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Надійшла до редакції 01.10.13

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ВПЛИВ ХАРАКТЕРИСТИК СОЦІАЛЬНОГО КАПІТАЛУ НА ЕФЕКТИВНІСТЬ ПІДХОДУ ДО МІСЦЕВОГО РОЗВИТКУ, ОРІЄНТОВАНОГО НА УЧАСТЬ ГРОМАД

У статті досліджується вплив характеристик соціального капіталу місцевих спільнот на ефективність підходу до економічного розвитку, орієнтованого на участь громади. На основі аналізу результатів проекту Програми розвитку ООН та Європейського Союзу "Місцевий розвиток, орієнтований на громаду" зроблено висновок про найбільшу важливість для економічного розвитку таких характеристик соціального капіталу як (анти)патерналізм, солідарність та кооперація. Висунуто гіпотезу про те, що створення організацій громади може стати дієвим механізмом, який дозволить реалізувати наявний соціальний капітал сільських громад в Україні.

Ключові слова: соціальний капітал; місцеві спільноти; соціальна мобілізація; економічний розвиток.

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ВЛИЯНИЕ ХАРАКТЕРИСТИК СОЦИАЛЬНОГО КАПИТАЛА НА ЭФФЕКТИВНОСТЬ ПОДХОДА К МЕСТНОМУ РАЗВИТИЮ, ОРИЕНТИРОВАННОМУ НА УЧАСТИЕ СООБЩЕСТВ

В статье исследуется влияние характеристик социального капитала местных сообществ на эффективность подхода к экономическому развитию, ориентированного на участие общины. На основе анализа результатов проекта Программы развития ООН и Европейского Союза "Местное развитие, ориентированное на сообщество" сделан вывод о наибольшей важности для экономического развития таких характеристик социального капитала как (анти)патернализм, солидарность и кооперація. Выдвинута гипотеза о том, что создание организаций сообществ может стать действенным механизмом, который позволит реализовать имеющийся социальный капитал сельских общин в Украине.

Ключевые слова: социальный капитал; местные сообщества; социальная мобилизация; экономическое развитие.

UDC 339.9.012.23:339.138:330:334
JEL F230, D210, L160, O310

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INTERNATIONALIZATION OF INDUSTRIAL CLUSTERS: OBJECTIVES AND PERSPECTIVES

Nowadays the actual issue is to explore the ways of international competitiveness strengthening in order to be able to compete effectively in the global market. Clusters are considered as one of the most effective ways for competitiveness enhancement, production effectiveness and companies' market performance improvement, due to synergy effects of interaction among its agents, reducing costs, cooperative decision making and ability to implement innovations productively.

Keywords: cluster; international cluster; cluster internationalization; cluster initiatives; international cluster formation.

Introduction. The creation of cluster systems is one of the most actual methods of increasing the competitive ability. Potentially all the market players are vitally interested in it. But first of all – the representatives of the so called tran-

sitional (post-socialist) economies, which receive the real possibility for fast integration into world economic system by deepening scientific, industrial and commercial cooperation with foreign partners. M. Porter's theory of the "national

diamond" creates the appropriate background for further adaptation of cluster mechanisms to the unstable and dynamic economic environment of the states in transition.

Analysis of the previous researches and publications. Many works of national and foreign scholars were dedicated to the cluster formation and cluster functioning issues. Theoretical aspects of the cluster performance were revealed in the studies of national authors, such as V. Bazylevych, E. Bezvushko, I. Brizhan, S. Bushueva, S. Varnaliy, M. Voynarenko, N. Kanishchenko, A. Kanishchenko, D. Lukyanenko, C. Moskvina, S. Mochernogo, V. Novitsky, Yuri Pavlenko, M. Petrushenko, B. Saw, K. Poychenko, A. Plotnikov, C. Rosenfeld, Y. Saveliev, V. Savchenko, V. Sizonenko, S. Sokolenko, M. Timchuk, A. Filippenko, A. Shnyrkov. The main focus of these studies is devoted to the cluster nature, the effects of cluster interactions and competitive advantages obtained by companies as a result of such interactions.

