

# PRODUCTIVE FORCES DEVELOPMENT AND REGIONAL ECONOMY

УДК 338. 486 : 351 (438)  
JEL R13, L83

DOI 10.26906/eip.2018.4(71).1350

## METHODICAL ASPECTS OF THE PROCESS OF FORMING THE DEVELOPMENT STRATEGY OF TOURISM DEVELOPMENT OF THE UNITED TERRITORIAL SOCIETIES: INFORMATION ASPECT

**Iryna Chernysh, DSc (Economics)\***

**Alla Hliebova , PhD (Economic Sciences)\*\***

**Poltava National Technical Yuri Kondratyuk University**

**Liliia Fedorchenko**

**Deputy Head of the Department of Tourism Development and Museum Business of the  
Department of Tourism Development, Museum Business and Protection of Cultural Heritage  
of the Department of Culture and Tourism of the Poltava Regional State Administration**

ORCID\* [orcid.org/0000-0001-6565-5292](http://orcid.org/0000-0001-6565-5292)

ORCID\*\* [orcid.org/0000-0002-7030-948X](http://orcid.org/0000-0002-7030-948X)

© Chernysh I., 2018.

© Hliebova A., 2018.

© Fedorchenko L., 2018.

*Стаття отримана редакцією 26.10.2018 р.*

**Introduction.** Since the beginning of the 90s, the European model of relations between state authorities and local self-government has been gradually built in Ukraine. On the way of decentralization and reforming of local self-government in Ukraine the key guideline is the European Charter of Local Self-Government (hereinafter referred to as the Charter), which the state unconditionally ratified on July 15, 1997 [4, p.17].

As a result, 665 united territorial communities (UTC) were already created (in the 51 UTC – elections of 12/24/2017), which united 3118 communities (27.8% of the total number of local councils as of 01/01/2015) and 5,700,000 people (13.4 % of the total population of Ukraine). In the process of decentralization, communities received resources, finances, powers – significant tools and opportunities to ensure full local development.

The main strategic goal of the reform is to create a comfortable and safe environment for human life in Ukraine. This can be achieved by building an effective system of government at all levels (community – region – region), transferring the maximum possible number of powers to the level closest to the citizen – communities. And also – the creation of conditions for the dynamic development of regions and the provision of high-quality and affordable public services to citizens [12]. Thus the community in addition to resources receives authority and a number of challenges. This necessitates the use of strategic approaches to management and the formation of strategies, has found support at the state level. In regulatory and legal documents: the Law of Ukraine "On the promotion of regional development" [5], the Law of Ukraine "On Planning and Development of Territories" [6] Ministries of Regional Development, Construction and Housing and Communal Services of Ukraine "Methods of developing, monitoring and evaluating the effectiveness of the implementation of regional development strategies and action plans for their implementation" [8] Resolution of the Cabinet of Ministers of Ukraine on " rhenium self-concept to improve the system of forecast and program documents on socio-economic development of Ukraine "[9], and so on. Today, cities, districts, regions, sectors, enterprises have development strategies that are used solely as a document. Only a formal approach dominates. While most European countries are currently showing

economic growth due to the strengthening of communities, synergistic effect from the accumulation of resources and the interaction between government, society and business. This is achieved through the systematic implementation of strategic management.

Having significant tourist and recreational resources, as world experience shows, it is the united territorial communities that get the chance to create new jobs, solve a number of pressing infrastructure problems, increase investment attractiveness and improve the quality of life of the population living in this territory.

**Analysis of recent researches and publications.** Methodological aspects of strategic management are reflected in scientific works: M. Armstrong, I. Ansoff, G. Minzberg, A. Strickland, Z. Shershnova, L. Fedulova, V. Nemtsov. The theoretical foundations of the development of strategies for the development of territories are described in the works by M. Datsyshyn, S. Maksymenko, A. Cherevko, V. Parkhomenko, B. Shchukin, and others. Nevertheless, the issues of strategic regional management are not resolved, since Ukrainian practice lacks the practice of managing united territorial communities and communities in the context of decentralization.

**The aim of the research.** The aim of the article is to study the methodological and practical aspects of the process of forming a tourism strategy at the level of united territorial communities.

