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TOURISM CLUSTER AS AN IMPORT SUBSTITUTION STRATEGY IN TOURISM BUSINESS: RUSSIAN CASE STUDY

The paper analyses the conditions for regional tourism cluster development in the Volga Federal District and the related investment activity of the tourism industry. It presents the generalized data on the volume and sources of financing of tourism clusters, along with capital investments assessment and the analysis opf the dynamics of capital investments by the subjects of Russian Federation. The paper is of practical importance in the framework of domestic tourism modernization at the regional level in Russia.

Keywords: *tourism cluster; strategy for tourism development; investment activity; domestic tourism.*
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ТУРИСТИЧНИЙ КЛАСТЕР ЯК СТРАТЕГІЯ ІМПОРТОЗАМІЩЕННЯ В ТУРИСТИЧНОМУ БІЗНЕСІ: НА ПРИКЛАДІ РОСІЇ

У статті проаналізовано умови розвитку регіонального туристичного кластера в Приволзькому федеральному окрузі, а також пов'язану з розвитком туризму інвестиційну діяльність. Надано узагальнені дані щодо обсягів та джерел фінансування туристичних кластерів, оцінено капітальне інвестування в цьому секторі, а також динаміку інвестицій за суб'єктами Російської Федерації. Стаття має практичне значення в контексті модернізації внутрішнього туризму Росії на регіональному рівні.

Ключові слова: *туристичний кластер; стратегія розвитку туризму; інвестиційна діяльність; внутрішній туризм.*
Рис. 1. Табл. 3. Літ. 23.

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ТУРИСТИЧЕСКИЙ КЛАСТЕР КАК СТРАТЕГИЯ ИМПОРТОЗАМЕЩЕНИЯ В ТУРИСТИЧЕСКОМ БИЗНЕСЕ: НА ПРИМЕРЕ РОССИИ

В статье проанализированы условия развития регионального туристического кластера в Приволжском федеральном округе, а также связанная с развитием туризма инвестиционная деятельность. Представлены обобщённые данные об объёмах и источниках финансирования туристических кластеров, оценено капительное инвестирование в данном секторе, а также динамика инвестиций по субъектам Российской Федерации. Статья имеет практическое значение в контексте модернизации внутреннего туризма России на регионально уровне.

Ключевые слова: *туристический кластер; стратегия развития туризма; инвестиционная деятельность; внутренний туризм.*

Introduction. It is Russia's strategic task to launch the programmes of import substitution targeting at a number of domestic industries. Within the framework of the Strategy for Innovative Development of Russian Federation for the period until 2020 the following actions have been planned in the field of tourism. These include refocusing of consumer demand on domestic tourism, attracting foreign tourists, imple-

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mentation of the strategic role of tourism in spiritual development, patriotic education and awareness, providing the improvement of the quality of life (Rasporiazhenie Pravitelstva Rossiiskoi Federatcii, 8.12.2011, # 2227-p). However, the international events of 2015 (fiscal crisis, sanctions, annexation of Crimea, terrorist attack on Russian plane returning to Saint Petersburg from Egypt, shooting down a military plane by Turkish military etc.) had a significant impact on tourism industry in Russia. In experts' opinion, outbound tourism will continue to drop by 30% in the context of travel ban to Turkey and Egypt, or, otherwise, would demonstrate the outbound travel share grown at the end of 2015, in case these destinations are opened for the Russians. The number of Russian citizens who went abroad in 2015 fell by 25% according to the official website of the Federal Agency for Tourism. From 2014 to 2015 the number of tour operators involved in outbound tourism has dropped by 69% (from 2050 to only 650). It is the natural contraction of the market. Further decrease in the number of tourist operators is unlikely, since there are only strong players left at the market, capable to adapt to the current situation and refocus on domestic tourism (Glavnym trendom..., 17.12.2015).

However, tourism and recreational potential of domestic tourism in Russia represents an obstacle for putting into practice these new ambitious tasks. Most Russian regions demonstrate significant tourism resources, but their economic benefits remain low. Tourism infrastructure requires radical renovation, new tourist routes require development and promotion, tourism clusters need to be established around tourism and recreational objects. This means, that first of all, it is necessary to attract investments in order to solve the problems of import substitution in tourism in the shortest possible time and, secondly, particular actions on establishing tourism clusters in regions should be made.

The level of the problem's scientific development. Cluster theory has become one of the most popular concepts when it comes to regional development. Under global competition establishing innovative tourism clusters is a beneficial solution, as they combine entrepreneurial business, strong links between companies and institutions involved in cooperation. The founder of the cluster theory M. Porter (1998) wrote mainly on clusters in industry and defined clusters as "geographic concentrations of interconnected companies, specialized suppliers, service providers, firms in related industries, and associated institutions (universities, standards agencies, and trade associations) in particular fields that compete but also cooperate".

