

# **TERRITORIAL DEVELOPMENT: STRATEGIC CONTEXT**

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**Nataliia Bielousova**

*Doctor of Economics, Associate Professor,  
Senior Lecturer at the Department of Aerospace Geodesy  
and Land Management  
National Aviation University*

## **SOCIO-ECONOMIC ASPECTS OF THE DEVELOPMENT OF INCLUSIVE TOURISM IN THE REGIONS OF UKRAINE**

One of the multifunctional areas of providing accessible rehabilitation and social functions is inclusive tourism with its diverse range of services and methods of providing the necessary assistance. The problem of development and practical implementation of inclusive tourism in the socio-economic system of the regions of Ukraine is a new and quite promising trend in tourism, which allows to involve in tourism activities representatives of low-income and socially vulnerable segments of the population. The most unaccepted social category for life and tourism in Ukraine are people with disabilities. Studying the problems of adaptation, recreation, various aspects of rehabilitation of people with inclusion, allows to regulate the issues of socio-economic nature, to develop promising strategies for the gradual implementation of inclusive tourism and to offer programs of practical assistance to people of inclusive categories.

The subject-objective essence of inclusive tourism as a new scientific and practical direction in the socio-economic system of regional development of Ukraine allows to talk about inclusive tourism as a segment of tourism activities, which may include not only comfortable tourist services, but also recreational and rehabilitation services as part of tourism activities.

### **Introduction**

Global problems of humanity: aging, conflicts, lifestyles, etc. lead to an increase in the number of people with special needs. This trend can be seen in different aspects, depending on the level of socio-economic development, the democratization of society is recognized and can be addressed in different countries.

The presence in society of a social group of vulnerable and unprotected members creates problems ranging from quality of life to social exclusion, which can complicate both socio-economic and socio-political processes.

One of the mechanisms for preventing negative phenomena associated with the social rejection of vulnerable parts of the population is their social adaptation to the environment using tourist activities. In turn, inclusive tourism is an effective mechanism of social adaptation of people with special needs as the most universal and versatile direction of health, recreation, rehabilitation, environmental learning, performing social, recreational, cultural, environmental and economic functions.

The essence of tourism as a mobile form of consumption and recreational activities based on overcoming space, connects with the territory and regions, the nature of the environment in the broad sense of the term (not only natural, but also socio-cultural and economic environment of human life), emphasizing the multidisciplinary nature of its research.

People with disabilities are one of the most vulnerable categories. In developed countries much attention is paid to their socialization with the help of tourism, and inclusive tourism has long become a certain type of tourism. Consideration of foreign experience and domestic practice makes the study of the development of inclusive tourism relevant.

The multifaceted problematics of inclusive tourism is considered in the works of economists (I. Bobukh, V. Geyets, A. Gritsenko, I. Mantsurov, O. Prognimak, S. Shchegel, etc.), geographers (O. Lyubitseva, O. Beydyk, M. Krachilo, A. Kolupaeva, M. Mironenko, I. Topalova), sociologists (O. Kravchenko, I. Gubenko L. Koval, A. Voitovskaya), physicians (V. Lepsky, I. Borisova, S. Makarenko), teachers (N. Nayda, N. Sofiy, I. Yarmoschuk K. Kolchenko, O. Rasskazova, T. Buchinskaya) and representatives of other scientific fields (I. Droga, A. Ostapets-Sveshnikov, L. Rubis, S. Sergeeva), including scientists from the near abroad (A. Seselkin, A. Makhov, V. Chepik, A. Bavel'sky, L. Mezheva, N. Sereda, N.D. Malysheva).

Among foreign scientists, it is worth noting the works of D. Witmoglou [Daron Acemoglu] R. Barro [Richard Barro], John Henry Williams [John Henry Williams], John Henry Gray [John Henry Gray], Esther Duflo [Esther Duflo], R. Coase [Ronald Harry Coase], Claus Schwab, Douglas North, Rodney Porter, James Robinson.

Formalization of the approaches of various scientists allowed a comprehensive review of the existing problem and concluded that a number of issues aimed at analyzing the development potential of the regions is still insufficiently developed and studied. This problem is particularly acute through the prism of the development of ideas of potential analysis as a new, independent type of economic analysis [11, p. 100–104]. This fact testifies to the point that the problematic issues of socio-economic character require constant improvement.

In many countries, tourism has become an important sector of the economy, ranking third in total world exports. At the same time, tourism remains understudied and minimally researched in the direction of the dynamic development of inclusive tourism, the importance of which is increasing due to

the constant increase in the relative and absolute number of people with limited mobility and people with disabilities in various nosologies around the world, including in Ukraine.