The theoretical framework of the industrial clusters formation and development was described by foreign scientists: M. Keating, M. Porter, B. Price, P. Samuelson, D. Jacobs and L. Young, E. Bergman, E. Feser, studies are devoted to the identification and evaluation of clusters, M. Enright, S. Rosenfeld – examine the theoretical foundations of industrial integration and organization of the productive forces, M. Steiner, M. Todaro, P. Fischer, M. Feldman, Schumpeter and others outlined the main principles of innovative structures formation based on practical experience. These studies mainly focus on a separate range of issues devoted to the process of clusters formation and its international performance.

There are almost no complex studies on international innovation clusters issued and its formation peculiarities, especially for transition economies. That is why there is a need for a systematic study of international innovation clusters formation issues; opportunities for transitive countries to integrate in international cluster systems identification and uncovering the economic interests of the entities from different countries in such activity. The problems of Ukrainian companies' involvement in international cluster structures are still not identified.

Results of research. Actually the sufficient empiric experience in cluster systems' development has been already accumulated. That compels scientists to analyze the essential points of this organizational and economic phenomenon. Now it is already possible to determine its basic

objectives influencing its evolution: interests, organizational simplicity, interdependence, focus on innovations, intensification of information flows, internal instability etc.

World experience demonstrates a lot of successful examples of international co-operation between enterprises, which due to a geographical or a particular branch concentration, firmness of intercommunications and receipted additional synergetic effects of collaboration can carry out more effective activity. Such cooperation provides a higher competitiveness in comparison with the separated functioning of enterprises, and positively influences on the countries' economic development.

Forming and development of such cooperative structures which can be described as international clusters depend on both the specific of country-initiator business-environment, its international relations and position in international division of labor. Cluster concept comes out as alternative to traditional sector (industry) approach, which is based on horizontal relations and competitive interdependence. Cluster approach focuses on the importance of developing the complicated vertical links between businesses and of integration of their economic interests that makes it possible to multiply the efficiency of mutual actions.

Cluster internationalization process is different from enterprise internationalization and has its own peculiarities. It is due to the fact that each group of cluster members perform different activities in the market, has various strategies, capacities, sizes and financial resources. These factors contribute to the case that not all cluster members are involved in the process of internationalization in the same degree.

On the basis of conducted analysis, we can assume that innovational cluster may include research centers or may not, and there is almost anyone studies devoted to the measurement of the innovativeness level. The innovation cluster is regarded as cluster which enables to exploit new knowledge, discoveries and inventions faster and more successively.

Thus, the innovative cluster may be determined as the cluster which implements innovations de facto. Besides, there could be various types of innovative clusters depending on relationships between the cluster members, cluster structure, different consequences of its performance, regardless of whether the main objective of such undertaking is to innovate. International clusters may be defined as foundation composed of members from different countries which compete, cooperate and complement one another simultaneously (Table 1).

Table 1. International clusters types by the structure of relationship among its members*

№	Type	Definition
1	Transborder cluster	Network of suppliers, producers and buyers that are residents of different countries geographically located in transborder region.
2	Transnational cluster	International networks of national clusters, which compete and cooperate, collaborate with transnational foundations, local and national government institutions, and international organizations in order to improve cluster performance and national competitiveness.

*Source: adapted by author on the basis [1, 2, 3].

The Table 1 shows, that transborder cluster is considered to be a network of suppliers, producers and buyers that are residents of different countries geographically located in transborder region. Transborder clusters are often characterized as formations with stable relationship among its members which have the opportunities to gain competitive advantages from cluster interactions in border territories that once more emphasis the geographical aspect of the cluster formation.

Transnational cluster is an international network of national clusters which at compete and cooperate, collaborate with transnational foundations (educational and scientific

organizations, business infrastructure), local and national government institutions, and international organizations in order to improve cluster performance and national competitiveness. Actually, transnational cluster is the association of national clusters connected with international relationship. These foundations widely exploit the advantages of joint R&D, the economy of scale and network effects to promote products to new markets.

