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## **ASSESSMENT OF COMPETITIVENESS OF TOURIST CLUSTER OF ZAPORIZHZHIA REGION**

### ***Summary***

*The emergence in the theory and practice of tourism management of new concepts display the process of development of society, the emergence of new research objects and the relationship between them, as well as the accumulation of scientific knowledge. One of these concepts, which have recently become more and more a part of the scientific circulation in the regional economy and economic geography, was the concept of the cluster as a special form of territorial organization (self-organization) of production in a market economy. For the first time, it was used by the American economist, professor of Harvard Business School M. Porter (1990) to identify the community of geographically focused interconnected firms and organizations that complement and enhance each other's competitive advantage. The cluster is formed by a special innovation environment; it contributes to the competitiveness of firms, which are a part of it and the prosperity of the region. The application of the cluster approach is a prerequisite for the revival of domestic production of services and organizations to improve the efficiency of the innovative development of enterprises, achieving their high level of economic development and competitiveness. The ultimate goal is to occupy a worthy place by domestic economic agents in the world system of economic development.*

### **Introduction**

The cluster associations allow realizing the most important interconnections in the technology, marketing, and consumer inquiries, which are inherent in a whole range of firms and industries. These relationships have a decisive impact on the competitiveness of the final product, as well as the direction and pace of innovation. It is no coincidence, the researches of recent years confirm that the

greatest probability of emergence of innovations appears precisely in the cluster associations, the creation of which enables operatively to solve important national economic problems, improves general indicators of economic activity of enterprises and institutions, reduces the level of conflict between sectors of the economy, improves their interaction, stimulates the activities of enterprises to increase the authority of production [3].

When joining a cluster, the participants usually solve the following tasks: increase sales, profits and market share, reduce production costs, distribute and sell products, and consequently strengthen their competitive position in the market, ensure efficiency and stability of operation.

So, according to UNWTO, the tourism development is defined until 2030. This long-term outlook was based on the data from the 1990s and the current work in two decades – from 2010 to 2030.

The updated outlook was enriched by an analysis of the social, political, economic, environmental, and technological factors, which have created tourism in the past and which are expected to affect this sector in the future.

According to the tourism, by 2030, the tourists, who travel around the world, are expected to increase by 3.3% per year in the period from 2010 to 2030. Over time, the growth will slowly slow down: from 3.8% at the beginning of the period to 2.9% in 2030. In absolute figures, international tourist flows will increase by about 43 million per year, compared with the average, increasing of 28 million, in the period from 1995 to 2010.

According to the outlook, the growth of international tourist flows by 2020 will reach 1.4 billion people and 1.8 billion people by 2030 [4].

In the works of M. Porter, D. Kelleher, A. Habiby, N. Pierse [1], the general theoretical approaches to the existence and creation of competitive advantages of cluster systems in countries with a stable market economy are considered. Gudz P.V. considers the mechanism of action of the cluster as a quasi-corporation, on the basis of which the model is based on the management of the region [8]. Vasilenko V.M. considers the development of a regional economy based on a cluster system as a basis for the harmonization of the regional economic space [9]. An assessment of the conditions for the creation of a cluster mechanism for the integration of enterprises in the Zaporizhzhia region has been investigated in the works of Pulina T.V. [10].

In the opinion of scientists, a cluster system for ensuring competitiveness requires a well-developed marketing mix, all elements of which are accompanied by careful analytical processing, which allows to react promptly to changes in the micro/macro environment and to increase the market share of the cluster association.

However, according to the experts, the resource potential of tourism is not yet exhausted, compared to the resource potential of trade and other rapidly developing activities in Ukraine. It must be admitted that tourism can take a leading position in the Ukrainian business.

The aim of the research is to assess the competitiveness of the tourist cluster of the Zaporizhzhia region by means of a system of determinants of the competitive

advantage of the countries, is called “competitive diamond” (or “diamond”), taking into account the number of major groups. Achieving the goal will create a tourist cluster, which will use the resources available in the territory or the country to accelerate the growth and strengthen the competitive position of the Zaporizhzhia region and thereby provide the basis for an extremely competitive success in the tourism industry.