He developed this theory and explained competitiveness and success of export-dependent industries by referring to the competitive factors as the "competitive diamond". Contemporary researchers modified the factors suggested by M. Porter (1998). For example, V. Szekely (2011) argues the interrelation of 4 groups of factors:

1. Strategy and structure of companies and the intensity of domestic competition between rivals (for instance, high degree of rivalry in the sector of tourism influences the introduction of new products and improvement of service quality).

2. Factor input conditions (relative geographical position, available labour forces, capital, natural resources and infrastructure in the territory added by a lot of specialized, unique factors).

3. Demand conditions (size and demand of the market expressed by behaviour of consumers and their specific demands).

4. Presence and quality of locally-based supporting industries related to tourism (accommodation and catering facilities, transport services etc.).

V. Szekely (2011) considers the enhancement of interaction between these groups of factors to have positive impact on tourism industry.

Tourism cluster is a significant innovative element of regional development and economic growth. There are a few works on tourism, that provide evidence that tourism clusters enhance competitiveness of regional economy. S. Nordin (2003) refers to good practices from South Africa, Australia and New Zeland. The research project "The Andalucia tourism cluster" (2011) carried out by Harvard Business School is devoted to Andalucia region and its competitiveness among other tourism clusters in Spain. The issue of the role of state support in fostering tourism cluster development was raised by M. Novell et al. (2006) based on the statistics of British clusters.

M. Mazilu (2012; 2013) analyses the factors of sustainable development necessary for the promotion of Romanian cluster and Turinn cluster at the global market. Croatian researcher I. Moric (2013) views cluster as the development factor for competitive regional tourism. I. Moric (2013) introduces the notion of microcluster as a model for the development of one kind of tourism. This model of microclusters may be useful particularly for less developed regions with transient economy, such as Montenegro, for example. Another Croatian researcher, D. Tubic (2013) describes the synergy effect gained as a result of interdependence of different business organizations within a certain geographic area, cooperation of accommodation, catering and transport services providers, car rent, tourist agencies and operators, recreational, entertaining and other leisure service providers. M. Ferreira (2010) assumes that all the services that can be provided to a tourist should be included into one tourism cluster.

In addition, the structure of a tourism cluster should include support activities: tourist object management, public relations, advertisement, finances, insurance, education, consultancy and other business services (Bergamn and Feser, 2009). A lot of research is carried out on regional clustering. We need to mention the work by M. Kachniewska (2013) on challenges of tourism cluster development in Poland. This work considers vertical and horizontal integration of business entities in tourism that take various forms of partnerships: strategic alliances, joint ventures, consortiums, holding companies, coalitions, franchise agreements etc. As in the cases of Polish tourism clusters M. Kachniewska (2013) argues that "inter-sector regional and local partnerships are preferred by the EU as the effects of endogenous processes building the consensus between local entities, enabling common strategies and the coordination of activities, the access to the key competencies, promote and create innovations, strengthen the identification of the local players within the local social, culture and natural environment, enhance the competitiveness of the regional and local entrepreneurship".

Another example of Australian tourism clusters described in the journal "Regional Tourism Cases Innovation in Regional Tourism" (2005) proves that state programmes support private investments contributed to the development of infrastructure in tourism clusters and facilitate overcoming regional development crises. In this respect Australian state Queensland can be used as a benchmark. Ecotourism cluster established in Queensland brings about 24% of GRP (Huybers and Bennett, 2000).

In general, tourism nowadays has become a significant economic activity demonstrating intensive development rates. According to the data published by the European Cluster Observatory (European Cluster Panorama, 2014), starting from 2007 such cluster category as Hospitality and Tourism steadily increases and has high values in a number of related trade industries, the number of employees.

Since 2009, the European Cluster Excellence Initiative (2012), initiated by the European Commission, DG Enterprise and Industry, is aiming at the development of methodologies and tools support clustering organizations to improve their capabilities in management of networks and clusters. Within this context, 13 project partners from 9 countries – all well experienced in the field of cluster management and support – created a uniform set of cluster management quality indicators and developed a quality labelling system for professional cluster management with the aim to have this methodology and proof of evidence accepted and recognized all over Europe. ECEI uses 5 groups of indicators for annual evaluation of clusters' competitiveness. The evaluation method includes: 1) structure of the cluster; 2) typology, governance, co-operation; 3) financing cluster organization management; 4) strategy, objectives, services; 5) achievements, recognition.