An important direction in the development of tourist regions of Ukraine is the development and implementation of regional target programs in the field of inclusive tourism in the form of a standard structure. However, the development of socio-economic mechanisms for the development of inclusive tourism at the regional level is extremely insufficient, which determined the direction of this study.

### **Part 1. Methodological principles and approaches to ensure socio-economic development of inclusive tourism**

The tourism industry is one of the most versatile to provide opportunities for people with inclusion, to feel like a full member of society, to have the opportunity to realize their dreams, travel, participate in leisure programs and master classes [1]. But this requires funding for the tourism industry to develop routes for different categories of inclusive tourists, to upgrade the material and technical base of hotels and restaurants, to make accessible tourist attractions and sightseeing facilities, to expand the park of special vehicles to transport people with disabilities.

To understand the actual problems of development and the mechanism of implementation of inclusive tourism in the regional economy of Ukraine there is a need for a comprehensive study of the theoretical and methodological components and justification of the practical expediency of the introduction of inclusive tourism in the Ukrainian environment.

In general, the potential for the development of inclusive tourism is aimed at improving the management system and the main directions of the regions, as well as the search for a set of opportunities for its development. In turn, the development potential is closely related to the strategic potential for the implementation of this direction [13, p. 147–155].

Two main scientific approaches can be summarized in the methodology of analysis of the potential for the development of inclusive tourism:

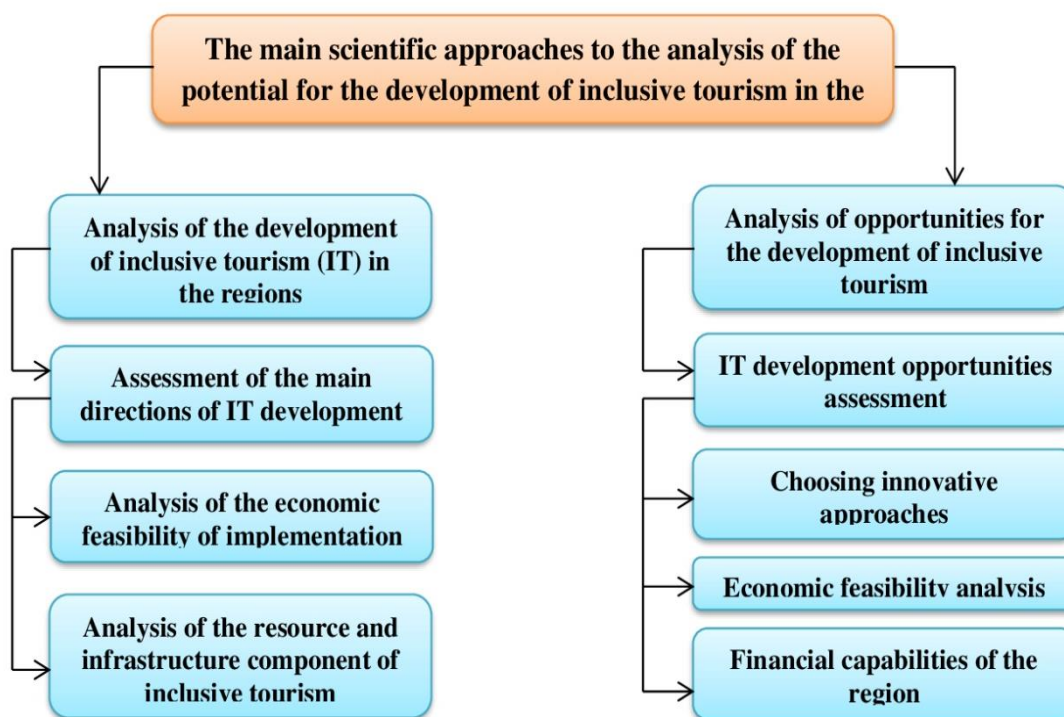
1. An approach aimed at analyzing the prospects for the development of inclusive tourism in the regions as a component of the economic system of Ukraine.

2. The approach aimed at analyzing opportunities for the development of inclusive tourism (Figure 1) [13, p. 147–155].

Each region independently chooses the necessary promising approaches and develops strategies for the development of inclusive tourism, taking into account the resource component, infrastructure capabilities, the level of funding and economic potential of the region.

When considering the potential development of inclusive tourism, the basis of the study are the resource and infrastructure capabilities of the economic system, namely the unrealized potential of the organization, functional

relationships and interacting processes. To assess the set of opportunities for the development of inclusive tourism, it is necessary to consider the likelihood of strategic objectives, based on the level of economic development of the region, its resource base, the potential of the territory and other components, which corresponds to the ideas of the philosophy of the possible.



