

EUROPEAN TOURISM CLUSTERS: DIRECTIONS FOR RESTORING THE COMPETITIVENESS OF UKRAINIAN TOURISM

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Introduction. The post-war development of Ukraine involves the restoration of those sectors of the economy that, in the course of their own development, stimulate the growth of other sectors. Tourism is the most effective in this regard, as the development, creation and sale of a tourism product requires the involvement of about sixty types of economic activity. Moreover, the level of tourism development in a country is a certain indicator of economic development and investment attractiveness. Tourism contributes to the country's integration into the international space. As of June 2022, the direct and total indirect losses of Ukraine's tourism industry were estimated at 95.8 billion USD and 126.8 billion USD, respectively. The total need to restore the industry at that time was estimated at 165.1 billion USD [1]. Experts estimate that in 2022, the state budget lost about 30% of its tourism revenues: the number of foreign visits decreased by 50%, from 4 million in 2021 to 2 million in 2022 [2]. Inbound and domestic tourism fell by 80% and 50% respectively in 2022.

In fact, since the beginning of the Russia's invasion, Ukrainian tourism has been suspended in 13 out of 24 regions of Ukraine. In such circumstances, the resumption of tourism in the country is a positive indicator and can be seen as evidence of the country's significant competitive potential in this industry and the country as a whole. Ukraine has managed to restore tourism after the events of 2014 (Russia's annexation of Crimea and occupation of parts of Luhansk and Donetsk oblasts) and become a competitive destination in the international tourism market. Thus, Ukraine is not represented in the TTCI report for 2015 (the TTCI index is an indicator of the tourism competitiveness of countries in terms of parameters that ensure the sustainable development of the travel and tourism sector). At the same time, the tourism competitiveness index of Ukraine in the subsequent reports of 2017 and 2019 had indicators of 3.5 and 3.7, respectively, which indicates a gradual recovery of tourism.

According to UNWTO statistics, in 2016, foreign arrivals to Ukraine increased by 7% compared to 2015 and totalled 13.3 million tourists, which allowed Ukraine to enter the top 30 most attractive tourist destinations in the world, ahead of countries such as the Czech Republic, Turkey, Greece, Portugal, Ireland and Switzerland [2]. In 2019, inbound tourist arrivals decreased by 4.4% compared to 2018 and totalled 13.6 million tourists, while the geography of arrivals expanded. The number of foreign tourists visiting Ukraine increased by 26.3% in 2021 compared to the previous year. In particular, according to the British consulting company Ernst & Young in Ukraine, the average occupancy rate of high-end hotels in Ukraine in 2021 increased by 20% compared to 2020 and reached 40% [3]. In 2022, despite Russia's full-scale invasion of Ukraine, tourism continued to operate. Thus, the amount of tourist tax for the first four months of the war exceeded the same figure for 2021 by 65% [4]. Thus, Ukraine was able to adapt pre-war tourism development strategies and ensure the functioning of the industry in times of war.

The effectiveness of the tourism development strategy is confirmed by the recognition of Ukraine as an equal partner at the international level. Thus, on June 1, 2023, Ukraine was unanimously elected as the Chair of the European Commission of the United Nations World Tourism Organisation (UNWTO). At the 69th meeting of the UNWTO European Commission, Ukraine presented a programme for the development of tourism in the region for 2024–2025. As a result of the Russian-Ukrainian war, Europe is losing its competitive position in the global tourism market due to the possible loss of three of the six major tourism markets [5].

The war in Europe has forced tourists to look for holiday alternatives in other regions of the world. For example, 49% of tourists from China do not consider the European region as a tourist destination due to the danger, while visitors from Canada, Japan and the US have significantly reduced their presence. The unstable political situation in the region has a negative impact on tourism development. The number of air traffic in Europe decreased by 23% over the week, and transatlantic flights by 13% [6]. In these circumstances, Europe has stepped up funding for projects that promote the development of the tourism business in times of crisis. For example, back in 2020, the European Union launched a 2.018 trillion EUR project that provides long-term financing in 2021–2027 under the Multiannual Financing Programme and the EU's Next Generation Programme [7].