Study area. Cluster approach has been taken as the basis for the Strategy For Tourism Development in Russian Federation for the period until 2020 (Rasporiazhenie Pravitelstva Rossiiskoi Federatcii, 31.05.2014, # 941-p). Every subject of Russian Federation should have certain growth points for tourism development. The problem of investment activity in tourism is stated in the Federal Target Programme "The Development of Domestic and Inbound Tourism in Russia for the period 2011–2018" (Postanovlenie Pravitelstva Rossiiskoi Federatcii, 2.09.2011, # 644). According to the Programme financing of tourism clusters comes from 3 sources: federal budget, regional budget and investments. Cofinancing of projects is also possible from the federal budget in the amount varying from 20% to 25%. The federal funds can be spent on capital investments. Thus, the share of these "capital investments" in the federal budget is 92,756 bln RUB, whereas the share of the subjects of Russian Federation and regional budgets is 24,077 bln RUB. This money can be allocated on capital construction and modernization of supporting infrastructure of established tourist objects with long-term pay-back period. The share of non-budgetary sources spent of establishing and modernization of the tourist objects is 217,293 bln RUB. Non-budgetary funds are spent on construction of hotel complexes with different comfort level (mini-hotels, motels, recreational complexes) on the territory of tourism and auto-tourism clusters including shopping streets with catering and entertainment facilities, all-season souvenir fairs, aqua parks, mountain skiing centres, transport complexes, yacht clubs etc.

Research methods. The research includes the analysis of the statistics on tourism development in Russia and its regions. As research methods, factor and structural analysis, forecasting methods are applied. Statistical and factual information is taken from the reports of the World Tourism Organization (UNWTO), the materials of the Federal Target Program "Development of domestic and inbound tourism in the Russian Federation (2011–2018)", Reports of the Federal Agency for Tourism of the

Ministry of Culture of Russian Federation, materials and regional support programs for tourism development.

Research result interpretation and analysis. Development of tourism potential in Russian regions. The Federal Agency for Tourism (Rosturism) selected the prospective regions for creating competitive regional tourism infrastructure, including the constituent subjects of Volga Federal District (VFD) used in this research. These include the Republic of Bashkortostan, the Republic of Tatarstan, Chuvash Republic, Nizhny Novgorod and Samara regions. The estimated value of every investment project varies from 3 to 5 bln RUB including cofinancing contribution from the federal budget. In the framework of the projects it is planned to create 2,000–5,000 working places (given the multiplicative effect) and increase incoming tourists volumes by 200,000–400,000 people.

In terms of capital investments the driving region of the Volga Federal District is the Republic of Tatarstan. Its contribution into Volga Federal District investment share is 22%. Nizhny Novgorod and Samara regions also have good indicators. They have equal shares of 13% investments. The Republic of Bashkortostan has a little lower share of 12%. The Perm territory contributes only 9%. As in 2014 the contribution of Orenburg region was 7%, Saratov region – 5%, Penza region and the Republic of Udmurt have equal indicators of investment contribution of 4%. Ulyanovsk and Kirov regions contribute 3% each, and Chuvash Republic and the Republic of Mari El – 2.5 each.

In Figure 1 the regions of the Volga Federal District are rated in terms of their capital investment contribution. The period taken in question 2013–2014.