It is possible to assume that entities from countries with different economic level of development may have various interests stimulating them to integrate into international cluster systems (Table 2).

Table 2. Entities' economic interests for associating into international innovation clusters*

Countries	Sphere		
	R&D	Production	Marketing
Developed countries interests	<ul style="list-style-type: none"> - Joint R&D - Access to the latest technology. - Technology transfer for joint research and production 	<ul style="list-style-type: none"> - Production cooperation for exploiting advantages from division of labor and specialization - Production outsourcing for cheaper recourses - Establishment production closer to consumer 	<ul style="list-style-type: none"> - Promoting products to foreign markets
Developing countries interests	<ul style="list-style-type: none"> - Access to unknown technology. - Joint R&D - (with developed and other developing countries) 	<ul style="list-style-type: none"> - Production cooperation for exploiting advantages from division of labor and specialization - Organization of production at national territories (oriented on external markets) 	<ul style="list-style-type: none"> - Joint promoting foreign products in national markets
Transition countries interests	<ul style="list-style-type: none"> - Access to unknown technology. - Joint R&D (mainly with entities from countries with similar level of economy and innovational performance development) 	<ul style="list-style-type: none"> - Production cooperation for exploiting advantages from division of labor and specialization - Organization of production at national territories (oriented on internal market) 	<ul style="list-style-type: none"> - Joint promoting foreign products in national markets - Promoting national products internationally

*Source: developed by author on the basis [4, 5].

In this case, developed countries often play role of knowledge and technology donors and developing countries together with countries in transition are recipients. Exhausting of potential or even impossibility of independent effective development aims national businesses to combine efforts for multiplying the cumulative synergetic effect of their entrepreneurial activities by cooperation on the basis of: geographic position (territorial, regional, trans-boundary, continental etc), economic goals, mode of industry etc.

Cluster internationalization has its peculiarities. Investigation of cluster internationalization factors, as noted by scholars, should be done with consideration of external and internal factors of the entity's market environment. National researcher O. Kanishchenko proposes to analyze company's international business environment in the following way, which can be adapted to cluster internationalization analysis [6]:

- *international clusters global trends* of functioning identification, and ranging factors that influence their activity at the macro level, including political, legal, economic, cultural, socio-cultural, demographic, natural, technological, and outlining the factors on a micro level, providing consumer, suppliers, intermediaries, competitors analysis and the contact audiences effects determination on the cluster association activities.

- *internal factors* determining the company's commitment to integration into the international cluster systems research. When studying internal factors that determine the company's commitment to integration into international cluster systems, it is important to identify the main reasons for companies to launch international activities. The underlying reason for companies to enter foreign markets is to increase profits, but one factor alone is rarely a spur to the action, there is usually a combination of factors.

Recent trends demonstrate the significant impact of globalization on the cluster initiation process. Such influence can be shown through international production cooperation development, which is an important factor affecting economic relationship establishment and forming preconditions for cluster initiation [7].

Multilateral development of international economical relationship opens great opportunities for SMEs to occupy their positions in the global supply chains. Usually, the complexity of the SMEs from emerging markets penetration in global supply chain is connected with the presence of leading firms that coordinate and control the processes of production and marketing of the final product (service) as well as with the ability of enterprises, institutions and organizations to create or use sources of competitive advantage and opportunities for modernization. Thereby, globalization open great opportunities to the local business entities for future growth and become a part of the competitive

units such as clusters. In this case the globalization can be a trigger for cluster spring.

The globalization facilitates the attraction of foreign direct investment to the country, which contributes in the foundation of manufacturing companies, intermediaries and other entities. For example, Japanese car producers, which base clusters abroad, usually establish them by copying their own clusters. Such trend promotes production expansion, infrastructure development, knowledge and innovation diffusion and promote market expansion for small and medium-sized enterprises in the cluster. Such trend is highly connected with TNC performance and can result in cluster spring by production, distribution, R&D relationship establishment with foreign entities and other TNC. That proceeds to cluster formation and initiation of such structures in developing countries.

