

Транскордонне співробітництво

УДК [339.1:338.48]:339.92:005
JEL L83, F15, F29

M. P. Malska, O. P. Bilanyuk

The concept of smart specialization as a methodological basis for the development of cross-border tourist markets

The potential of the concept of smart specialization and its application for the development of cross-border tourism markets is considered. The Europe 2020 Strategy, based on the principles of smart specialization, sustainable and inclusive development, has been analyzed. The prospects for the development of tourism in the context of the priorities of the Europe 2020 Strategy are defined: according to the Strategy, tourism is not allocated as a sphere of concentration of resources, at the same time, tourism is stimulated on the basis of smart specialization. It was found that 28 EU regions chose tourism as one of the priority activities in innovative development strategies. Another 44 regions focus on various aspects of economic development indirectly related to the tourism industry. The directions of development of tourism on the basis of smart specialization are substantiated, among them: modernization by means of application of different kinds of technologies, which will have an impact on the efficiency of tourism sphere functioning; activation of scientific researches on the functioning of the tourism sector; introduction of scientific research into practical activities; the creation of clusters, the development of local networks to include more local entrepreneurs; use of energy efficient buildings and environmentally friendly transport; production of innovations in such areas as medical tourism, health tourism, etc.; search for new entrepreneurial initiatives in the field of tourism that would allow to attract and effectively use human (including creative) potential, for example, business or active tourism. It has been established that in Ukraine, smart specialization as an innovative decision-making system in the field of regional and structural policy in practice has not been developed at all.

Keywords: smart specialization, tourism, regional development, smart region, cross-border tourist markets.

Problem statement. The implementation of the Association Agreement with the European Union, as well as economic integration into the EU common market, and ensuring inclusion in the global value-added chains are important directions of social and economic development of Ukraine in the nearest future. «Europe 2020: A Strategy for Smart, Sustainable and Inclusive Development» [4] is the basic document defining the EU's future development policy. The development of Ukrainian-Polish cross-border markets, in particular tourist destinations, can not be considered outside of this strategy. In view of this, the principles laid down in the Strategy Europe 2020 should become the conceptual basis for the development of cross-border tourist markets.

Analysis of recent research. According to Bevilacqua S., Pizzimenti R., Maione S. (2016) [1], the concept of smart specialization and a place-based approach are the basis of modern Strategy Europe 2020. Smart specialization is the ability of the region to focus on the development of core competences, using opportunities to concentrate resources in order to achieve the stated goals (Foray, 2015) [5].

The concept of smart specialization is quite new. It was first introduced in the report of D. Foray and B. van Ark's work «Smart Specialization in a truly Integrated Research Area is the key to attract more R & D to Europe» [6] in 2007 and was developed on the basis of criticism of European industrial policy. As an ideology and strategic priority for EU development, it was presented in Europe 2020 Strategy, which, along with the principles of sustainable and inclusive development, was recognized as one of the three fundamental priorities.

This priority foresaw resistance to the following four areas:

1. Research and innovation;
2. Information and communication technologies;
3. Competitiveness of small and medium enterprises (SMEs);
4. The transition to a low carbon economy.

© M. P. Malska, O. P. Bilanyuk

These areas formed the basis of the EU's policy of financial support within the framework of structural funds.

The main principle of the search for promising directions for the future specialization of the region was the so-called entrepreneurial discovery – finding the points of the regional potential for the effective use of technologies in order to change the production function of specific promising sectors of the regional economy. The authors considered this the main principle of smart specialization, which distinguishes this innovative approach to defining the priorities of regional development from the previous ones. At the same time, the developers of the idea of smart specialization remarked that «any model that does not contain this condition will have a completely different character. «At the same time, smart specialization was assigned the task of mitigating certain regional problems (lack of human capital, inequalities in access to innovation) that hindered the full realization of regional potential and made technological changes in the basic branches of the regional economy impossible. In general, smart specialization is positioned by its authors as a model of territorial development, based on structural changes, aimed at creating competitive advantages of regional economies at the expense of specialized diversification and transfer of innovations [1].

The application of this new approach is defined as a key component of cooperation within the framework of the European Neighborhood Policy on the possibility of using European structural and investment funds. Proceeding from the need to join the Strategy of Smart Specializations of the European Union, in Ukraine since 2016, quite active work is under way to develop a position agreed upon with the EU.

The paper purpose is to reveal the potential of the concept of smart specialization as a methodological basis of development of cross-border tourist markets.