**Figure 1. The main scientific approaches to the analysis of the potential development of inclusive tourism in the regions**

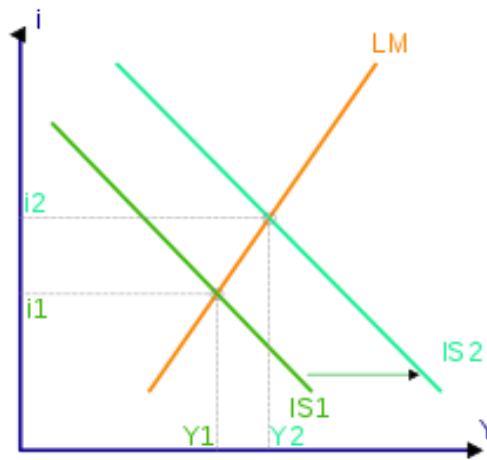
*Source: author's design*

Thus, it can be stated the fact that any research should have a scientific and methodological basis through a variety of approaches that help to determine the forms and methods of scientific research and propose strategies for the development of a particular direction. In this case, in the direction of development of inclusive tourism.

Stable economic development of regions requires an analytical assessment of the opportunities and prospects for their development. For this purpose, it is logical to use ex-post (macroeconomic) analysis (analysis of the past states of the region's economy using certain indicators) and ex-ante (macroeconomic) analysis, which will help model the future states of the region's economy using macroeconomic modeling.

Within the framework of the system approach, it is possible to apply the methodology of scenario analysis of possible ways of development of the region, general economic equilibrium for endogenous determination of inflation (GRP deflator) and economic growth rates of regional potential, as

well as the principle of IS-LM models to create a model of the aggregate demand function (Figure 2).



**Figure 2. Diagram of IS – LM model for determining the aggregate demand for tourist services for inclusive tourists**

*Source: [16]*

The IS – LM model serves as the basis for determining the aggregate demand for tourist services for inclusive tourists and regulates the quantitative and pricing policy of the tourist enterprise. In addition, this model shows the interrelation between interest rates and equilibrium on both the commodity and the money markets. The commodity market is modeled as an equality between investment and public and private savings (IS), and the money market is modeled as a balance between the supply of funds and the advantage of liquidity.

The IS curve consists of points (combinations of income and interest rate) at which investment, given the interest rate, equals public and private savings, given output. The IS curve has a downward slope because in a commodity market output and the interest rate are inversely related: more income is saved as output increases, which means that interest rates must be lower to stimulate enough investment to match savings. For the introduction of a new tourist destination, an assessment of the profitability of a particular region is fundamental.

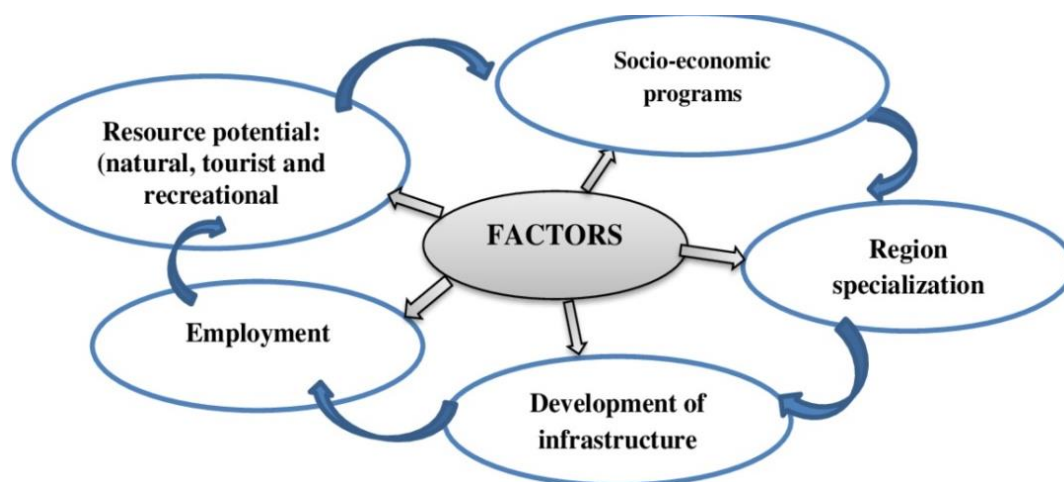
When the interest rate is positive, the LM curve slopes upward because there will be a positive relationship in the money market: as income (identical to equal output) increases, the demand for money increases, which leads to an increase in the interest rate to simply compensate for the initial increase in the demand for money. This trend is possible with the different resource potential of the region, its industry structure and developed infrastructure.

In this example of the IS / LM graph, the IS curve moves to the right, resulting in higher interest rates ( $i$ ) and an increase in the region's economic potential (real GDP, or  $Y$ ).