Clustering makes it necessary the introspection the territorial aspects of the national economy development, and, specifically, regional and interregional links. And that is the important key element of monitoring the growth of the competitive ability of the territory. The main problem is the domination of intuitive initiatives and absence of analytic background, which could allow using internal advantages and possibilities of clusters competently. The clusters functioning today in Ukraine in majority had the natural (evolutionary) development; they are not based on reasonable organizational and economical methods of formation. And actually they are not governed adequately. An important aspect of the cluster internationalization research is to determine the degree of internationalization and members' involvement in the structure of international economic relationship. There are several approaches to determine the international business activities phases: export activity, multinational activity and global activity. The stages of internationalization process depend on the cluster members initiative interests, product peculiarities, international experience etc.

On the basis of Upsala internationalization model and the model of international expansion stages for Ukrainian entities proposed by O. Kanishchenko, in addition to recent trends of international cluster formation analysis, we may propose following approach to the research of cluster internationalization process (see scheme below).

The process of cluster creation should be conducted under reasonable consideration – its existence and effective development becomes possible only with the observance of the following conditions and participants' economic interests, specifically:

- territorial unity;
- innovative activity;
- high professional level in administrative decisions making;

- effective information, transportation and financial infrastructure;
- effective utilization of internal and external resources;
- displacement of accents from centralized to regional / local economic system.

The creation of cluster systems in Ukraine and their internationalization require the detailed study of theoretical bases and practical experience regarded to business co-operative activities, as well as observance of all important conditions of their functioning. Thanks to the adequate use of cluster method the administrative and productive potential of separate national enterprises or industries could be intensively activated and developed. Ukrainian enterprises will get possibility to increase their competitiveness, promoting the level of country position in the international market environment. Moreover the contemporary development of separate businesses and economic systems becomes impossible without two important trends: internationalization and close international cooperation [8]. Both

determine the level of competitiveness, which is one of the major international market imperatives.

As to the world experience the creation of industrial clusters is one among the most common and effective ways of business activities in national and international levels [9]. Due to intensive exchange with financial and intellectual recourses this mode of entrepreneurship allows to multiply the separate economic units' productive potential significantly. The cluster's functioning is provided with development of outsourcing. These takes place when one company delegates some functions and operations to another one, often to the countries with cheaper production recourses. It can be an impetus for supportive industry to develop. For example, Benetton and IKEA have created international production networks between the manufacturers all over the world; they use the capabilities of national producers and this influences supportive industries development, which supply materials and components to the new production.