**The main material.** Poltava region was, is and will be the edge of tourism in all its manifestations. It has long and good tourist traditions, well-known and qualified tourist leaders, and most importantly, remarkable historical, ethnographic, economic and geographical prerequisites, prospects for the development of this specific sector of the economy and an integral part of every normal human activity. The magical, rich nature, unique monuments of history and culture, the traditional hospitality of people against the background of universally recognized national and confessional tolerance are called to this corner of Ukraine. This is a strange land where historical masterpieces compete with the unique creations of nature.

Poltava region is located at the crossroads of important economic, historical-related routes between East and West, North and South, it has mild climatic conditions, a dense network of rivers (Psel, Vorskla, Sula) connected with the main shipping artery of Ukraine – Dnipro. The natural riches are complemented by the mineral water and mud resorts of Myrhorod town, Hadiach, Velyka Bahachka, Novi Sanzhary (there are 12 sanatoriums in the region), landscapes and regional landscape parks. In the Poltava region there are 337 territories and objects of the natural and preserve fund. ; 151 nature reserves (18 state values), 117 nature monuments (1 state values), Ustymivskiy arboretum park, 18 parks – monuments of landscape art (4 state values), 3 regional landscape parks, 49 nature reserves [11].

The most significant tourist and excursion objects of the region are architectural monuments of Lubenskyi (Mharskyi), Spaso-Preobrazhenskyi, Poltava Khrestovozdvyzhenskyi, Kozelshchyna Nativity of the Virgin Monastery of the XVII–XIX centuries, the Scythian ancient settlement UI-III BC in the village of Bilsk, Kotelevskiy region, the Trinity and Nicholas Churches, the bell tower and the Triumphal Arch in Dykanka village, monuments of architecture and museums (in the area of 23 museums of national importance) – Panas Myrnyi and V. H. Korolenko, local lore museum, museum I.P. Kotliarevskiy's estate in Poltava, the Museum of N.V. Hohol in Velyki Sorochyntsi and the Museum-Reserve of N.V. Hohol in Hoholeve village, Shyshatskyi region, the Center for Pilgrimage of Representatives of the Jewish Nation at the Place of Burial of Rabbi Shnur, the founder of Chabad Hasidism Zalman (Hadiach), Pyramid-Uspalnytisia (vault) of the noble family of Bilevychis (second in height – 15 meters) among the three pyramids of the Egyptian style in Europe and one of two such pyramids-tombs in the Poltava region (village Komendantivka), Monument to the Bulgarian Khan Kubrat, Pereshchepynskiy treasure (town Mala Pereshchepyna), the estate of Zakrevskiy Pyramid-tamping of Zakrevskiy's family (one of two pyramids, tombs of the Egyptian style in the Poltava region and one of three such pyramids in Europe, Berezova Rudka), historical and cultural reserve "Field The Battle of Poltava, the Ukrainian Pottery Museum-Reserve in Opishne, the H. Skovoroda Museum in Chornukhy, the Aviation and Cosmonautics Museum with an aircraft exposition in the regional center and others [14]. Thus, Poltava region has significant tourist and recreational resources, which are concentrated not only in the city of Poltava, but also the region. This is confirmed by the fact that there is still an inventory of cultural heritage sites in the region in order to form a single registry. It allowed to stimulate business activities with the aim of improving the service in tourism and the formation of a tourist product that could be promoted at the national and international level.

Cultural and educational tourism (ethnographic routes (Opishnia, Myrhorod, Pyriatyn – ceramics, Reshetylivka – embroidery and weaving) using folk crafts and handicrafts, organizing master classes are gradually developing. Especially in this direction makes efforts Opishnia.

There are significant development prospects in the field of sports, extreme tourism and with an active way of movement. There are opportunities for the effective operation of sports bases and camps, including the Korchak ski stadium (Stasi village), parachute tourism (Poltava), yacht clubs (Kremenchuk and Horishni Plavni), equestrian farms (Kremenchuk, Horishni Plavni, Lubny, Kobeliaky, Kotelva, Dibrivka, Myrhorod region, Yaresky in Shyshaky region, Berezova Rudka, Pyriatyn region, Sukhorabivka and equestrian sports schools, the restoration of which is carried out in the area. There are routes with river and river rafting, boat

rides, expeditions and routes (with an active way of traveling: equestrian along the river Psel, equestrian Cossack squadron of the village Sukhorabivka and in tourist canoes along the Vorskla river).

