail Key principles of strategic planning for the development of a tourist destination:

1. *The concept of sustainable development* which is based on the need to build and manage territories at the regional and local levels, primarily from the standpoint of environmental protection and care for future generations. The concept of sustainable development emerged under the influence of growing attention to environmental issues. According to the definition of the United Nations, sustainable development is the development of a society that meets the needs of the present without compromising the opportunities that future generations will inherit in order to fulfill their own needs [1]. It should be specified that sustainable development of territories means their socially, economically and environmentally balanced development aimed at creating economic potential, a full-fledged living environment for present and future generations based on the rational use of resources (natural, labour, production, scientific, technical, intellectual), technological re-equipment and restructuring of enterprises, improvement of social, production, transport, communicational and informational, engineering and environmental infrastructure, improvement of living conditions, recreation and health improvement, preservation and enrichment of biological diversity and cultural heritage [2, p. 303].

The particular importance of this concept for planning the development of human settlements was emphasised at the European Conference on Sustainable Development of Cities and Towns in Aalborg in 1994 [3], where the Charter for Sustainable Development of European Cities (Aalborg Charter) was adopted and signed by representatives of more than 120 cities. At the same time, the idea of a «garden city» became widespread, which involved the construction of independent satellite cities around large cities with certain employment opportunities. Their layout was supposed to ensure a healthy and safe living environment. For this purpose, satellite cities were surrounded by green belts and buffer zones. The garden city concept has been implemented in many countries in Western and Eastern Europe.



The Concept of Sustainable Development of Human Settlements defines the main directions of state policy to ensure sustainable development of human settlements, as well as legal and economic ways of their implementation. The enactment of the Concept corresponds to the principles proclaimed in Agenda for the 21st Century, the final documents of the United Nations Conference on Human Settlements (Habitat II), held in 1996 in Istanbul (Turkey), and the recommendations of the United Nations Economic Commission of Europe [4]. According to the theoretical framework of the European Commission, there should be seven elements in the management of integrated sustainable development of territories at the regional level, which are necessary to transform settlements into a comfortable place of residence and vital activity (Fig. 2): principle is the most important aspect of sustainable development and environmental management; politics – the nature of political participation and engagement required to support the territories; cooperation – management models and agreements for sharing responsibilities with different stakeholders; process – agreeing on concepts and goals to manage and monitor the implementation of actions; sociologization – meeting the needs of the population, respecting local traditions, and complying with national and European regulations; plan – integration of territorial and thematic planning; programme – actions to achieve the agreed goals [3].

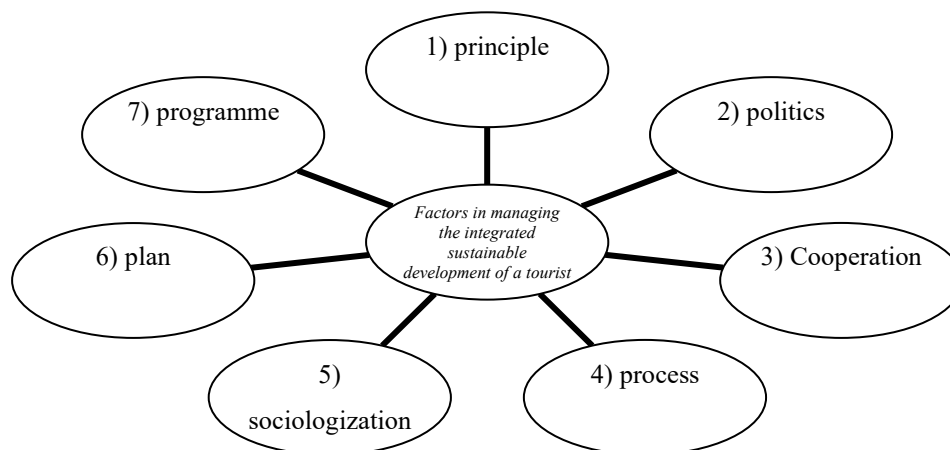


Figure 2 – Components of managing integrated sustainable development of a tourist destination*

**Source: compiled by the author based on data from [3].*

The Basic Principles for Sustainable Spatial Development of the European Continent contain measures to strengthen economic potential and achieve sustainable development in cities and towns. They include: development of strategies adapted to the local context and focused on managing the effects of economic restructuring; management of the expansion of human settlements, limiting trends of suburbanisation by developing more compact forms of development in small and medium-sized cities, promoting the use of cost-effective construction methods, developing construction near transport routes, supporting internal policies of urban areas to improve the quality of life, including the preservation of existing ecosystems and the creation of new green areas; regeneration of neighbourhoods and implementation of joint actions of social groups within urban structures, especially in



large centres where there are exceptions in the field of social development; targeted management of urban ecosystems, especially in terms of open and green spaces, water, energy and waste; development of efficient and at the same time environmentally friendly public transport, which should contribute to sustainable transportation; creation of planning authorities within the local government of individual cities and communities to coordinate and implement relevant measures; preservation and enhancement of cultural heritage; development of urban networks [4].