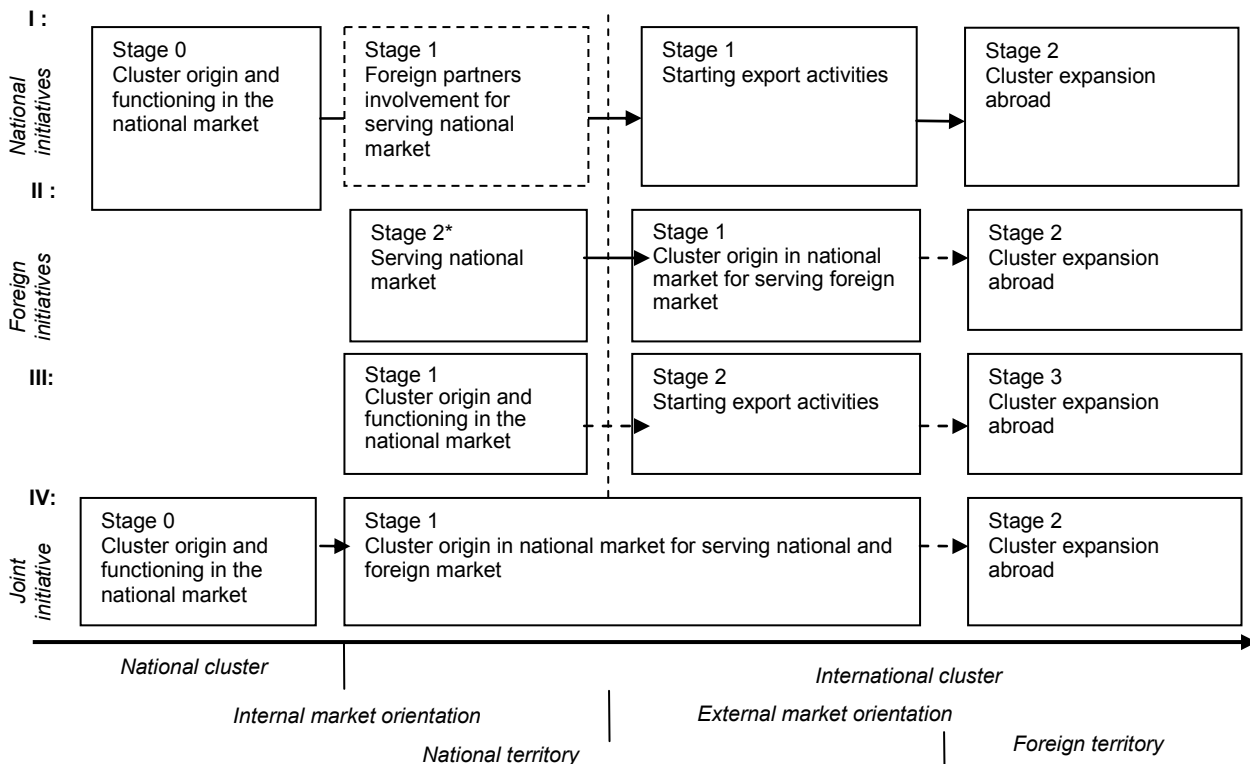


Fig. 1. Alternative scenarios of international cluster initiation

There are a lot of theoretical misunderstandings as to cluster classification. Complication consists in their generous amount and variety. These associations could be based on different bases: size of business (large and small enterprises), territorial areas, level of diversification (within one or few different industries) etc. Thus the clusters could be divided into groups as to: territorial division; industry focus; cluster structure; character of economic relations;

amount of cluster members; depth of co-operation between the cluster participants.

That makes the clear classification rather problematic. The main question: is cluster a method of making business or institutional organization?

Forming of clusters is an ambiguous process, which generates a number of internal contradictions ignoring of which leads to disintegration and disappearance of clusters, in particular:

Table 3. Contradictions of clusterization

Positive results	Negative consequences
<ul style="list-style-type: none"> - intensification of exchange with information and empirical experience between the enterprises of the industry - probability of new approach appearance due to unification of ideas and financial base of different enterprises; - appearance of new producers (more frequent all they appear among participants a cluster and become new participants, or by a separation) 	<ul style="list-style-type: none"> - defense of copyrights, patents, aspiration of non-proliferation of commercial information; - it is strengthening of interdependence between participants, limitation of forms of collaboration with external partners; - is appearance of new competitors and others like that

As to Ukrainian experience the territorial clusters stimulate the development of not only the main key industry, but also a number of supporting industries attracted to cooperation. Cluster development is accelerated with growth of productivity, activation of innovations, new enterprises foundation, and moreover – with activating of competition. All of these are very important for new transitional economies [10].

From the analysis of clusters functioning practice we can assume that clusters have positive and negative aspects of functioning. There are benefits for the cluster organization derived from access to new international partners for cooperation and exchange of personnel, benchmarking etc. Regions and state benefit from the increase in competitiveness and export intensification, access to potential investors and external finance rising.