Nowadays the biggest development in the territory of the Poltava region has a green tourism. There are 10 routes of green tourism that have been developed in the region. In particular, Poltava – Dykanka – Hoholevo – Shyshaky – Yaresky, Poltava – Krotenky – Stasi – Mykhailivka, Poltava – S. Sanzhary – Kuntsevo – N. Sanzhary – Luchky, Poltava – Solonytsia – Kobeliachok – Hryhorii Bryhadyrivka, Poltava – Lubny – Pyriatyn, Poltava – Kremenchuk – Horishni Plavni (Komsomolsk), Poltava – Opishne – Kotelva, Poltava – Reshetylivka – Sukhorabivka, Poltava – Myrhorod – Sorochyntsi, Poltava – V. Bahachka – Bilotserkivka [13]. There are more than 70 farmsteads registered on the territory of the region: Zolota Sota, Zatyshna Oselia, Country House, Fun House, etc.

Thus, in the territory of Poltava region there is a potential for the development of the tourism industry, which will contribute to the preservation of cultural heritage. It will attract investment and turn into depressed areas in promising. However, there are both subjective factors that hinder the development of tourism and objective (imperfect accounting system of business entities providing accommodation services (hotels, motels, campgrounds) socio-economic instability of the economy, decrease in the real purchasing power of the population, military actions, disparity of the overwhelming number of international standards – a high degree of moral and physical deterioration of the material and technical base of enterprises, technological backwardness, low level of comfort of living and services offered).

Overcoming these shortcomings and further development will provide strategic management. The result will be the creation of an effective strategy that will allow:

- to provide resources with priority directions for the development of tourism in a particular territory;
- will display priority problems and solutions;
- coordinate the actions of all participants;
- will display long-term development priorities.

Consequently, the tourism development strategy will ensure the sustainable development of the territorial community. Balance the interests of all stakeholders (government, public organizations, society and business).

The experience of Ukrainian cities confirms: the involvement of citizens in strategic planning is necessary and effective at various levels of this process, namely:

- the territorial community should be aware of what is happening (informational level of participation);
- the active part of the society should be able to make their proposals and have guarantees that these proposals will be heard (consultative level of participation);

The competent part of the territorial community (“local elite”) should be able to directly participate in the processes of developing and implementing a strategy (partnership level of participation).

Therefore, it became necessary to develop documentation to support the development of tourism potential and develop a strategy that will allow not only to coordinate the actions of all participants (stakeholders), but also to provide a financial component. Since it is the strategy that will allow the community to receive information that they (the state of tourist and recreational resources), determine the potential and possibilities for further development. Set goals, objectives and performers, while taking into account the characteristics of the territories and their socio-economic situation.

An important role in the process of forming a strategy for the development of tourism at the community level is played by: first, information support; secondly, the quality of the study of tourism potential, and the last reality of the goals set. Consider in more detail. Information support of the process of developing and implementing a strategy plays a key role as the strategy itself. How complete, reliable and timely information will be collected will depend on the quality of further management decisions. However, in practice, the implementation of this task always causes difficulties, especially now when Ukraine has no registers of cultural monuments, which makes it difficult to account for them. Accommodation and catering facilities do not provide complete information on the number of visitors and the cost of services. Since tourism, in contrast to production, involves not only cultural and art institutions, but also accommodation, catering, transportation, etc.

The peculiarity of the formation of a tourism development strategy at the community level is that it is necessary to take into account: regional development strategies, local development strategies; spatial programs (master plans of settlements), annual programs of socio-economic development and cultural development of the territory. The result of the first stage is the preparation and formation of organizational and informational support of the strategy, which will allow for further analysis. The formal result of this stage is the formation of a passport of a certain territory (community). Organizationally, this is the creation of a project team that will deal with issues of analysis and strategy formation.

The next stage is the diagnosis of the state of development of tourism in a particular community. At this stage, modern tools of strategic analysis are used, namely: socio-economic analysis; comparative analysis; SWOT analysis; PESTLE analysis; sociological analysis.

The most widely used is the method of SWOT-analysis. (SWOT– strength – strengths, weakness – weaknesses, opportunities – opportunities and threats – danger, threats) [3].