In September 2022, 30 Euroclusters were launched to implement the EU Industrial Strategy, funded by the 42 million EUR Single Market Programme. This programme covers 23 countries, including 22 EU Member States and all 14 industrial systems. Euroclusters are defined as interdisciplinary and trans-European strategic initiatives of industry clusters and other business entities [7]. Clusters in tourism are also an effective tool for promoting the economic development of the region by accumulating the resources of the participants in such a formation.

Ukraine has demonstrated a high level of adaptation to the crisis. The ability to maintain and increase its tourism potential in times of war demonstrates its high level of competitiveness. As the European region loses its position in the international tourism market, it is advisable to form tourism clusters in which Ukraine is a member. This approach will allow implementing flexible strategies for the development of European tourism and will help restore competitive positions in the modern global tourism market.

Analysis of recent research and publications. The issue of tourism development in countries that have experienced military conflicts and whose experience in restoring the tourism industry can be used by Ukraine is the subject of many publications. In particular, David M. Currie, Marinko and Jasmina Loncar, analysing the effects of the war on the development of the tourism industry in Croatia in 1991–1995, note that the tourism industry suffered significant losses not only due to the conduct of hostilities in the country, but also due to the loss of foreign markets [8].

Zeid A. Kassouha investigates the changes in the tourist heritage that occurred as a result of the military conflict in Bosnia and Herzegovina in 1992–1995 [9]. The author identifies the tendency to form specific types of tourism (dark tourism, war tourism) as a consequence of war. Shaul Krakower studies the recovery of tourism in Israel after military conflicts. According to the results of the scientist's observations, there is a sharp increase in the level of visits to the country after military conflicts, both for pilgrimage purposes and to support the people of Israel [10]. The consequences of the 1975–1991 civil war in Lebanon were studied by Said M. Ladki & Abdallah Dah [11]. The problem of tourism development in post-war Europe from 1945 to 1989 is considered by Janina Gosseye and Hilde Heinen [12].

Aristeidis Samitas, Dimitrios Asteriou et al. analysed statistical data (tourist arrivals) for the period 1977–2012 and determined that there is a negative causal relationship between terrorism and the number of tourist arrivals to Greece [13].

The war in Ukraine is still ongoing, so Ukrainian scientists are analysing the consequences of the war for the tourism industry in the face of uncertainty, considering potentially promising areas of tourism development. For example, Andrii Motsa, Serhii Shevchuk, and Nataliia Sereda consider such promising areas of post-war tourism development as educational, scientific, business, medical, military, and green tourism, focusing on using the experience of other countries to overcome the crisis [14].

Evelina Sira, Iryna Holubets and Yurii Bezruchenkov see the development of Ukrainian tourism after the war through close international cooperation [15]. A significant number of Ukrainian researchers consider the restoration of tourism infrastructure after the war through Ukraine's European integration policy [16; 17]. Nataliia Pohuda and Olena Stryzhak focus on the negative impact of the Russian-Ukrainian war on global tourism, which requires the participation of leading international travel companies in the restoration of tourism in Ukraine [18]. According to experts, due to the war in Ukraine, the recovery of tourism in the world will be uneven due to pent-up demand and changes in consumer needs as a result of the war [19]. Changes in consumer needs in tourism lead to changes in the system of organising tourism services to create a competitive product. International experience shows that clusters are one of the most effective forms of organising the development and sale of tourism services.

A number of researchers believe that tourism clusters are an important component of the economic development of a region. For example, Tarik Yalçınkaya and Tülay Güzel believe that tourism clusters effectively

contribute to the formation of a competitive tourism product [20]. Ukrainian scientists Vasyl Kifeyak and Oleksandr Kifeyak propose to use a cluster approach to the development of tourist destinations, using the experience of Poland and Romania [21]. The formation of transnational event tourism clusters for Ukraine's entry into international tourism markets is presented in [22], Oleksandra Kriven defines recreational and tourism cluster formation as an effective tool for implementing state policy in the field of recreation [23], and clustering as a direction of tourism development in the region [24]. At the same time, the problem of forming tourism clusters in which Ukraine can participate in the current environment is not sufficiently covered.

Objectives of the article. Identify potential tourism clusters in the European region in which Ukraine can participate under current conditions and develop proposals for further international tourism cooperation.