As noted in the OECD report on "Clusters, Innovation and Entrepreneurship" at the aggregate level, where the clusters positive aspects predominate, it is difficult to identify negative aspects [4]. The report also states that the cluster activities can lead to region overloading, resources inflation and the risk of the region over-specialization, which makes the whole area more vulnerable to external shocks. Ukrainian researchers also emit other negative clustering effects, such as: overconfidence regarding local contacts and knowledge, combined with the external connections neglect and faulty predictions may result in "isolation effect". Cooperation may involve the reduction of competitive pressure that automatically means the innovation driving forces reduction.

Thus, the next step – is the internationalization of the Ukrainian clusters by looking for good international partnership [11]. Business entities from countries with different levels of economic development have different motives for integration into the international cluster structures. Developed countries are mainly "donors" of production, marketing, technology and the developing countries and transition economies act as host countries. Due to this, EU scientists conducted research of main aims for clusters formation by different groups of countries with various levels of economic development: developed countries, developing countries and transition economies.

Based on the analysis of the international innovation clusters formation experience, we can identify the following reasons for the cluster internationalization: technology joint development and implementation to strengthen its own position in the global market, access to know-how and technology, which has not its own network, company's production capacity potential realization, marketing efforts optimization, conducting joint production and marketing activities, improving exchange of experience and information at the international level.

An important issue of the cluster initiation process study is to determine the cluster core interests pursued by business entities while integrating into clusters. Presumably, there are common peculiarities of international cluster formation process for countries with similar levels of economic development, so in order to analyze the international clusters formation experience, we had outlined the main features inherent to this process for each group of countries depending on their level of economic development: developed countries, developing and transitive economies.

The greatest success in the cluster formation reached developed countries [5], where clusters are successfully established and flourishing, providing an important GDP share. In most of developed countries this can be done due to the effective national economic policy aimed at cluster fostering and development.

Developing countries clusters differ from developed countries' ones in at least three aspects: the dynamics of growth (endogenous versus exogenous), organizational structure and geographical distribution. In developing countries, the cluster dynamics is predominantly determined by transnational corporations presence or international customers access. Most developing countries clusters can be represented in the form of so-called satellite clusters, clusters of small and medium enterprises engaged in similar industry and dominated by multinational corporations. Correspondingly, the innovation also depends on the TNC.

Cluster development features in countries in transition is similar to the clusterization in developing countries, however, have some fundamental differences. Transition economies clusters develop under the influence of exogenous and endogenous factors. There are developing own national clusters on the territory of this group of countries. While gradually increasing, these cluster systems initiate international cooperation mainly with other countries in transition, basically for industrial and commercial reasons, and to a lesser matter for joint R&D, further development, collaborating with developed countries and developing countries. An important role on cluster development has national policy, which is mainly focused on the former soviet regional production systems restructuring on the principles of market economy and innovation promotion. Thus, the government main efforts aimed at creating clusters to serve the domestic market.

There are prerequisites for international cluster formation involving Ukrainian counterparts on the basis of international production, scientific, technology cooperation with neighborhood regions (transborder cluster) or involving foreign counterparts from countries which do not have joint border with Ukraine (see Table 4).

Table 4. Prospects of international industrial cluster formation involving Ukrainian counterparts

Cluster name, territory	Cluster initiative type, members	International activity	Prospects for innovation
"Swema", Yaroslavnna euroregion (Sumska oblast (Ukraine), Kurska oblast (Russian Federation))	Joint initiative of national and foreign agents (Type 4). Industrial park "Swema", government	There are prerequisites for cluster origin and functioning in the national market (Stage 0)	International R&D cooperation, prospects for innovative cluster formation
Transport engineering, Donbas euroregion (Donetska oblast (Ukraine), Rostovska oblast (Russian Federation))	National initiatives due to the high production potential (Type 1). Railway plants, educational institutions	Foreign partners involvement for serving national market, starting export activities (Stage 1)	Traditional cluster
Slobodzanschina, Slobodzanschina euroregion (Harkivska oblast (Ukraine), Belgorodska oblast (Russian Federation))	Joint initiative of national and foreign agents (Type 4) for R&D commercialization. Slobodzanschina technology park	Cluster origin in national market for serving national and foreign market (Stage 1)	International scientific and technology cooperation may lead to innovative cluster formation