Its main tasks at the community level are:

- identifying opportunities that correspond to the resources of the territory;
- the identification of threats and the development of measures to neutralize their impact;
- identifying the advantages of the territory and comparing them with market opportunities;
- identification of territory weaknesses and development of strategic directions for overcoming them;
- identification of the competitive advantages of the territory and the formation of its strategic priorities [3].

Analysis of factors of the internal environment (strengths and weaknesses) should reflect: geographical location; labor market; Natural resources; economy and industry; agriculture and agricultural processing; tourism and cultural and recreational potential; transport potential; infrastructure; e-management; ecology; local government market infrastructure and entrepreneurship.

The external environment is analyzed as a combination of factors that have opportunities (chances) for the development of tourism and risks. The results are: the definition of the strategic positions of individual types of tourism and measures to neutralize risks.

It is advisable to study the external method PESTLE-analysis of factors: political, economic, social, technological, legal, environmental factors.

PESTLE analysis provides the user with components that can be used to determine the key factors of the strategic development of a rural region (territory):

- P (Political). The political component includes tax policy, labor legislation, environmental protection.

- E (Economic). Economic means demand, exchange rate, number of unemployed.

- S (Sociological). Social – reflects the cultural norms, expectations, population growth.

- T (Technological). Technological – combines innovation, progress.

- L (Legal). Legal – says the impact on the number of jobs, access to materials.

- E (Environmental). Ecological – reflects climate change, emergency situations [1].

PESTLE analysis, in contrast to SWOT analysis, plays an important role in shaping the strategy for the development of tourism, since it allows determining objective factors. We can not influence them and must take into account. Develop measures to minimize the impact and prevent crises.

This will allow to form a strategic vision of the development of tourism of a particular OTG and its key factors for further development.

Next stage. This is the formation of strategic and operational objectives; creating a single plan of action and their descriptions; creation of project leaves, the formation of tasks. The prioritization of projects is carried out by means of an expert assessment method. Evaluation of each project (each of the operational goals) is based on the following criteria: feasibility, potential implementation dates, impact on the creation of new jobs and attracting investments, the level of contradictions with other goals, compliance with the strategic goal [10].

That is, when a strategy is determined, it is important to ensure its legitimacy and consistency with other strategic plans, namely: local development strategies, spatial programs (master plans for the development of individual territories) and annual programs for socio-economic development and cultural development of the territory. This will avoid conflict situations with all stakeholders.

The result of this stage is the formation of strategic tasks and ways to solve them by building a “tree of goals”. Each task is specified through strategic, tactical and operational objectives. There are established performers, temporary terms.

And the last stage. This is implementation and monitoring. Officially determine the bodies responsible for the implementation of projects send them project leaves together with the strategy to ensure interrelation with the budget process, conduct the formation of budget requests and other procedures according to the Budget Code, organize work with "external" financial sources [10]. Also, we believe that at this stage it is important to provide for sources of financing for monitoring and those responsible for the timely submission of information. Since the strategy should not be a formal plan, but a management tool that will allow to get a synergistic effect. Since tourism unites a significant number of industries and services.

It is important to note that in the process of shaping the tourism development strategy of a certain community, it is important to pay attention to the formation of a strategic vision of the development of a particular community, which should reflect the uniqueness of the territory (community). This will ensure sustainable development. Since the change of leadership, a change in the external environment will not affect the process of movement with respect to the purposeful development of society.

**Conclusions and suggestions.** Thus, the formation of a strategy for the development of tourism of the united territorial communities will ensure the balanced development of the territorial community, the rational use of all available resources and sustainable development.