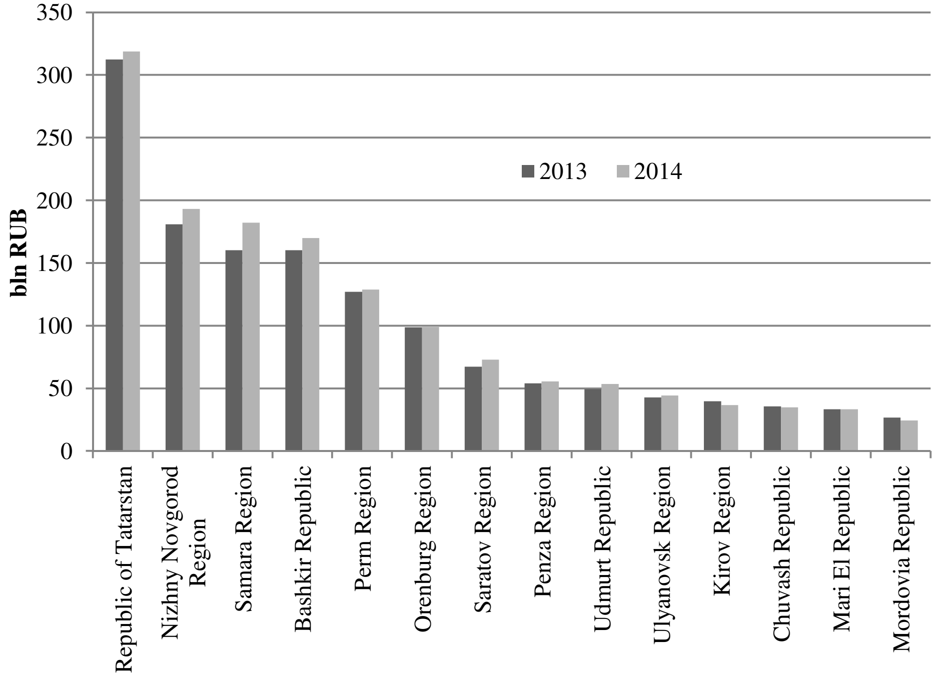

Figure 1. **Capital investments of the regions of Volga Federal District,** *bln RUB, authors' presentation*

In order to provide better understanding of the situation we shall refer to the earnings yield gained by the Volga District from tourism for the past few years (Table 1).

Table 1. **Earnings from tourism in Volga District,** *bln RUB* (www.russiatourism.ru)

Earnings yield in the Volga Region	2010	2011	2012	2013
Scope of tourism services	14	16	20	25
Revenue turnover gained from hotels and catering	79	92	113	154

The number of staff employed in tourism companies, hotels and restaurants is rather unstable. Increase in tourist visits is also very unstable. The number of tourists accommodated in hotels in 2011 and 2012 grew by 10–15%. The similar value for 2013 is already low – only 4%. The number of foreign visitors accommodated in hotels also varies.

As it can be seen from Table 2, although the values of tourist arrivals are not very high, there is an increase in the earnings yield due to the prices' rise, rather than increase in the number of tourist arrivals. However, the aggravated political situation with popular tourist resort countries like Turkey and Egypt in 2016 is bound to reverse the situation towards domestic tourism. High investment activity of the Volga District in tourism business is the indicator of optimistic investors' expectations of domestic tourism.

Table 2. **Dynamics of staff employed in tourism and tourist arrivals in the Volga District,** *ths people* (www.russiatourism.ru)

Statistical key figures in the field of tourism in the Volga Federal District	2010	2011	2012	2013
Number of staff employed in tourism companies	6.1	7.3	7.7	7.8
Number of staff employed in hotels and restaurants	148	154	163	156
Number of Russian tourists, accommodated in collective facilities	4460	4914	5635	5850
Number of foreign tourists, accommodated in collective facilities	151	145.2	229.8	238.5

For the purpose of current research we analysed the documents of the Federal Agency for Tourism tabbed under "Implementation of Federal Target Programmes" page. The website of Federal Agency for Tourism contains official orders for every year of the programme implementation and presentations of investment projects. Data on the volumes and sources of finances implemented within the Federal Programme of 2011–2018 as well as new projects, approved by the end of 2014 were included in Table 3.

The analysis of applications submitted to the Federal Agency for Tourism shows that almost all the regions included into the Volga Federal District participate in the application process for tourism cluster financing except the Ulyanovsk Region. The latter is excluded from the process due to its low tourism potential and investment opportunities.

In general, the indicators of investment activity in the Volga Federal District demonstrate high potential and favourable conditions for direct investments and capital contribution into economy in general. Tourism is the industry with significant multiplicative effect. Thus, one of the priority streamlines of economic development in the Volga regions should be promotion of tourism and recreational complex.

Table 3. **Data on the volumes and sources of financing tourism clusters in the Volga Federal District,** *mln RUB, authors' compilation*

Name of the tourism and recreation cluster (TRC)	Federal budget	Regional budget	Private investments	Total
TRC "Sviyazhsk" (Republic of Tatarstan)	72	14.4	483.3	570.7
TRC (Republic of Bashkortostan)	70	21	160	251
TRC "Velikaya Perm" (Great Perm) (Perm Territory)	633	172	2084	2889
TRC "Zavolgorechie" (Nizhny Novgorod Region)	70	21	160	251
TRC "Zhigulevskaya Zhemchuzhina" (Zhigulev Perl) (Samara Region)	2420	416	13925	16762
TRC "Penzensky" (Penza Region)	1237	471	4496	6204
TRC "Solenye Ozera" (Salt-water Lakes) (Orenburg Region)	70	17.5	105.5	193
TRC "Ethnic Chuvashia" (Chuvashia Republic)	59.6	9.9	726.6	796.1
TRC "Chuvashia – the heart of River Volga" (Republic of Chuvashia)	541	50	1140.1	1731.1
TRC "Kamsky Bereg" (River bank of Kama) (Republic of Udmurtia)	224	58	761	1043
TRC "Gorod Chempionov" ("city of champions") (Saransk, Republic of Mordovia)	1546	350	3600	5495
TRC "Volgydo" (Republic of Mari El)	574.8	80	1457.9	2112.7
TRC "Tsar-grad" (Republic of Mari El)	620.3	92.7	1550	2263