### Part 1. Conditions for the formation of tourism clusters

It should be noted that the achievement of significant paces of economic development and high level of competitiveness by domestic enterprises requires the development of intensive local competition, which emphasizes the need to shift the emphasis in the research to the local level. M. Porter [1, 220] notes that the success of firms in rivalry with competitors is largely determined by the state of the economic environment, which is characterized by four interrelated functional forces, which are represented graphically in the form of a diamond (Fig. 1). In addition, the competitive advantages are influenced by three independent determinants: the government, event (for example, war, fire) and international business activity [11, 581].

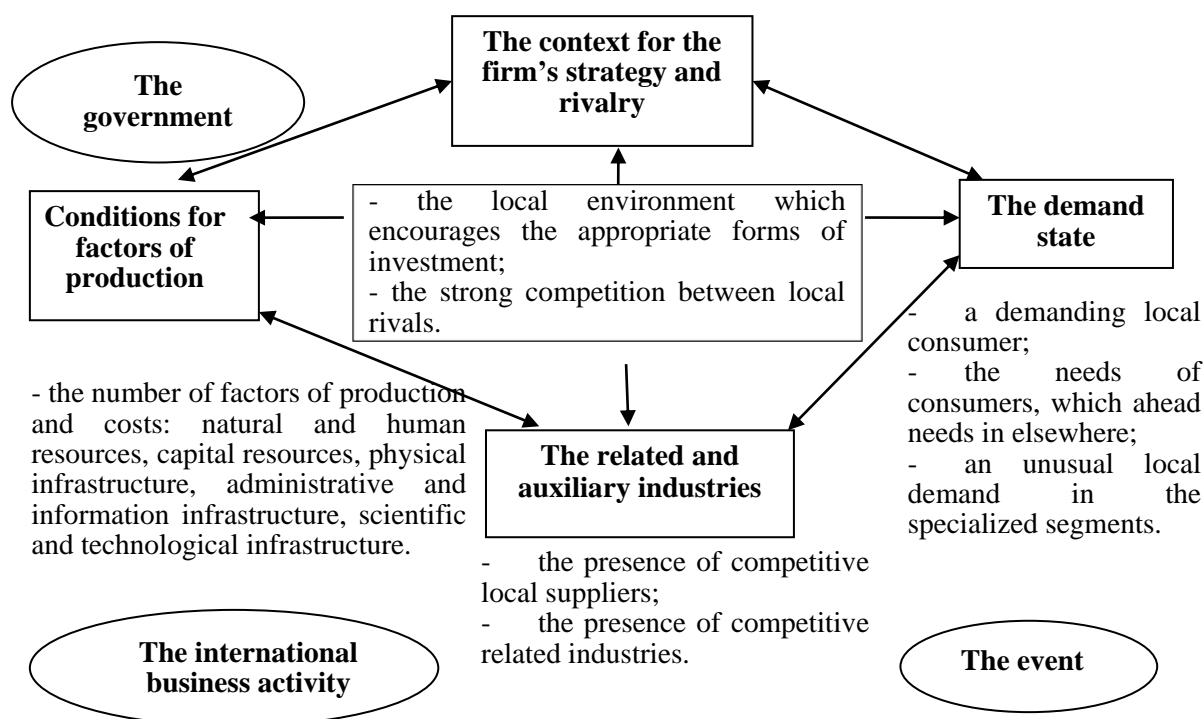


Fig. 1. Diamond of Porter

The intensive development is achieved when all the components of the diamond cooperate with each other in the priority sectors for the economy, which promotes the creation of new factors of production, the development of related and supporting enterprises, the creation of new enterprises, strengthening the positions and accelerating the pace of development of existing ones. It is precisely the

clusters are best viewed as a manifestation of integration and interaction between all four facets. The cluster associations influence competitive behaviour in three ways: firstly, by increasing the sub-activity of firms and industries that are a part of them; secondly, by increasing their ability to innovate and increase productivity; and thirdly, by stimulating new businesses which support the innovation and expand the cluster's boundaries.

So, it is emphasized by M. Porter [1, 221], a cluster can be defined as a system of interconnected firms and organizations, the significance of which as a whole exceeds the mere sum of components.

Consequently, the competitive advantages of individual cluster associations provide a high level of national competitiveness.