The European Sustainable Development Policy pays particular attention to the potential of urban areas and the conditions in which they develop. It aims to implement four interconnected pillars, the objectives of which are: strengthening of economic prosperity and the labour market, increasing of employment in localities; promoting equality, social integration and neighbourhood reconstruction; protection and enhancement of the economic environment, as well as management of energy resources and transport to achieve local and global sustainability; implementation of strategic integrated plans for planning and development of territories [3].

It should be noted that the European Union's territorial programme regulates cooperation in addressing issues related to territorial problems that may arise in the future, including long-term economic development, labour market policy, creation of links between regions and development of adjacent territories, the resolution of which requires the participation of regional representatives.

The Leipzig Charter for Sustainable European Cities [5], adopted in 2007, is based on the premise that an integrated approach to urban planning is a prerequisite for the long-term development of European cities. According to this document, the policy of integrated urban development is a process that coordinates the spatial and temporal aspects of the main areas of urban development. The policy of integrated development of human settlements is implemented through the so-called integrated local planning and development plans. They provide spatial, temporal and actual coordination and integration of various policies, planning resources to achieve the set goals using specific tools. These plans are developed by local administrations with the participation of interested representatives of the general public, with the direct participation, as well as with the involvement of economic entities, civil society structures, specific community groups and the population as a whole [6, p. 79].

2. The theoretical basis for the creation of state mechanisms for strategic planning of socio-economic development of territories is also the *concepts of «universality»*. The concept of «universality» is based on the idea of the evolutionary unity of the world, according to which regions (settlements) go through the same stages of development in a common path, but at different times. It is concluded that it is important to study and adequately use the experience of settlements (cities) - leaders in accordance with the new external conditions. The use of the concept of «universality» allows comparing the levels of development of territories, ranking them, and makes it possible to use the existing experience of socio-economic development.

3. *The concept of «uniqueness»* can be characterized as a constant search by regional and local authorities and local self-government for directions of



development, whereby the peculiarities of cultural and socio-economic development of territories, the environmental condition of settlements, etc. are taken into account to the maximum extent possible. Modern regions and settlements in the course of strategic planning of territories are increasingly trying to combine elements of these two concepts, combining their application either in different sectors of the urban economy and social sphere or in strategic development directions. For example, the task of economic growth is approached from the standpoint of universality, and the search for a city brand is approached from the standpoint of uniqueness [7, p. 104].

4. *The concept of improving the conditions of socialization.* Developed countries use many management models for the development and functioning of territories, but they are united by one goal: to ensure that their residents receive quality services, maintain high standards of living conditions and create modern local infrastructure. All existing concepts for the development of settlements (primarily related to urban development, but in our opinion, they can be used for any territory) can be

summarised into the following groups: a) the concept of an «entrepreneurial city» became widespread in the early 1990s in a number of European countries (Germany, France, Italy, Spain, Belgium). An «entrepreneurial city» uses public financial and other resources, investing them in the commercial sphere, including sometimes beyond its own borders [8]; b) the concept of a 'janitor city', which sees its functions primarily in meeting public needs, spends its budgetary and other resources on creating a favourable, optimal environment for people's life and business activities. This is a fundamentally different view of the use of public resources [9, p. 113].

Among the modern theories, in our opinion, the most favourable for strategic planning of a tourist destination is the integrated theory of local economic development. The main provisions of the integrated theory of local economic development are as follows: the main focus is shifted from demand (enterprise) to supply (labour force, natural resources); local institutions play a significant role in identifying the problems of the regional economy and developing new links within the institutional structure itself [10, p. 52]; location-based benefits are primarily related to the state of the physical and social environment, rather than the geographical one; the territories themselves should look for ways to maximise the involvement of intellectual resource centres and local businesses in economic development [11, p. 88].

In our opinion, the modern concept of strategic planning of territories at the local level should be combined, taking into account all the above concepts. The provisions of different schools of strategic planning can be used in the process of strategic planning of territories. Based on the analysis of sources [12; 13; 14], three main scientific schools of strategic territorial planning can be distinguished: the traditional (conservative) school is based on analysing past processes, identifying trends and translating (interpolating) them into the future, i.e., on a forecast based on the past and present («looking to the future»); the futuristic school is based on a vision of the desired future («a view from the future»); «mixed school» – contains elements of conservative and futuristic schools, and, in our opinion, is more practical for use.



Conclusions. Therefore, while developing strategies and strategic plans for the socio-economic development of a tourist destination, it is necessary to take one of the concepts of socio-economic development as a theoretical basis. The choice of one of the scientific schools as a theoretical basis for strategic planning of territories should be made depending on the specifics of the conditions of development of territories, resources available there and tasks being solved; target settings of state authorities and local self-government authorities. **The author's proposal** is that the development of an effective strategy for the socio-economic development of a tourist destination can be ensured by means of an organisational and economic mechanism that includes interrelated functional blocks of the elements of strategy development. At the same time, the theoretical mechanisms of strategic planning for the development of a tourist destination should be based on the use of methodological tools aimed at achieving a balance of interests of the state, business, and population, creating the preconditions for sustainable economic growth of the region and improving the quality of life of the population in the context of differentiation of interests and competitiveness potentials of the regions.