Summing up the investment analysis necessary for establishing new clusters in tourism industry in the regions of the Volga Federal District, we should state that the following regions are the most active in applying for financing to the Federal Agency for Tourism (Rosturism): Samara region (13 applications), Nizhny Novgorod region (12 applications), Perm region (6 applications), Chuvash Republic (6 applications), Orenburg region (5 applications), the Republic of Bashkortostan (5 applications), the Republic of Mari El (5 applications), Udmurt Republic (5 applications). Kirov region (3 applications) and Saratov region (1 application) are not very active on applying for funds. Ulyanovsk region did not apply for funding at all.

With the worsening of political and economic situation, sanctions introduction, and the fall in value of the ruble, regional investment problems are particularly pressing. By this we also mean the issue of economic safety of tourism entities which involves both economic and social aspects.

The analysis of the regions of the Volga Federal District in terms of financing recreational and tourism clusters proved that the regions understand that tourism infrastructure is an important aspect capable to attract or distract tourists to the area. In most cases in order to attract visitors to the area tourist infrastructure should be modernized, which requires actions aimed at attracting significant financial investments.

Conclusion. For the purpose of developing a well grounded strategy aimed at attracting investments in the regions we analyzed the dynamics of investment flows to the regions of Volga Federal District, which demonstrated high investment potential of Volga regions in general as well as favourable conditions for direct investments and capital contributions into the economy of the region. We believe that this opportunity of establishing new tourism clusters on regional and interregional levels should not be squandered. Of course, creating and developing a tourism cluster is a very complicated process. Quality of its development should be constantly monitored. Russian research, similar to European Cluster Observatory or European Cluster Excellence Initiative are just at the very initial stage. Analogue of the European Cluster Observatory has been created at the National Research University "Higher School of Economics", Institute for Statistical Studies and Economics of Knowledge (ISSEK). Russian Cluster Observatory publishes analytical reports for the past 3 years, beginning from 2013 (Reiting innovatcionnogo razvitiia..., 2015).

The Volga Federal District, analyzed in the paper, takes the third position after the Central and North-West Districts in terms of cluster initiatives development which is considered to be a good indicator. Nevertheless, the issue of state support of the created tourism cluster is still unsolved. Such funding would create long-term budget, higher involvement and more active positions of all the stakeholders. In this respect we should emphasize creating a favourable business environment as well as state and private partnerships for the development of tourism infrastructure and creating opportunities for professional and advanced training of tourism and hospitality specialists.

Tourism business in the Volga Federal Districts currently benefits from the continuously injected investments. As it can be seen from the tables above, 40 bln RUB were allocated for tourism cluster development until 2018, including 30 bln RUB of private investments. The data analyzed indicate a slight increase in the number of staff employed in tourism business against much higher indicators of profitability growth in the Volga Federal District.

The actual annual increase of the amount of chargeable tourism services significantly surpasses the planned one: 24% instead of annually planned 10%. The number of specialists employed in tourism fails to meet the minimum standards stipulated in the programmes for tourism development in the Volga District. The Republic of Bashkortostan demands the increase of specialists employed in tourism by 8%. The Ulyanovsk Region plans to increase the number of qualified tourism specialists by 30%, the Republic of Tatarstan – by 37%, the Republic of Chuvashia – by 44% and the Republic of Udmurtia – by 81%. Statistical data analyzed within the current research doesn't meet the planned indicators. There is an increase in the number of staff employed in tourism only in 4% of cases.

We argue that the emphasis on Russian tourism investment in the present economic situation is bound to improve the annual tourism indicators stipulated in the programmes for tourism development in the Volga Federal District, namely:

- the inflow of visitors;
- income from tourism infrastructure objects;
- budget return of duties and taxes gained from selling tourism goods and services;
- workplaces in tourism and related businesses;
- activation of small and medium businesses;
- preserving natural capital and cultural heritage of the region.

We believe that meeting the abovementioned conditions will accelerate cluster initiatives in Russian regions in the near future, which will significantly improve the situation with import substitution in tourism.

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