**REFERENCES:**

1. Abramchuk B.O. Theoretical bases of introduction of SWOT-analysis as a means of strategic development of rural territories / B.O. Abramchuk // Land management, cadastre and land monitoring . – № 1. – 2014. – pp. 115–118.
2. Buryk Z. Analysis of the advantages and disadvantages of territorial development in terms of providing effective strategic planning [Electronic resource] – Access mode: [www.irbis-nbuv.gov.ua/cgi-bin/irbis\\_nbuv/cgiirbis\\_64.exe](http://www.irbis-nbuv.gov.ua/cgi-bin/irbis_nbuv/cgiirbis_64.exe)
3. Wagner I.M. SWOT-analysis as a tool for strategic analysis / I.M. Wagner // Bulletin of Kryvyi Rih Economic Institute of KNEU. - No. 4-. 2009-8.8-85.
4. Lelechenko A.P. Local self-government in conditions of decentralization of authority: teaching manual / [ A. P. Lelechenko, O. I. Vasiliev, V. S. Kuibida, A. F. Tkachuk] – K., 2017. – 110 p.
5. The Law of Ukraine “On Stimulating the Development of Regions” [Electronic resource] – Access mode: <https://zakon.rada.gov.ua>
6. The Law of Ukraine "On Planning and Development of Territories" [Electronic resource] – Access mode: <https://zakon.rada.gov.ua>
7. Decree of the Cabinet of Ministers of Ukraine “On Approval of the State Regional Development Strategy for the Period up to 2020” [Electronic resource] – Access Mode: <https://zakon.rada.gov.ua>
8. Order of the Ministry of Regional Development, Construction and Housing and Communal Services of Ukraine "Methods of developing, monitoring and evaluating the effectiveness of the implementation of regional development strategies and action plans for their implementation" [Electronic resource] – Access mode: <https://zakon.rada.gov.ua>
9. Order of the Cabinet of Ministers of Ukraine “On approval of the Concept of improving the system of forecasting and program documents on the issues of the socio-economic development of Ukraine” [Electronic resource] – Access mode: <https://zakon.rada.gov.ua>
10. Osypov, V. M. Strategic planning as an effective tool for managing regional development [Text] / V.N. Osypov, I.D. Pyvovarchuk, I.L. Parasiuk // Bulletin of Sumy State University. Economy series. – 2011. – №1. – pp. 89-100.
11. Regional program for the development of tourism and resorts in the Poltava region [Electronic resource] – Access mode: [poltava-tour.gov.ua/.../oblasna-programa-rozvitku-turizmu-i-kurortiv-na-2016-2020-..](http://poltava-tour.gov.ua/.../oblasna-programa-rozvitku-turizmu-i-kurortiv-na-2016-2020-..)
12. Reform of decentralization [Electronic resource] – Access mode: <https://www.kmu.gov.ua/ua/diyalnist/reformi/reforma-decentralizaciyi>
13. Routes of green tourism in the region [Electronic resource] – Access mode: <http://www.adm-pl.gov.ua/page/marshruti-zelenogo-turizmu-v-oblasti-0>
14. Museum and monuments of Poltava Region [Electronic resource] – Access mode: <http://poltava-tour.gov.ua/page/muzeyi-ta-pamyatni-miscya>.

УДК 338.486 : 351 (438

JEL R13, L83

**Черниш Ірина Володимирівна**, доктор економічних наук, доцент. **Глєбова Алла Олександрівна**, кандидат економічних наук, доцент. Полтавський національний технічний університет імені Юрія Кондратюка. **Федорченко Лілія Вікторівна**, заступник начальника управління- начальник відділу розвитку туризму і музейної справи управління розвитку туризму, музейної справи та охорони культурної спадщини. Департамент культури і туризму Полтавської облдержадміністрації. **Методичні аспекти процесу формування стратегії розвитку туризму об'єднаних територіальних громад : інформаційний аспект.** У статті досліджується процес формування стратегії розвитку туризму на рівні об'єднаної територіальної громади. Визначено, що процес формування стратегії розвитку туризму передбачає здійснення низки організаційних заходів. Тому виникла необхідність розроблення стратегії та документаційного забезпечення процесу розвитку туристичного потенціалу. Це сприятиме не тільки скоординованню дій усіх учасників (стейкхолдерів), але й забезпеченню фінансової складової. Стратегія дозволить громаді отримати інформацію про те, що вона має (стан туристично-рекреаційних ресурсів), визначити потенціал і можливості подальшого розвитку, установити цілі, завдання й виконавців, урахувавши при цьому особливості територій та їх соціально- економічне становище. Для аналітичного забезпечення стратегічного аналізу пропонується використати SWOT- аналіз і PESTLE-аналіз. Це дозволить сформувати стратегічне бачення розвитку туризму певної територіальної громади та ключові її фактори подальшого розвитку. З початку 90-х років минулого століття в