Robert Solow's neoclassical growth model has become the generally accepted model for explaining economic growth in the long run. The basis of the model is the production function, where the product of production is the amount of capital and labor to be used at a constant rate of regional development. The construction of the model helps to abstract away from secondary elements and focus on the main components of the system and their interrelationships.

In this context, the prospects for the development of inclusive tourism will significantly depend on the volume of production or fixed capital of tourist enterprises, which will ensure their economic growth. The second important factor is the demographic characteristics of the regions (increase or decrease in population), which determine the profitability of tourist enterprises in a particular region and the possibility of developing new areas of tourist activity, such as inclusive tourism. The third factor regulating socio-economic relations, according to the model of R. Solow, is the level of wear and tear of resources and material and technical base of the regions. In the tourism industry, the system of implemented innovative technologies acts as a technological process that increases the level of service for tourists, creating a competitive tourist product.

Given the processes of decentralization of power in Ukraine, the question arises about the development of the regional economy, which in each region is based on several main factors: 1 – region's specialization (industrial, agricultural, mixed type); 2 – development of regional infrastructure (enterprises of different branches, transport infrastructure); 3 – level of subsidies (one-time, annual, etc.); 4 – demographic, which can be divided into: numerical (working, unemployed, children, pensioners) and age structure (children of preschool and school age (under 18 years)), young people (under 35 years), middle-aged people (35–55 years), elderly people (56-70 years), old people (over 70 years) (Figure 3).



**Figure 3. Factors in the development of the regional economy**

*Source: author's design*

In Ukraine today there is a significant lag in the pace of implementation of measures to support the tourism sector, which is a serious threat to the competitiveness of the industry in the international market during the projected recovery period (during 2021).

Given the ongoing financial reforms in Ukraine, as well as drawing attention to the relatively small share of tourism in the economy, the recovery of the tourist segment of the economy of our country is possible by V-shaped scenario (the continuation of the situation in its current form). Due to the structure of the Ukrainian economy, this model can avoid more serious problems compared to other countries of the world.

For the development of inclusive tourism such economic crisis has become a serious test of financial solvency, social guarantees, as well as the implementation of practical tasks for the implementation of this direction.

In the context of globalization and regionalization of the world economy, it is possible to highlight the following trends in the development of the Ukrainian market of tourist services as:

1. The formation of tourist services as a product focused on improving the level of tourist services, which was dictated by significant changes in the overall socio-economic situation of tourists, and as a consequence, the differentiation of the tourist product.

2. Orientation of the tourist product to the needs of specific target groups (recreational, recreational, congress and exhibition, cognitive, religious, nostalgic, transit, amateur and other types of tourism).

3. Active development of network trade in tourist services, which are represented by associations of legally independent operator companies and travel agencies under a common brand.

4. Increase the level of state socio-economic support for the tourism industry (visa facilitation, refund of value added tax, a strong marketing policy).

5. Formation of an authentic brand of tourist region (organization of thematic events (presentations and working meetings), the development of health complexes – spa hotels in resorts with mineral waters) [1].

In the process of overcoming non-standard situations, it is necessary to provide inclusive tourists with the possibility of choice and certain guarantees of social assistance, to offer possible prospects. This is what determines the goals and means of the process of social rehabilitation by restoring people's social status, their adaptability to certain (new) conditions of life [8].

## **Part 2. Generalization of tools for assessing the socio-economic development of inclusive tourism**

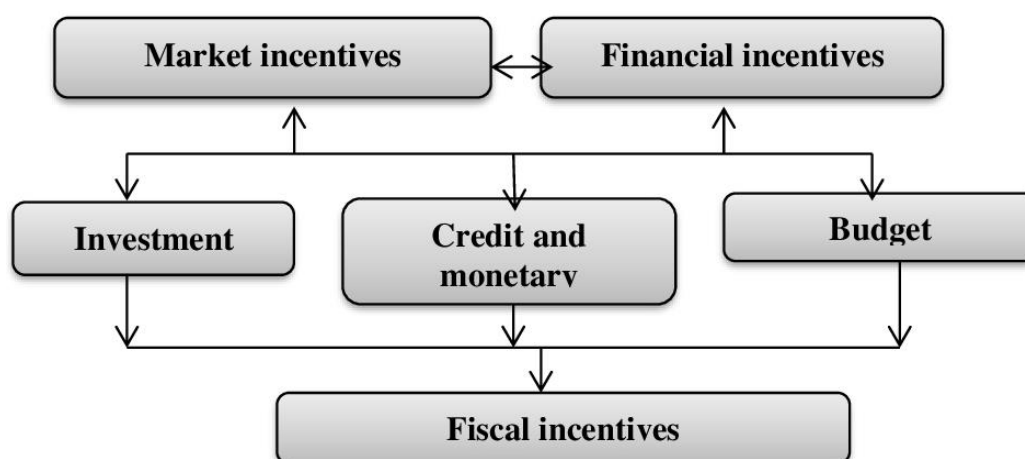
At the moment, inclusive tourism is one of the most uncovered niches of the Ukrainian tourism market, so it requires the development of new and generalization of existing tools to assess the socio-economic development of inclusive tourism.