It should be noted that the links of the participants within the cluster are of a long-term nature, the clusterization reduces the isolation of individual enterprises, and in addition, long-term contacts can provide all participants with greater benefit from joint activities, in contrast to interconnected relationships. In this case, the cluster associations of enterprises are often informal structures [Sokolenko, 2004: 89] or differ in the level of interaction between companies: from the free relations in the association to structured cooperation and competition [13, 60]. It is noted that they do not have a special legal form; in addition, for the cluster entities, there is no compulsory registration system, which creates difficulties in identifying clusters. However, as S. Sokolenko notes [12, 170], the company's operation in the cluster is, above all, a function of geographical location and relationship, rather than registered membership.

Often in the cluster association, all strategic decisions are made by the cluster council (the highest non-governmental public body), which includes representatives of all organizations – members of the cluster.

At the same time, the relations in the cluster are necessarily contractual on a mutually beneficial basis.

The rules of cooperation, mutual participation in the project, strategic directions of activity in the cluster are by no means established from above, but it should be collectively made with the participation of all enterprises and institutions of the cluster in the long-term perspective.

There is a hope that such a cluster enterprise and institution management structure is more effective than relationships based on the domination of one or more of the partners. This is confirmed by Z. Cairo [14, 199], arguing that a structure with an even distribution of control has a longer chance of survival than the majority owned enterprises, because the unequal division of ownership gives the owner more chance of dictating the conditions. Evidence for this can also be found in E. Toffler's work [15], he argues that new institutions that use the organization's paths in less hierarchical and more independent groups will replace obsolete integration structures.

Therefore, the transition of the tourism industry of Ukraine to the cluster model of development is urgent and timely.

Taking into account the world trends of development, consider the prospects of creating a cluster in the Zaporizhzhia region.

Consequently, in the Zaporizhzhia region, there are significant preconditions and prospects for creating a tourist cluster. Therefore, it will be evaluated the competitiveness of the tourist cluster of Zaporizhzhia region. For this purpose, M. Porter's diamond of competitive advantages was used. It allowed characterizing the environment of the possibility of creating a cluster, comparing it with the conditions of competitiveness on the world market, and outlining a set of measures aimed at increasing the competitiveness of the creation of a tourist cluster in the Zaporizhzhia region with the involvement of all stakeholders (Tab. 1).

Table 1

**The analysis of the environment for creating a tourist cluster in the Zaporizhzhia region**

Conditions of competitiveness in the world tourist market	The environment of the possible creation of a tourist-recreational cluster of Zaporizhzhia region
Conditions for production factors	
Natural and climatic conditions of high comfort, unique cultural and historical resources.	Conditions meet the world's requirements – the presence of unique natural complexes, rich and diverse culture, world heritage, world-famous tourist attractions.
Accessibility for wider and/or wealthy people.	Potentially, the conditions meet the world's requirements – the presence of a well-developed system of international transport.
A convenient approach to objects of tourist interest, developed communication systems and financial infrastructure.	Conditions do not meet the world's requirements. An undeveloped network of roads and their unsatisfactory condition, which complicates access to tourist attractions. Bad communications outside large urban areas. Sophisticated Financial Instructions.
Demand condition	
Study of tourist demand.	There is a need to create a system of continuous market study, collection, processing, and analysis of statistical information.
Focus on certain groups of consumers.	Lack of a focused approach to combined tourist products and clarity in understanding the target segments.
Accounting for changing consumer preferences in the market.	In the Zaporizhzhia region, tourism is mainly developed for leisure and entertainment purposes. However, the European market for recreational travel, generating broad tourist flows in Ukraine, has reached saturation. Tourist products offered in the market should change over time under the influence of fashion, taking into account security requirements and based on knowledge in the field of marketing and advertising.