Table 4 continued

Cluster name, territory	Cluster initiative type, members	International activity	Prospects for innovation
Engineering for agriculture production, (Hersonska oblast, German enterprises)	Mostly national initiatives (Type 1). Government, engineering for agriculture production plants (Hersonmash), educational institutions, scientific institutions (at later stages)	Foreign partners involvement for serving national market, starting export activities (Stage 1)	Cluster formation may be possible after new production technologies and new products implementation. It is possible due to foreign technology exploit and international scientific cooperation. It may lead to innovative cluster formation
Shipbuilding (Crimea (Ukraine), Russian Federation enterprises)	Foreign initiatives (Type 3). Cluster organization assemble as a result of a need for serving foreign orders	Cluster origin and functioning in the national market and stating export activities (Stage 2)	Traditional cluster
IT, Lvivska oblast (Ukraine), Dolina Lotnicza, Dolina Ekologicznej żywności (Poland))	Foreign initiatives (Type 2). IT outsourcing from Poland to Lviv	Cluster origin in national market for serving foreign market (Stage 1)	Innovative cluster

The table 4 shows there are prospects for international industrial cluster formation involving Ukraine. The spring for a cluster formation may be as a result of national or foreign initiative, or may take the form of joint initiative of Ukrainian and foreign enterprises, government, scientific institutions. Nowadays most of such cluster groupings are being at agglomeration and foreign counterparts' involvement stage. Further cluster expansion, scientific organizations involving may lead to innovative activity.

Summary. Globalization plays an important role in the international innovative cluster formation by opening new opportunities for collaboration with foreign partners and encouraging entities to seek more effective methods of cooperation and improving their competitiveness.

Along with the benefits of the cluster activity, which are widely asserted nowadays, clusterization may leads to some negative effects, such as: region overloading, cost inflation, over-specialization, which makes the whole cluster area more vulnerable to external shocks.

Cluster internationalization process is influenced by internal and external factors. There are different approaches to the analysis of cluster formation, which basically describes this process in terms of stages, types and models of cluster initiation. It is explored, that international cluster formation can be initiated by national entities, foreign entities or can take the form of foreign and domestic enterprises joint initiative.

The international innovation cluster formation mechanism for Ukrainian business entities may be proposed to be done in a following way: preconditions for the cluster formation and potential participants monitoring, research and evaluation of mutual interests between aimed participants, relationship establishment, further involvement of other parties and the stable cluster links formation to gain benefits from a cluster interaction.

The prerequisites for international clusters formation involving Ukrainians entities are: economic cooperation within Euro-region, foreign trade (based on free trade

agreements), international scientific and industrial cooperation and other links. The international innovative clusters formation should be made on the basis of former international economic relations between Ukraine and post-Soviet countries recovery, and new areas of economic activity development. The criteria for determination the priority spheres for cluster development need to be selected, for example, it may be: cluster activities should enhance the competitiveness (current or potential) of goods and services with high value added in the international market, the level of international recognition and so on.

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Надійшла до редакції 11.11.13

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ІНТЕРНАЦІОНАЛІЗАЦІЯ ПРОМИСЛОВИХ КЛАСТЕРІВ: ЦІЛІ ТА ПЕРСПЕКТИВИ

В статті розглянуто чинники, інструменти, результати та наслідки формування міжнародних кластерів як фактору активізації інноваційного розвитку національних підприємств.

Ключові слова: кластер, міжнародний кластер, інтернаціоналізація кластерів, кластерні ініціативи, формування кластеру.

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В статье рассмотрены причины, инструменты, результаты и последствия формирования международных кластеров, как фактора активизации инновационного развития национальных предприятий.

Ключевые слова: кластер, международный кластер, интернационализация кластеров, кластерные инициативы, формирование кластера.