Social, economic and organizational and managerial incentives serve as tools for assessing the level of socio-economic development of the region.

The toolkit of the social sphere is characterized by:

- the creation of a system of social services: centers, government agencies, and organizations;
- programmatic planning for the social development of the region, taking into account the resource capabilities, infrastructural branching and economic potential and needs of the population;
- the development of social programs for vulnerable groups, including people with disabilities as a category of persons with inclusion;
- the involvement of the private sector in the budgetary programs for regional development through regulatory and legal mechanisms;
- paid social services;
- the professionalism of public sector organizational and management personnel at the local and regional levels.

For the development of the economic sphere in the regions of Ukraine tools are provided (Figure 4).



**Figure 4. Scheme of economic instruments for regional development**

*Source: author's design*

Organizational and managerial tools are considered necessary and consist of the following components:

- organization and management of resource, infrastructure, production, economic and social potential using public funding;
- the development of strategies and programs for socio-economic development of regions (State Strategy for Regional Development for the period up to 2020);
- coordination and interaction of local, regional and state authorities for the implementation of the planned socio-economic development programs of the regions.

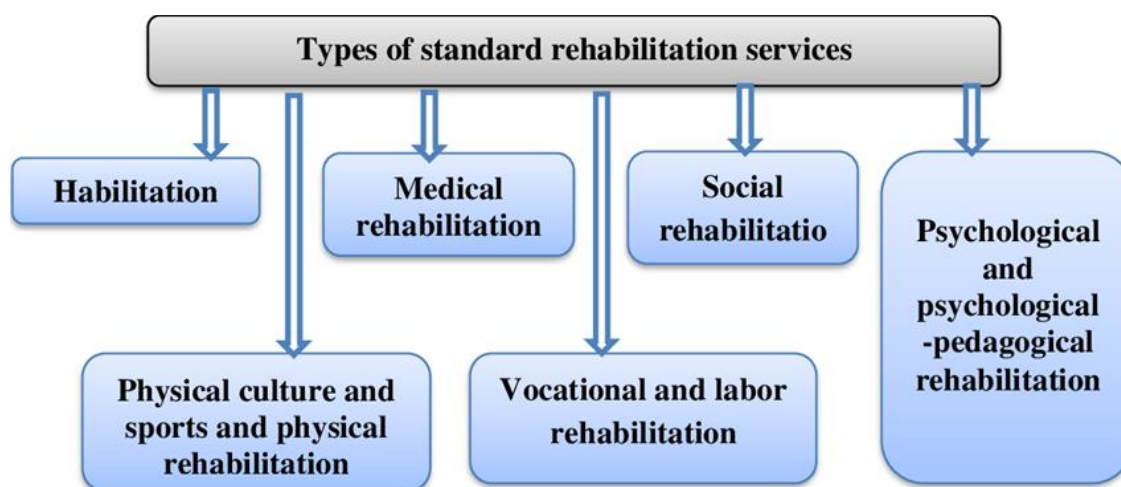


This toolkit is enhanced by the industry specialization of the region, production capacity, resource potential, which ultimately affects the development of the economic sphere, financing the intangible sphere, social development of the population and creates prerequisites for the development of the service sector, including inclusive tourism as a new direction of tourist activity.

The rehabilitation problems of people of various inclusive categories can be most comprehensively solved through extensive use of tourist resources, which with modern recreational, technical and economic opportunities can be used for consumption and production of the tourist product [4, p. 23–34].

As a rule, ordinary Ukrainians use tourist services, but people with disabilities of different groups and nosologies or other groups related to inclusive tourists, it is quite difficult to take advantage of the opportunity of accessible recreation. The most vulnerable group in any country were and still are people with disabilities.

Inclusive tourism can be considered as a mechanism for providing rehabilitation and recreational services, structurally including various types of rehabilitation and socialization, namely: medical, psychological, psychological and pedagogical, professional, labor, physical and sports, social and other types of social activities (Figure 5) [7].



**Figure 5. Types of standard rehabilitation services**

*Source: author's design*

According to the annual monitoring of the world tourist flows, the number of inclusive tourists is growing every year, despite the peculiarities and specifics of the organization of tourist trips, in which, for example, people with disabilities (blind, deaf, mute, spinal patients, cerebral palsy, etc.) need special living conditions, food, communication, transport and possibly medical support (accompaniment of a rehabilitation therapist, family member, nurse) [1].