Information support for tourists at the place of staying.	There is a need to create an information system for tourism.
Sustainable strategy, structure, and competition	
Intense competition between service companies leading to: – the growth of the number of firms professionally functioning in the market; – in-depth market segmentation; – improving the quality of service.	The degree of the intensity of the competitive struggle varies depending on the market for tourist products. It is practically absent among a few large hotels of the category of five “stars” or car rental companies. A high degree of competition is noted between accommodation facilities working under the scheme of the B&B (bed and breakfast, “accommodation with breakfast”) tour operator sector. The limited entry of new firms into the markets for hotel services, car rental, transportation and entertainment is due to the slow growth in the quality of services.
Related and supporting industries	
Presence of a critical mass of enterprises of related and supporting industries.	Prices for hotel services become significantly higher. The number of guest houses, accommodation facilities operating under the Bed & Breakfast scheme and catering facilities is rapidly increasing. There are new resorts, for which the training of personnel is of particular importance. As a result of deregulation of air transport, the prices for an air travel are decreased. The competition among travel agencies is increasing.
Excellent basic services and infrastructure.	Tourism in the Zaporizhzhia region, as a whole in Ukraine, has an elitist character and is designed for high-income groups of the population. At the same time, the service of even the highest quality according to local standards does not meet international standards.
Ease of movement across the country.	Low quality of transport services.

*Source: calculated by the authors according to the data [16]*

However, the clusters are formed and functioned on the principles of public-private partnership. The government plays an important role in the formation of the tourist cluster and its development, especially at the initial stage, but it does so in a close, moreover, a strategic alliance with tourist business. The government helps the development of cluster initiatives on the ground by creating a platform for dialogue between the various cluster actors, improving the skills of the local labour force through the implementation of programs for additional education and retraining, creating a brand for the region to attract foreign visitors, and others.

### Part 1. Assessment of competitiveness of tourist cluster of Zaporizhzhia region

At the next stage of assessing the competitiveness of the tourism industry in Ukraine, will determine the relationship between Ukraine and the Zaporizhzhia region on the basis of the main indicators of tourism development for the period from 2011 to 2017, focusing on the cost indicators of the realized trips by tour operators and tour agents, GDP, GRP, population (Tab. 2).

Table 2

#### The main indicators of the development of the tourism industry in Ukraine and Zaporizhzhia region

Years	Zaporizhzhia region	Ukraine	% correlation
1	2	3	4
The cost of tickets sold by tour operators of Ukraine/region legal entities and individuals, thousand UAH, including:			
2011	4	7745074,7	2,14
2012	172258,3	8370312,0	2,06
2013	441947,7	11589179,0	3,81
2014	248750,2	11157729,5	2,23
2015	264616,5	15355112,5	1,72
2016	241267,3	24619310,9	0,98
2017	302044,5	23202923,2	1,3
The cost of tickets sold by tour operators of Ukraine/region legal entities and individuals, thousand UAH, including:			
2011	33766,7	5005375,0	0,67
2012	32705,6	8515107,7	0,38
2013	29212,4	10465782,1	0,28
2014	31078,6	12449408,6	0,25
2015	10285,2	10329747,6	0,10
2016	9821,0	19755812,7	0,05
2017	5650,4	18234911,1	0,03
The cost of tickets sold by tour operators of Ukraine/region legal entities and individuals, thousand UAH, including:			
2011	131730,7	2739699,7	4,81
2012	139552,7	2976098,8	4,69
2013	229083,1	4270354,0	5,36
2014	217671,6	3705575,0	5,87
2015	254331,3	8596669,9	2,96
2016	231446,3	4863498,2	4,76
2017	291446,3	4968012,1	5,97

1	2	3	4
GDP/GRP (at current prices), million UAH			
2011	49525	1299991	3,8
2012	54828	1404669	3,9
2013	54352	1465198	3,7
2014	65968	1586915	4,16
2015	89061	1988544	4,48
2016	104323	2385367	3,73
Permanent population of Ukraine/region (in the end of year), million people			
2011	1801,3	45778,5	3,93
2012	1791,7	45633,6	3,93
2013	1785,2	45553	3,92
2014	1775,8	45426,2	3,91
2015	1765,9	42929,3	4,11
2016	1746,9	42760,5	4,08
2017	1721,04	42584,5	4,04

*Source: calculated by the authors according to the data [18]*

According to the results of the analysis, we observe a clear tendency to reduce the cost of the completed tours as the tour operators and travel agents. Also, GDP and GRP decrease in comparison with 2011/2016 by 1.4%.

An important argument for entry tourism was the rapid decrease of hryvnia and the growth, respectively, of the exchange rate. Positive for foreign visitors are stable prices, which continue to remain low, despite their growth [19].