Major research findings. To adequately apply the principles of smart specialization and to obtain positive results on this basis, it is extremely important to correctly understand the essence of this innovative system of smart solutions developed by the European Union to intensify structural changes in the regional economy, the formation and development of regional capacity for effective functioning in the major world markets. However, smart specialization in Ukraine, as an innovative decision-making system in the field of regional and structural policy, has not been developed in practice at all.

Speaking about the tourism industry, it is not considered as a priority for smart specialization either in Ukraine or in the EU, as it is characterized by relatively lower innovation and the need for smart technologies in contrast to high-tech spheres of the economy. Moreover, as researchers point out, tourism policy research is «extremely fragmented and largely ignored, which demonstrates a certain isolation of tourism from innovation policy and discourses of innovation systems» [7].

At the same time, the detailed study of the strategic objectives of the development of the regions of the EU, presented on the Smart Specialization Platform (<http://s3platform.jrc.ec.europa/>) and included 153 regions from 19 member countries, allows to say the following. Even in spite of the skepticism about the classification of tourism to the areas of smart specialization, 28 EU regions chose tourism as one of the priority activities in innovative development strategies. Another 44 regions focus on various aspects of economic development indirectly related to the tourism industry, such as maritime transport and logistics, fisheries and aquaculture, shipbuilding, construction, maritime tourism, etc. Most countries / regions that did not include tourism in their development strategies are actually financing tourism-related projects for other thematic objectives, mainly for the purpose of «competitiveness of small and medium-sized enterprises».

In fact, according to the Europe 2020 Strategy, tourism is not allocated as a resource concentration area. At the same time, the development of tourism is stimulated on the basis of smart specialization. In particular, about 1.3 billion euro can be involved through the development of small and medium-sized businesses in tourism, about 4 billion through the development of a cultural heritage, which is basically a state infrastructure.

Among other thematic areas, the following should be noted:

- The purpose of «research and innovation» is to strengthen the potential of research and innovation ($R + I$) in the field of tourism and related industries through comprehensive interconnection and support for university-business cooperation. In particular, in support of business innovation, product diversification, value added innovation, management and skill development, the development of specific aspects and niches for competitive advantages (for example, green tourism, sustainable tourism, health tourism, etc.);
- The second objective stimulates the development of information and communication technologies solutions for tourism business and the further development of e-tourism offerings;
- The third goal is to finance projects aimed at supporting entrepreneurship, for example, investing in the launch or modernization of small and medium-sized enterprises in the field of tourism through grants, as well as consultancy services for small and medium-sized businesses.

For example, one can not assume that the Alpine tourist region itself develops on the principles of reasonable specialisation. However, as new projects are being implemented in the region, which foresee, for example, the active use of information and communication technologies (ICTs) aimed at changing the operational process of tourism services or expanding the list of tourist services, this region in the near future may turn into a «region of smart specialization [5].

Within these programs, the tourism industry could claim 8.8 billion euros during 2014-2020. To compare the expenditure of EU funds related to tourism and culture in the previous program period 2007-2013 amounted to 10.3 billion euros [9].

In what do we see the potential of tourism development on the principles of smart specialization? In our opinion, the following areas should be highlighted here:

1. Modernization through the use of various technologies that will have an impact on the efficiency of the tourism sector:

- Use of geodata for the development of tourism programs, creating geoportals;
- Implementation of ICT and digital media technologies for the modernization of the tourism sector, improving the quality of tourist services;
- Application of ICT for improving the quality of tourism management at all levels;

1. Activization of scientific researches of functioning of the tourist sphere, introduction of scientific developments in practical activity;

2. Creation of clusters, development of local networks in order to include more local entrepreneurs;

3. The use of energy efficient buildings and environmentally friendly transport;

4. Production of innovations in such areas as medical tourism, health tourism, etc.;

5. Search for new entrepreneurial initiatives in the field of tourism that would allow to attract and effectively use human (including creative) potential. For example, business or active tourism;

6. The use of tourism as a stimulator for the development of related sectors of the economy, in particular, agriculture, ICT, renewable energy, construction, etc.

Consequently, European experience proves that it is important to consider tourism not as a sphere in the shadow of the industrial sector but as an integral part of the regional innovation system and an element of the development of the knowledge economy in the region. Unpredictable in modern conditions is a tourism development strategy based solely on the use of cultural and natural resources. Equally incorrect is the vision of modernization and innovative tourism development solely in the more active use of ICTs and the Internet. Equally important role should be played by managerial innovations, the production of innovative services, the use of technologies related to the use of robotics, innovative medical equipment, renewable energy, etc.