It is established that depending on the nature, content and tasks of social or personal problems that need to be solved, certain types of social rehabilitation are used.

Based on this reasoning, socio-economic rehabilitation is a set of measures aimed at restoring the lost social ties and relations, properties and capabilities of the person, taking into account the attractiveness of the objects of recreational use in the framework of socio-economic relations [7].

The need for social rehabilitation is a universal approach that depends on the specifics of each individual, who during his or her life is forced to change the familiar social environment, forms of activity, to face situations that indicate (push) the need for some social rehabilitation assistance [12, p. 131–134].

The inclusion of a form of rehabilitation in the process of providing tourism services makes it possible to expand the understanding of inclusive tourism to the concept of inclusive rehabilitation and social tourism as a means of recovery, socialization and communication of rehabilitants. This assumption allows a broader view of inclusive tourism in terms of its application, namely:

- tourism provides mobile activities, carries out therapy and disease prevention, and stimulates the rehabilitant to maintain physical health. Tourism as an active form of recreation (rehabilitation) can include various activities of entertainment, sports, animation, excursions, which distract people from everyday life;

- tourism has geospatial possibilities for rehabilitation of the person with various manifestations, phenomena, ethno-cultural features, language, adapts people, especially people with disabilities, to life in modern society, helps to form and establish versatile social contacts, to create a full-fledged communicative environment [5, p. 36–52];

- tourism performs a normalizing function of restoring physical strength and emotional state for the implementation of production processes and the domestic environment of the person;

- tourism, as a type of human activity in the natural and ecological environment, promotes a positive attitude and recreation due to the natural features and recreational resources (appropriate climate, proximity to water, forest resources, etc.).

Comprehensive approach of specialists in the tourism industry in introducing people with disabilities to the public environment will help to develop rehabilitation and social programs (trips, tours, animation and excursion programs, nature workshops, etc.) and, in the future, will help to improve progressive methods that are already making their first steps, having their own concepts, approaches and forms.

In this case, the concept of inclusive tourism is expanded, defining it as inclusive rehabilitation and social tourism in the system of regional economic relations.

The main forms of rehabilitation and social assistance in the development of inclusive tourism are:

– *recreation* is the use of resort and recreational (health and therapeutic) natural and recreational tourist resources for physical recreation and psycho-emotional state of a person;

– *adaptation* is the adjustment of a person with inclusion to the peculiarities of existence and life within the specific society of their country, as well as the ability to adapt to the societies of other countries. This form of rehabilitation can be both specific (assistance from a rehabilitation therapist, vocational educator, tourism specialist, etc.) or comprehensive (consisting of several of the above positions);

– *socio-psychological rehabilitation* is targeted professional assistance (medical, psychological, psychotherapeutic, comprehensive) designed to provide a highly specialized or comprehensive service aimed at restoring the physical and spiritual strengths and the psycho-emotional state of the rehabilitated person. Recall that social rehabilitation is understood as ensuring the conditions for a person's return to active participation in life, restoration of social status, and the ability to engage in independent social and family life activities through social-medical orientation and social adaptation;

– *psychological rehabilitation* is a system of measures aimed at the restoration and correction of psychological functions, qualities and properties of the personality, creating favorable conditions for the development and formation of the personality [8].

In this context, tourism acts as an export specialization of the state, which can provide the rise of socio-economic level of Ukraine through a clear and balanced recreational use of nature, a wide range of resources for medical and health directions, a significant array of historical and cultural heritage, the Ukrainian characteristics and traditions of the people and other factors [6].