Also, the number of visitors is affected by the difficult political situation in the east. The safety of travel is an important thing. But the understanding that the conflict in the Donbas is local already prevails.

Crimea remains an important problem for tour operators. The loss of the peninsula is a negative consequence since Crimea was an integral part of the programs of several days of tours.

Another factor influencing sales was the fact that a significant number of rounds were combined – in Ukraine and Russia. Now such a combination seems inappropriate. The security and stability are not only problems of the Ukrainian tourism industry. Many markets are rapidly losing tourists because of the volatility of the situation [19].

From the analysis, it can be concluded that there are no competitive and mature tourist clusters in Ukraine yet. Potential are tourist clusters “Southern Tourist Ring”, “Lviv-tourcluster”. Over time, with the development and implementation of relevant projects for the creation of tourist clusters, the clusters in Kyiv, Chernihiv, Zakarpattia regions will become potential.

The strategic tourist clusters, which are called to play an essential role in the economic development of the respective territories, are the tourist cluster of historic small cities of Western Ukraine, cluster of agro-ecotourism “Oberih” (Khmelnyskyi region), as well as those will be created in the field of rural green tourism on the whole territory of Ukraine (in the countryside).

The stabilization group includes the tourist cluster in Myrhorod; it is created to diversify the economic activity in the region.

As the world experience shows, the most tourist clusters establish and constantly strengthen various connections with other clusters. Their closest links are with food clusters, media clusters, and sewing and automotive clusters. For example, tourist clusters Lake Trasimeno (Italy) and California have close links with wine clusters, and a tourist cluster of cities in the Northwest of Russia – with a sewing cluster (links to the supply of linen, napkins, and other sewing products for hotels).

In Ukraine, the links of the tourist cluster “South Tourist Ring” with the food cluster, and the potential tourist cluster in Ivano-Frankivsk region with the cluster “Skiing and Other Artistic Industries” are promising.

At the same time, some types of tourism activity are only a part of other clusters. For example, in the Austrian IT clusters, along with the production of electronics, software, multimedia, the country’s tourist legacy (clusters Vienna, Linz, Graz, Salzburg, Innsbruck) is being advertised. The hotel economy is a part of the clusters “Real Estate, Hotels, Offices, Construction of Wooden Buildings” (“Voralberg”, “Feldkierch”).

So, the interdependence of members of the tourist cluster is manifested in the fact that the effective work of each of them creates preconditions for the success of other participants. As a result, all companies of the tourist cluster benefit from joint efforts in the form of a wider range of opportunities and increased profits. In the tourist cluster, under the established interaction, conditions are created favourable for the production of new types of services, thus creating an innovative and business competitive environment.

In general, the further development of tourist clusters of different types in Ukraine needs the government support.

### **Part 3. Grounds for the creation of a cluster of the tourism industry in Zaporizhzhia region**

In Ukraine, the regulations governing the establishment and functioning of clusters are actually two documents: “Draft National Strategy Concept of Formation and Development of Transboundary Clusters”, approved by a decision of the Ministry of Regional Development and Construction of Ukraine of 17.09.2009, No. 46, and The Resolution Presidium of the National Academy of Sciences of Ukraine “On Formation and Functioning of Innovative Clusters in Ukraine” of 08.07.2009, No. 220.

In the near future, for the development of the tourism industry in Zaporizhzhia region, it is necessary to implement the following measures:

- to use all media in all possible directions of tourism and recreation support;

- to ensure the production of quality informational materials;
- to establish training of both tour operators and travel agency employees in the specific work in the field, including the study of foreign languages, as well as effective interaction among all members of the cluster;
- to organize a well-prepared promotional tour to promote a positive impression on tourists host country, practice invitation employees travel overseas agencies for networking and exchange of experience in this field.