The main material of the study. The issue of tourism cluster formation has been discussed for a long time. The modern concept of cluster formation is associated with the research of M. Porter [25], who defined clusters as an effective formation for combining the resources of a certain territory. The digitalisation of the economy has led to business transformation, which, in turn, has made it possible to form clusters that are united not only on a territorial basis.

In addition to traditional cluster formations (local, national, regional, international), transnational, cross-border and global clusters are considered. The development of innovative technologies has led to a combined principle of service delivery and contributed to the formation of a fundamentally new type of cluster: the virtual-territorial tourism cluster (VTTC). A virtual-territorial tourism cluster is a cluster within which cooperation is carried out on the territories of different states using the resources of the territorial and virtual space of service provision [23]. Thus, Ukraine can be a full-fledged member of such a cluster even in times of war.

The study was based on the data from the reports on the tourism competitiveness of countries for 12 years (TTCI – Travel and Tourism Competitiveness Index – 2008–2019). In 2021, TTCI was transformed into the Travel and Tourism Development Index (TTDI) [26; 27]. Given the change in the methodology for calculating the index in 2021 and the exclusion of Ukraine from this report due to the Russia's military invasion, the data from the latest report was not included in the analysis.

Tourism competitiveness reports are published every two years. Information from the reports is the basis for making strategic decisions on tourism development at the global and regional levels. Assessing a country's competitiveness in tourism can serve as an indicator for making investment decisions. The overall TTCI index consists of 4 sub-indices: Enabling Environment (includes 5 parameters), Science and Technology Policy and Enabling Environment (includes 4 parameters), Infrastructure (includes 3 parameters), and Natural and Cultural Resources (includes 2 parameters) [26; 27]. The TTCI indicators are an aggregate measure of the implementation of the tourism development strategy in a particular country over a certain period. The study uses TTCI scores for 2008–2019 for 38 countries in the European region (Table 1):

The cluster analysis method was used to group the countries of the European region. An effective method for determining the distance between groups is the Ward method. The Ward method allows to obtain clusters of approximately the same size, which have the shape of hyperspheres and correspond to the quality of clustering. The results are presented in the form of clusters using the Statistica 10.0 software package (Figure 1).

Based on the results of the cluster analysis, 5 clusters were identified. The groups of countries formed in the course of the cluster analysis are presented in Table 2:

The analysis shows that Ukraine may be in the same cluster as the following countries: Albania, Bosnia and Herzegovina, Moldova and Serbia (cluster 5). Each of these countries has experience in implementing cluster policies in the tourism sector. Within the framework of the National Tourism Development Strategy, there are three clusters in Albania: the resort cluster "Coastal Albania", the cultural and historical cluster "Northern Albania" and the natural cluster "Albanian Alps" [28; 29]. The "Coastal Albania" resort cluster is building new hotels and resort facilities, as well as developing infrastructure for water sports and recreation. The Northern Albania cluster is engaged in restoration work on historical and cultural sites and the development of tourism infrastructure.

"The Albanian Alps Nature Cluster", focused on creating new routes for mountaineering, mountain tourism and trekking. Bosnia and Herzegovina is a member of the Balkan Tourism Cluster [30]. Serbia and Moldova are represented in the "South-Eastern European Tourism Cluster" [31], of which Ukraine is a member. Ukraine is already integrated into European tourism clusters. At the same time, in the current conditions, it is advisable to organise cooperation in the field of tourism through the formation of virtual-territorial tourism clusters with the countries represented. This approach is appropriate for the following reasons:

Table 1

Countries of the European region

Country 1	Legend 2	Country 1	Legend 2
Albania	C_1	Lithuania	C_20
Austria	C_2	Luxembourg	C_21
Belgium	C_3	Malta	C_22
Bosnia and Herzegovina	C_4	Moldova	C_23
Bulgaria	C_5	Montenegro	C_24
Croatia	C_6	the Netherlands	C_25
Cyprus	C_7	Norway	C_26
Czech Republic	C_8	Poland	C_27
Denmark	C_9	Portugal	C_28
Estonia	C_10	Romania	C_29
Finland	C_11	Serbia	C_30
France	C_12	Slovakia	C_31
Germany	C_13	Slovenia	C_32
Greece	C_14	Spain	C_33
Hungary	C_15	Sweden	C_34
Iceland	C_16	Switzerland	C_35
Ireland	C_17	Turkey	C_36
Italy	C_18	Ukraine	C_37
Latvia	C_19	United Kingdom	C_38

Source: compiled by the author

- Impossibility of full use of Ukraine's territorial resources during the war;
- the digitalisation of the economy has led to the emergence of hybrid tourism products (traditional plus virtual tourism).