The European Commission divides innovative strategies into three types: technology leadership strategies; strategies of imitation of innovations; preventive strategies to avoid globalization risks. If this classification is used, then the second type of innovation strategy can be considered optimal for tourism enterprises / clusters / markets, that is to say the widest possible use of already developed innovations.

In general, the concept of smart specialisation can be considered a turning point for European policy. The latter focuses on finding new innovative growth-enhancing points that can enable regions to oppose the negative economic manifestations of globalization.

Important for our research in the context of the combination of innovative development factors, and institutions operating in the region is the concept of a «smart region». This concept is a logical extension of the concept of a smart city [3, 8].

While the power of the «smart city» lies in the effect of economic agglomeration, which leads to higher rates of innovation, productivity and technological infrastructure development, the «smart region» is developing at the expense of local values such as the environment, culture, landscape and communities, which become structural elements of economic growth. Thus, the interaction between technologies, innovations and specific local values, such as local cultural heritage, a network of interactions between small and medium enterprises and knowledge centers can have the potential to stimulate local economies and increase local competitiveness. Thus, the technology paradigm within the smart region exhausts itself and becomes one of the tools that can reconstruct the spatial interaction chains within the territories and communities.

In general, the development of smart regions at the expense of technological innovation can be complemented by the development of cultural and business tourism, agriculture on the basis of sustainable use of nature, the introduction of logistics and knowledge network [3]. Therefore, the application of the concept of smart specialization in a local dimension contributes to economic growth, along with the improvement of natural, human and social resources, by transforming local identity into a decisive factor in the dissemination of innovative services.

Conclusions. Thus, in the context of the implementation of the Europe 2020 Strategy, the development of cross-border tourism markets between Ukraine and the EU countries should be based on the principles of smart specialization, sustainable and inclusive growth. At the same time, tourism itself, as one of the highly dynamic spheres of economic activity, has the potential for development on the basis of the active involvement of innovative products, information and communication technologies, as well as the effective use of the internal potential of the transborder region in order to identify new entrepreneurial initiatives and points of economic growth. This, in turn, will in the long run allow to proceed to the implementation of a smart region model.

References

1. Snihova, O. Yu. (2018). Rozkrytyta potentsialu smart-spetsializatsiyi dlya podolannya rehional'noyi strukturnoyi inertnosti v Ukraini [Disclosure of the potential of smart specialization to overcome regional structural inertia in Ukraine]. *Ekonomika Ukrainy – Economy of Ukraine*, 8, 75-88. [in Ukrainian].
2. Bevilacqua, C., Pizzimenti, P., & Maione, C. (2016). *Research and innovation strategies in cluster policies*. Methodological approach to cluster spatialisation. MAPS-LED Project. Retrieved from http://www.cluds-7fp.unirc.it/assets/dl_3_research-and-innovation-wp1.pdf
3. Bonomi, A., & Masiero, R. (2014). *Dalla Smart City alla Smart Land*. Venezia.
4. *Europe 2020 Strategy* (2015). European Commission. Retrieved from https://ec.europa.eu/info/business-economy-euro/economic-and-fiscal-policy-coordination/eu-economic-governance-monitoring-prevention-correction/european-semester/framework/europe-2020-strategy_en
5. Foray, D. (2014). *Smart Specialisation: Opportunities and Challenges for Regional Innovation Policy*. Routledge. <https://books.google.com.ua/books?id=8jxHBAAAQBAJ>
6. Foray, D., & van Ark, B. (2007). *Smart specialisation in a truly integrated research area is the key to attracting more R&D to Europe*. Knowledge Economists Policy Brief n°1. Expert Group “Knowledge for growth”. Retrieved from http://ec.europa.eu/invest-in-research/pdf/download_en/policy_brief1.pdf
7. Rodríguez Sánchez, I., Williams, A., & Hall, C. (2014, Aug). Tourism Innovation Policy: Implementation and Outcomes. *Annals of Tourism Research*. Retrieved from https://www.researchgate.net/publication/265592446_Tourism_Innovation_Policy_Implementation_and_Outcomes
8. Schaffers, H., Ratti, C., & Komninos, N. (2012). Special Issue on Smart Applications for Smart Cities – New Approaches to Innovation. *Journal of Theoretical and Applied Electronic Commerce Research*, 7 (3).
9. Schultze, C. (2015). Smart specialisation strategies and ERDF tourism investments. In *Smart cooperation in coastal and maritime tourism – Encouraging transnational partnerships through clusters and networks* (Brussels, 20.01.2015). Retrieved from ec.europa.eu/DocsRoom/documents/8484