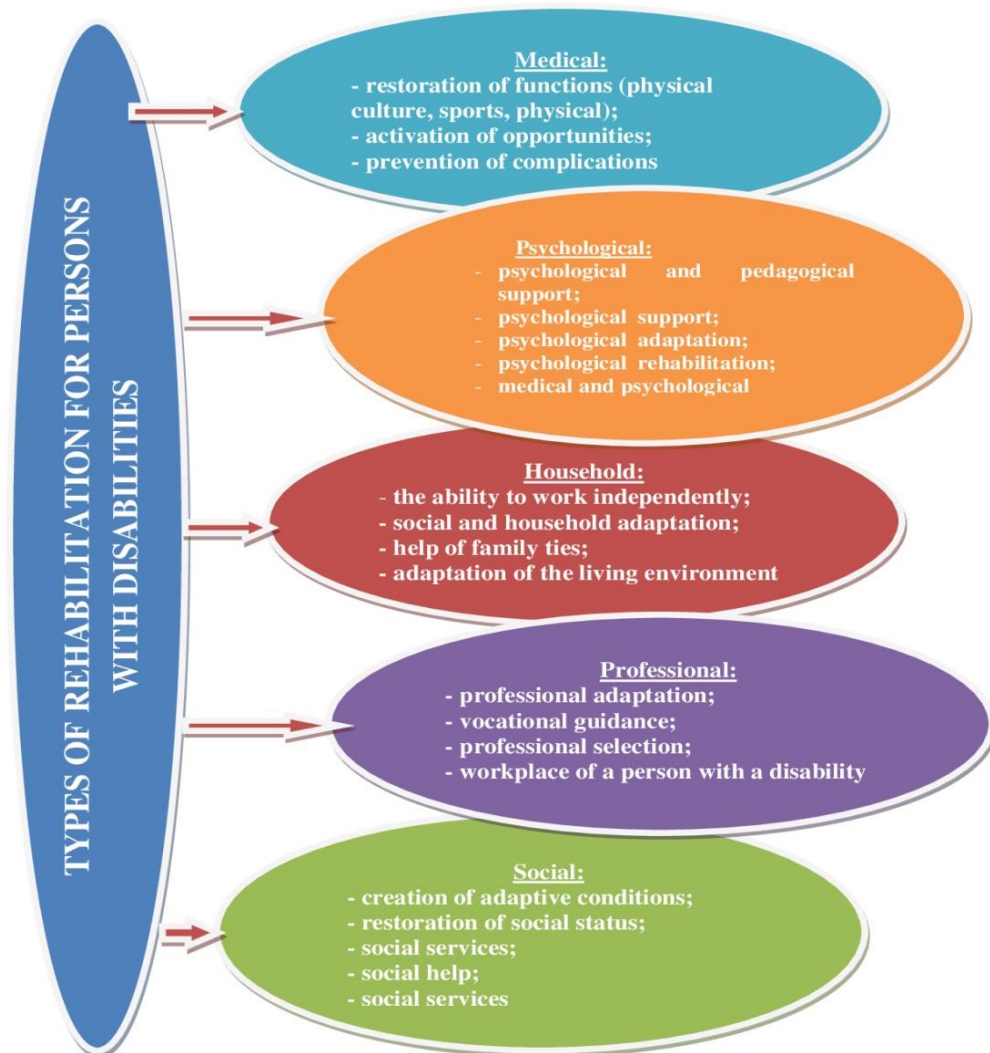
Due to the growing demand for inclusive tourism services, the development and implementation of new effective types of rehabilitation that meet modern trends in the development of society will make it possible to build a unified state system of medical and social protection to preserve physical and psychological health of the population of Ukraine. And it confirms the concept that inclusive tourism can be seen as a means of rehabilitation.

Returning to the issue of classifiers by type of tourists within the tourism market of Ukraine, it should be noted that the most uncovered groups of potential tourists are people with special needs, for which the types of rehabilitation, the characteristics of which are given below (Figure 6) [8].

Since the main goal of rehabilitation is the restoration of the disabled person's social status, achievement of material independence and social adaptation, there is a certain stage in the implementation of rehabilitation measures, which includes the following:

- determination of rehabilitation potential;
- drawing up an individual rehabilitation program;
- conducting medical and occupational rehabilitation;
- determination of the rehabilitant's needs for other types of rehabilitation;

- carrying out activities to realize the rehabilitation potential within the framework of the individual rehabilitation program;
- dynamic control over the rehabilitation process and, if necessary, its correction [9].



**Figure 6. Scheme of rehabilitation types for people with disabilities**

*Source: author's design*

The problem of providing tourist services to this group requires special attention from society (Table 1) presents known models of disability.

The medical model includes people with congenital or life-long acquired pathologies. Medical care in various areas improves a person's life, both physically and psychologically [2].

The economic model includes people with disabilities (they cannot work, or work limited hours) [8].

Table 1

**Descriptive characteristics of the main models of disability**

<b>Model category</b>	<b>Category attributes</b>	<b>Types of adaptation</b>
Medical	Congenital or acquired abnormalities indicating a person is mentally or physically handicapped, or a combination of these abnormalities	Restoration of health (physical, mental) is achieved by medical methods
Economic	People who have certain work limitations (cannot work or work a limited amount of time), a person's inability to perform certain functions available to healthy people	The desire and activity of the individual to perform certain economic functions (involvement in productive activities, with accessible types of work), the presence of favorable social circumstances
Social	Formation of a situation of social inactivity, alienation and degradation of the individual	Creation of favorable conditions for social adaptation to modern life, full self-realization and integration into society as part of «independent living»

*Source: author's design*

The social model of disability is characterized by a restriction on a person's standard functioning in society, in which his environment plays the main role. People with disabilities (with physical and mental disabilities) have a situation of social inactivity, alienation and personal degradation. Under such conditions, the result of the adaptation of people with disabilities is not only the creation of favorable conditions for their successful adaptation to modern life, but also the most complete self-realization and their integration into society as part of everyone's «independent life». Functional limitations will be categorized as cultural differences, which means that social and pedagogical workers and other highly specialized professionals need to pay special attention not only to direct professional work with people with functional limitations, but also to educational and outreach activities in the immediate social environment [3, p. 92–95].