References:

1. Regional Review Meetings. 2023. United Nations Organization. *Official website*. URL: <https://www.un.org/en/landlocked/documents> (accessed January 03, 2024)
2. Kozhukhivska R., Parubok N., Petrenko N., Podzihun S. and Udovenko I. (2017). Methods of assessment of efficiency of creating regional innovative clusters for dynamic development of economics. *Investment Management and Financial Innovations*, 14(3), 302-312. doi:10.21511/imfi.14(3-2).2017.01
3. The Aalborg Charter, 1994. Sustainable Cities Platform. URL: <https://sustainablecities.eu/the-aalborg-charter/> (accessed January 03, 2024)
4. Sustainable cities and human settlements. United Nations. URL: <https://sustainabledevelopment.un.org/topics/sustainablecities> (accessed January 03, 2024)
5. Leipzig Charter for a Sustainable European City. *Rfsustainablecities – Powered by Customify*. 2023. URL: http://www.rfsustainablecities.eu/IMG/pdf/leipzig_charta_ru_2cle65c185.pdf
6. Mintzberg G., Ahlstrand B., Lampel J. *Strategy Safari: A Guided Tour Through The Wilds of Strategic Management*. London: Free Press. 2005. 416 p.
7. Wilson I. Strategic planning for the millennium: Resolving the dilemma. *Long rouge planning*. 2017. Vol. 31, № 4. pp. 507-513.
8. Pidtserkovna Kh. The concept of «Garden City» in the format of urbanized space. 7th International Scientific and Practical Conference «Science in the Information Space-2011» (29-30.09.2011). URL: <https://confcontact.com/node/190>.
9. King W., Cleland D. *Strategic planning and policy*. New York: Van Nostrand Reinhold, 1978. 374 p.
10. Ansoff I. *Strategic management*. London: Palgrave Macmillan. 251 p.
11. Brundland G. *Our common future: International Commission on Environment and Development*. Oxford: Oxford University Press, 2015. 283 p.



12 Territorial development in Ukraine: agglomerations and sub-regions development. 2012. USAID LINC. Kyiv. URL: <https://docplayer.net/59009691-Territorialniy-rozvitok-v-ukrayini-rozvitok-aglomeraciy-ta-subregioniv.html>

(accessed January 03, 2024)

13. Shershniova Z. Strategic management. 3rd ed. Kyiv: KNEU, 2014. 700 c.

14. Hayek F.V. Die Vermertung des Wissens in der Geseleschaft. Individualismus und Wirtschaftliche Ordnung. Auft: Salzburg, 1976. pp. 103-110.

Анотація. Наразі, розвиток економіки країни залежить від багатьох факторів зовнішнього та внутрішнього середовища. Тому, необхідною умовою регіонального розвитку має бути удосконалення, розробка й використання інноваційних форм державної регулятивної політики. Зважаючи на вказану проблематику постає необхідність у вивченні ефективної інтерференції різних інструментів державного регулятивного впливу, яким можна застосовувати в рамках системного підходу до планування соціально-економічного розвитку території. Указаний аспект підтверджує актуальність обраної тематики статті та засвідчує необхідність проведення більш глибоких емпіричних досліджень у даному напрямку. У статті проведено дослідження теоретичних аспектів формування соціально-економічної стратегії розвитку регіону. Зазначено, що сучасний розвиток економіки відбувається під впливом несприятливих викликів зовнішнього середовища. У цій ситуації необхідною умовою регіонального розвитку виступає розробка і застосування ефективних інструментів державної регулятивної політики. Указано, що однією з важливих функцій державної влади є формування соціально-економічної стратегії розвитку регіону як основи максимізації територіальних конкурентних переваг регіонального бізнесу і підвищення якості життя населення. Встановлено, що стратегічне планування розвитку територій можливо забезпечити за допомогою організаційно-економічного механізму, що включає взаємопов'язані між собою функціональні блоки елементів розробки стратегії, а також методичний інструментарій, який орієнтований на досягнення балансу інтересів держави і населення. Запропоновано механізм стратегічного планування розвитку територій, який ґрунтується на формуванні стратегії соціально-економічного розвитку, в інтересах якісного зростання регіональної економіки та соціальної сфери, за умов диференціації економічних потреб і потенціалу конкурентоспроможності регіонів. Резюмовано, що розробляючи стратегії і стратегічні плани соціально-економічного розвитку територій, необхідно в якості теоретичної основи брати за основу одну інноваційні концепції соціально-економічного розвитку. Вибір концепції повинен здійснюватися в залежності від специфіки умов розвитку територій, наявних на ній ресурсів і вирішуваних завдань, цільових установок органів державної влади та місцевого самоврядування тощо.

Ключові слова: економіка, стратегія, розвиток, регіон, соціальна сфера.

Article sent: 2024/01/03

©Konieczny G., Kolisnichenko P., Homon N.