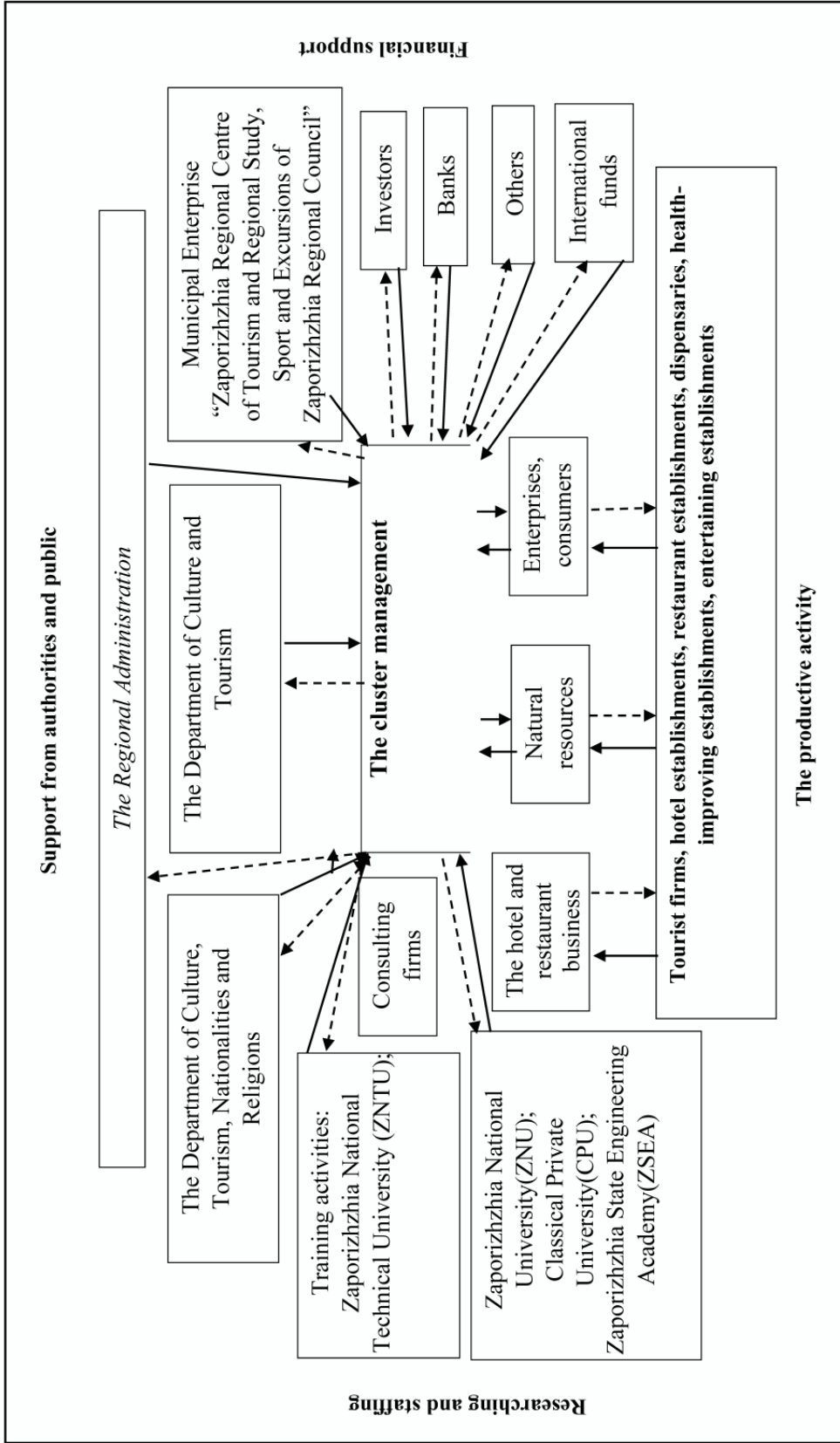
The formation of promising tourist clusters becomes the basis of sustainable regional development and, as a rule, is an impetus for improving the infrastructure and economic activity of the region. The structure of the cluster on the basis of the tourist industry of Zaporizhzhia region is given in Fig. 2.

In the long term, all elements of the tourist and recreational infrastructure should be developed to promote the protection and rational use of nature reserves and nature-recreational territories should be developed.

In particular, the inter-regional and interstate communications establish to provide health, recreation, and tourism services to residents of other regions and countries, tourists interchange, exchange of experience and more. Development of the tourist and recreational sphere of the region will contribute to an increase in revenues to the budgets of all levels, increasing the level of preservation of the historical and cultural heritage and service of the population.