In modern Ukraine, the most common form of care for people with disabilities is the model of institutional support, which, as a rule, was kept in post-Soviet countries, to which Ukraine belongs [14, p. 36–40]. This model presupposes the socialization of people of these categories and nosologies within the walls of children's (specialized) homes, boarding schools, vocational schools, and, recently, some higher educational institutions [15].

This entire system existed in Ukraine (actually, it still exists today) for children with disabilities. To obtain positive results in the work of this category, it is necessary to pay attention to the training of teachers to work with children with disabilities through seminars, individual consultations, master classes with

the participation of a psychologist, medical and social workers, and tourism workers [10].

While previously the goal was to give disabled children, for example, a pre-vocational education in such specialties as seamstress, embroiderer, PC user, woodworker, etc., now the range of professions is increasing due to modern methods of implementing comprehensive adaptation of people with disabilities into society, such as: teacher, medical worker, cashier, goods clerk, mid-level manager, tourist specialist, etc.

Studying foreign experience in the development of inclusive tourism, attention was drawn to the complexity of the approach of specialists in the tourism industry to attract people with disabilities to the public environment. In Ukraine it is proposed to consider inclusive tourism using rehabilitation and social programs (travel, tours, animation and excursion programs, nature master classes, etc.). This approach has the prospect of developing progressive methods, which are already taking their first steps, have their own concepts, approaches, forms and features.

The subjects of the socio-economic segment of the regional development of inclusive tourism include:

- social specialists are social workers, employees of tourism and related industries, labor experts, occupational therapists, sociologists, representatives of social security agencies, lawyers, representatives of businesses, trade union organizations [7, p. 217–233];
- specialists in the field of economics, management and marketing, regulating financial and communication issues of development and implementation of inclusive tourism;
- specialists in the field of regional management of economic development processes and administration;
- educational professionals are social pedagogues, sign language interpreters, and psychologists;
- professionals of the health-improving sphere are doctors, rehabilitation therapists, physical therapists, exercise and sports specialists, psychotherapists, and rehabilitation coaches;
- tourism specialists [8].

Given the multifaceted nature of rehabilitation care and its spatial and geographical orientation, it is proposed to consider rehabilitation not only in terms of medicine, sociology or psychology, which are reflected in the socio-economic space, but also in the framework of rehabilitation through recreational and tourist components, where a significant role played by tourism as a means of full rehabilitation.

Based on the above, it can be said that to implement the process of development and implementation of inclusive tourism as a new project in the tourism industry, it is necessary to have a realistic idea of the resource indicators of the regions (and they are different in each region) and the cost-effectiveness of the desired results.

## Conclusions

1. Inclusive tourism is justified as a scientific category in the socio-economic system of regional development of Ukraine, proposed in the work as a complex of tourist services, including recreation, rehabilitation processes and adaptation of people with disabilities to socio-economic conditions.

2. The imperative of modern tourism development is the completeness of tourist needs, achieved by the maximum quality of tourist services and safety of the environment of the temporary tourist stay.

3. Regional economy to meet the tourism needs of people with inclusion, taking into account the resource, infrastructure, financial, production, consumer (material, spiritual), economic, technological, political and social conditions and relations, which allowed to integrate three scientific directions (sociology, economics and tourism) in a single new scientific and practical direction – inclusive tourism.

4. The subject-object essence of inclusive tourism as a new scientific and practical direction in the socio-economic system of regional development of Ukraine, as a scientific category and as a modern form of rehabilitation process organization. Clarified the role and meaning of the rehabilitation process as part of inclusive tourism, the proposed forms of work, functions of tourist services and other methodological aspects concretize rehabilitation assistance as one of the main forms of tourist services.

5. A comprehensive analysis of the theories of regional development allowed to summarize the tools to stimulate socio-economic development of regions according to the following criteria: administrative, economic (production, market, financial), social. It has been revealed that the existing scientific base allows to form an idea of socio-economic development of the regions and its scientific tools, but at the same time there is virtually no mechanism of theoretical and methodological foundations for the development and implementation of inclusive tourism in the socio-economic system of the regions of Ukraine taking into account its multifunctionality.

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