Ukraine is a powerful technology hub. Thus, Ukraine ranks first in terms of exports of IT services in the European region [32]. Ukraine is represented in the Global Outsourcing 100 list, with more than 110 R&D centres of leading international companies located in Ukraine. Even in the midst of war, the IT sector contin-

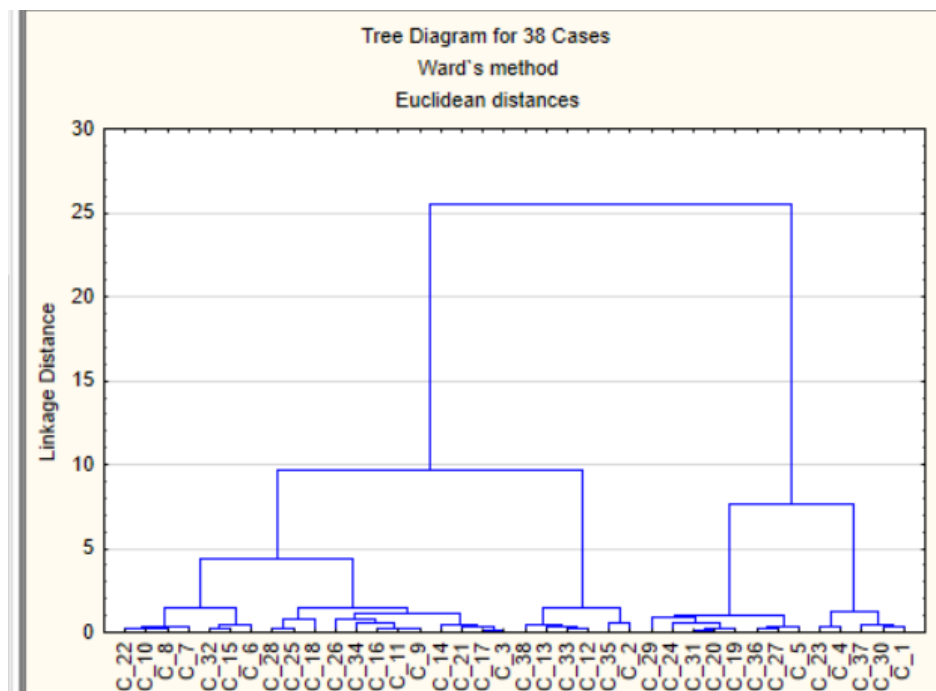


Figure 1. Results of clustering the countries of the European region

Source: complied according to the TTCI 2007–20019 [30]

Groups of countries based on the results of cluster analysis

1 cluster	2 cluster	3 cluster	4 cluster	5 cluster
Croatia Cyprus Czech Republic Estonia Hungary Malta Slovenia	Belgium Denmark Finland Greece Iceland Ireland Italy Luxembourg the Netherlands Norway Portugal Sweden	Austria France Germany Switzerland United Kingdom	Bulgaria Latvia Lithuania Montenegro Poland Romania Slovenia Turkey	Albania Bosnia and Herzegovina Moldova Serbia Ukraine

Source: compiled by the author

ues to grow: in 2022, exports of IT services reached 7.34 billion USD, which is 400 million USD more than in 2021. This is an increase of 400 million USD compared to 2021. In particular, about 55% of IT companies were able to adapt to work in the war by switching to varying degrees of remote work; 26% moved mainly within Ukraine; 19% moved entirely within Ukraine. Thus, Ukraine is a potentially attractive member of the European tourism cluster. The formation of a virtual-territorial tourism cluster in Europe, of which Ukraine is a member, will help restore the region's competitive position in the international tourism market.