From the data analysis it follows that in the Zaporizhzhia region, the objective preconditions for the implementation of the cluster approach based on the tourism industry are formed, in particular:

- create an effective mechanism for interaction between local authorities, leaders and participants of the cluster based on the tourism industry, understanding by the authorities of the need to consolidate the efforts of all active members of the community in order to fill the local budget and increase the investment attractiveness of the region;
- the existence of an institutional environment for the creation of a new type of network innovation structures. The structure of the institutional environment includes:
  - a significant number of innovative active tourism enterprises of Zaporizhzhia region;
  - availability of a network of specialized research sectors of the cluster of tourism, which can promote the cluster consolidation of enterprises by providing participants with the necessary scientific and technical information;
  - availability of specialized educational institutions for the training of the necessary personnel. The training of qualified specialists for the cluster enterprises will be provided by: Zaporizhzhia National University (ZNU); Zaporizhzhia National Technical University (ZNTU); Classic Private University (CPU), etc.
- information, market, and administrative infrastructures are developed;
- availability of significant natural resources;
- investment attractiveness of the branch on the side of domestic and foreign investors.



**Fig. 2. The structure of the cluster based on the tourist industry of Zaporizhzhia region**

*Source: developed by the authors*

Taking into account the above, the scheme of the newly created tourist cluster is recommended (Fig, 2).

The core of the tourism industry is represented by enterprises of the tourist industry, namely: travel agencies, hotel establishments; restaurant establishments, sanatoriums, health-improving establishments.

The strategic task of the cluster development on the basis of the tourist industry of the Zaporizhzhia region is the creation of an efficiently functioning industry that meets the needs of the domestic and foreign markets in the cluster products.

Considering the activities of existing cluster initiatives, the following conclusions can be done. The “Tourist Cluster” has all the formal features of a cluster structure and significant prospects for development. The cluster project “Tourist Cluster” has only two components at the time, which show its membership in the cluster structure, precisely, the presence of an association of tourist enterprises, which offer the tourist products under a single brand and the support of the project by regional authorities.

This project does not have an innovative component and links with research institutes. As a result, it is virtually impossible to create a chain of values of the cluster.

Summarizing the above, note that representatives of the business environment and government in Ukraine have some positive experience in the organizing cooperation and stimulating innovation activity through the cluster structures.

The results of the first years of the cluster functioning in Ukraine show a significant potential of this type of cooperation, however, experience shows that it is very difficult to realize the existing potential, as the development of clusters, both in the region and in the country as a whole, is interfered with a number of deterrent factors, in particular:

- the weak level of interaction between enterprises in the region, as well as lack of well-established partnership and the weak level of trust between authorities and enterprises;
- the absence of active position among scientific institutions regarding participation in the clusters;
- the lack of funds for the implementation of cluster projects;
- the lack of legislative and regulatory documents, which stimulate and regulate the cluster activity;
- the lack of large-scale government support for the process of merging enterprises into the clusters, especially at the initial stages of the cluster creation.

### **Conclusion**

The assessment of the competitiveness of tourism industry of the Zaporizhzhia region using the diamond of competitiveness of M. Porter. The model of the creation of a tourist cluster in the Zaporizhzhia region is substantiated and problems and perspectives of its development are defined.

It was clarified that application of the cluster approach for the Zaporizhzhia region provides such possibilities for preservation and strengthening of a single

economic space of the territory with the help of integrated development of innovation-oriented clusters; the maximally possible approximation of production to resources and places of consumption of finished products; even the distribution of production across the country, aimed at levelling the socio-economic development of the regions; strengthening of competitiveness and defence capabilities of the state.

Therefore, the clusters stimulate not only the growth of cluster growth poles but also the provision of enterprises, without which it is impossible to effectively develop the economy as a whole.

It is determined that the long-term strategy for the development of a tourist cluster should be based on the cooperation of government authorities with the key tourism business enterprises. The implementation of the strategy is provided by improving the legal framework of the organization of tourist clusters in Ukraine, the formation of a system of specialists' training and retraining taking into the account the needs and prospects of development of the Zaporizhzhia region, as well as the creation of a system of training and retraining of specialists for work in enterprises of tourist clusters.

Further researches should propose an improvement of the development strategy and competitiveness of the tourist cluster of Zaporizhzhia region.

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