Україні поступово будеться європейська модель взаємовідносин державної влади і місцевого самоврядування. На шляху децентралізації та реформування місцевого самоврядування ключовим орієнтиром є Європейська хартія місцевого самоврядування (далі – Хартія), яку держава без застережень ратифікувала 15 липня 1997 р [4, с.17]. У результаті вже створено 665 ОТГ (у 51 ОТГ вибори відбулися 24.12.2017), що об'єднали 3 118 громад (27,8% від загальної кількості місцевих рад станом на 01.01.2015) та 5,7 млн осіб (13,4% загальної кількості населення України). У процесі децентралізації громади здобули ресурси, фінанси, повноваження – значний інструментарій і можливості для забезпечення повноцінного місцевого розвитку. Головна стратегічна мета реформи – створення комфортного та безпечного середовища для життя людини в Україні. Це можна буде досягнути шляхом побудови ефективної системи влади на всіх рівнях (громада – район – область), передачею максимально можливої кількості повноважень на найближчий до громадянина рівень – громадам, а також створенням умов для динамічного розвитку регіонів і надання якісних та доступних суспільних послуг громадянам [12]. Таким чином, громада, крім ресурсів, отримує повноваження й низку викликів. Це обумовлює необхідність використання стратегічних підходів до управління та формування стратегій, що знайшло підтримку на державному рівні.

**Ключові слова:** стратегія, громада, туризм, об'єднана територіальна громада, місцеве самоврядування

УДК 338.486 : 351 (438)  
JEL R13, L83

**Chernysh Iryna**, Doctor of Sciences (Economics), Associate Professor. **Hliebova Alla**, PhD (Economic Sciences), Associate Professor. Poltava National Technical Yuri Kondratyuk University **Fedorchenko Liliia**, Deputy head of the department of tourism development and museum business of the department of tourism development, museum business and protection of cultural heritage of the department of culture and tourism of the Poltava regional state administration. **Methodical aspects of the process of forming the development strategy of tourism development of the united territorial societies: information aspect.** The article examines the process of forming a strategy for the development of tourism at the level of a united territorial community. It has been determined that the process of forming a tourism development strategy envisages the implementation of a number of organizational measures. Therefore, there was a need to develop documentation to ensure the development of tourism potential and develop a strategy. This will help not only to coordinate the actions of all participants (stakeholders), but also to provide a financial component. The strategy will allow the community to receive information that they (the state of tourist and recreational resources), to determine the potential and opportunities for further development. Set goals, objectives and performers, while taking into account the characteristics of the territories and their socio-economic situation. For analytical support of strategic analysis, it is proposed to use SWOT analysis and PESTLE analysis. This will allow to form a strategic vision of the development of tourism of a certain territorial community and its key factors for further development.

**Keywords:** strategy, society, tourism, united territorial community, local self-government.

УДК 338.486 : 351 (438)  
JEL R13, L83

**Черныш Ирина Владимировна**, доктор экономических наук, доцент. **Глебова Алла Александровна**, кандидат экономических наук, доцент. Полтавский национальный технический университет имени Юрия Кондратюка. **Федорченко Лилия Викторовна**, заместитель начальника управления- начальник отдела развития туризма и музейного дела управления развития туризма, музейного дела и охраны культурного наследия. Департамент культуры и туризма Полтавской областной государственной администрации. **Методические аспекты процесса формирования стратегии развития туризма объединенных территориальных общин: информационный аспект.** В статье исследуется процесс формирования стратегии развития туризма на уровне объединенной территориальной общины. Определено, что процесс формирования стратегии развития туризма предусматривает осуществление ряда организационных мероприятий, поэтому возникла необходимость разработки документационного обеспечения процесса развития туристического потенциала. Это будет способствовать не только скоординированности действий всех участников (стейкхолдеров), но и обеспечению финансовой составляющей. Стратегия позволит общине получить информацию о том, что она имеет (состояние туристско-рекреационных ресурсов), определить потенциал и возможности дальнейшего развития, установить цели, задачи и исполнителей, учитывая при этом особенности территорий и их социально-экономическое положение. Для аналитического обеспечения стратегического анализа предлагается использовать SWOT- анализ и PESTLE-анализ. Это позволит сформировать стратегическое видение развития туризма определенной территориальной общины и ключевые ее факторы дальнейшего развития.

**Ключевые слова:** стратегия, община, туризм, объединенная территориальная община, местное самоуправление.