Conclusions. The study showed that the nature of tourist demand changes as a result of war and a specific tourist heritage is formed in the territory of hostilities. The experience of countries that have survived war shows a tendency for a sharp increase in tourist demand after the end of the conflict. The purpose of such trips is to support the country's residents and pilgrimage. The results of the observations showed a high competitive level of Ukraine in the tourism industry, its ability to maintain and increase its tourism potential even in times of war. Given the digitalisation of the economy, the high level of development of the Ukrainian IT sector and Ukraine's integration into the European tourism space, it is a relevant player in the tourism market. Based on the results of the clustering, a group of countries was identified that form clusters in the European region, including Ukraine.

Given the results obtained, it can be concluded that it is advisable to form virtual-territorial tourism clusters in Europe, in which Ukraine can participate even in times of war. The advantages of this approach are the possibility of using the territorial and virtual resources of the cluster members, which will restore the competitive position of the European region in the international tourism market.

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Kateryna Vovk, Doctor of Philosophy in Tourism, Lecturer, Simon Kuznets Kharkiv National University of Economics. **European tourism clusters: directions for restoring the competitiveness of Ukrainian tourism.**

The article examines the state of tourism development in Ukraine during the war. It considers the experience of countries that survived the war. It is determined that the purpose of such trips is to support the country's residents and pilgrimages. The consequences of the military conflict are a change in the tourist heritage and an increase in demand for black and military tourism products. The clustering of the countries of the European region was carried out using the TTCI indicators for 2007–2019 in order to identify a potential cluster for Ukraine. The results of the cluster analysis showed the existence of five tourism clusters. A potential European tourism cluster, of which Ukraine could be a member, has been identified. The formation of European virtual-territorial tourism clusters is proposed. This approach will allow developing competitive tourist offers covering the maximum segment of consumers in the world.

Key words: competitive, tourist cluster of the virtual territory, tourism development.

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Вовк Катерина Михайлівна, доктор філософії з туризму, викладач, Харківський національний економічний університет імені Семена Кузнеця. **Європейські туристичні кластери: шляхи відновлення конкурентоздатності українського туризму.**

Досліджено стан розвитку туризму в Україні під час війни. Визначено здатність українського туризму до збереження та нарощування туристичного потенціалу в кризових умовах. Розглянуто досвід країн, що пережили війну, визначено різке зростання туристичного попиту до них після закінчення конфлікту. Метою таких подорожей є підтримка мешканців країни та паломництва. Досвід країн, що пережили війну, показав зміну туристичної спадщини і зростання кількості споживачів, які потребують продуктів чорного та воєнного туризму. Акцентовано увагу на негативному впливі російсько-української війни на розвиток туризму в країнах Європейського регіону. З'ясовано, що Європа потенційно може втратити три з шести туристичних ринків і різке зниження міжнародного туристичного попиту в регіоні з-за високого рівня небезпеки. Визначено, що в Європейському регіоні посилюються заходи стимулювання туристичного бізнесу через утворення кластерів. Зокрема, реалізовується стратегія щодо формування Європейських туристичних кластерів, учасником яких може бути країна з іншого регіону. Проекти стимулювання туристичного бізнесу Європа почала впроваджувати ще у 2020 році з метою максимального нівелювання наслідків COVID-19. Здійснено кластеризацію країн Європейського регіону. Результати кластерного аналізу показали наявність п'яти туристичних кластерів. Визначено потенційний Європейський туристичний кластер учасником якого може бути Україна. З метою відновлення конкурентних позицій Європи на міжнародному туристичному ринку запропоновано формування віртуально-територіальних туристичних кластерів за участю України. Формування зазначених кластерів дозволить максимально використовувати віртуальний простір України та територіальні ресурси Європейських країн навіть в умовах війни. Наголошено увагу на доцільності формування туристичних кластерів за віртуально-територіальним принципом з-за процесів цифровізації економіки, що обумовлює появу туристичних продуктів гібридного формату (традиційний плюс віртуальний туризм). Такий підхід дозволить розробити конкурентні туристичні пропозиції з охопленням максимального сегменту споживачів у світі.

Ключові слова: конкурентоспроможність, віртуально-територіальний туристичний кластер, міжнародне співробітництво.