Список використаних джерел

1. Снігова О. Ю. Розкриття потенціалу смартспеціалізації для подолання регіональної структурної інертності в Україні // Економіка України. 2018. №8. С. 75-88.
2. Bevilacqua C., Pizzimenti P., Maione C. *Research and innovation strategies in cluster policies*. Methodological approach to cluster spatialisation. MAPS-LED Project, 2016. 411 p. Retrieved from http://www.cluds-7fp.unirc.it/assets/dl_3_research-and-innovation-wp1.pdf
3. Bonomi A., Masiero R. *Dalla Smart City alla Smart Land*. Venezia, 2014. 144 p.
4. *Europe 2020 Strategy*. European Commission, 2015. Retrieved from https://ec.europa.eu/info/business-economy-euro/economic-and-fiscal-policy-coordination/eu-economic-governance-monitoring-prevention-correction/european-semester/framework/europe-2020-strategy_en
5. Foray D. *Smart Specialisation: Opportunities and Challenges for Regional Innovation Policy*. Routledge, 2014. 104 p. Retrieved from <https://books.google.com.ua/books?id=8jxHBAAAQBAJ>
6. Foray D., van Ark B. *Smart specialisation in a truly integrated research area is the key to attracting more R&D to Europe*. Knowledge Economists Policy Brief n°1. Expert Group «Knowledge for growth», 2007. Retrieved from http://ec.europa.eu/invest-in-research/pdf/download_en/policy_brief1.pdf
7. Rodríguez Sánchez I., Williams A., Hall C. *Tourism Innovation Policy: Implementation and Outcomes // Annals of Tourism Research*, 2014 Aug. Retrieved from https://www.researchgate.net/publication/265592446_Tourism_Innovation_Policy_Implementation_and_Outcomes
8. Schaffers H., Ratti C., Kommnos N. Special Issue on Smart Applications for Smart Cities – New Approaches to Innovation. *Journal of Theoretical and Applied Electronic Commerce Research*, 7 (3), 2012.
9. Schultze C. Smart specialisation strategies and ERDF tourism investments // *Smart cooperation in coastal and maritime tourism – Encouraging transnational partnerships through clusters and networks* (Brussels, 20.01.2015). Retrieved from ec.europa.eu/DocsRoom/documents/8484

Мальська М. П., Біланюк О. П. Концепція смарт-спеціалізації як методологічна основа розвитку транскордонних туристичних ринків.

Розглянуто потенціал концепції смарт спеціалізації та напрямки її застосування для розвитку транскордонних туристичних ринків. Проаналізовано Стратегію розвитку Європи 2020, яка базується на принципах розумної спеціалізації, сталою та інклюзивною розвитку. Визначено перспективи розвитку сфери туризму в контексті пріоритетів Стратегії Європа 2020: відповідно до Стратегії туризм не виділено в ролі сфери концентрації ресурсів, водночас стимулюється розвиток туризму на засадах розумної спеціалізації. Виявлено, що 28 регіонів ЄС обрали туризм як один з пріоритетних видів діяльності в інноваційних стратегіях розвитку. Ще 44 регіони зосереджені на різних аспектах економічного розвитку, опосередковано пов'язаних з туристичною індустрією. Обрунтовано напрями розвитку туризму на засадах розумної спеціалізації, серед яких: модернізація шляхом застосування різного роду технологій, що матиме вплив на ефективність функціонування сфери туризму; активізація наукових досліджень функціонування туристичної сфери, впровадження в практичну діяльність наукових розробок; створення кластерів, розвиток локальних мереж задля включення більшої кількості місцевих підприємств; використання енергоєфективних будівель та екологічно чистого транспорту; продукування інновацій у таких сферах, як медичний туризм, оздоровчий туризм тощо; пошук нових підприємницьких ініціатив у сфері туризму, які б дозволяли залучати та ефективно використовувати людський (зокрема креативний) потенціал, для прикладу, діловий чи активний туризм. Європейський досвід доводить, що важливо розглядати туризм не як сферу, що перебуває в тіні промислового сектору, а як невід'ємну складову регіональної інноваційної системи та елемент розвитку економіки знань у регіоні. Безперспективною в сучасних умовах є стратегія розвитку туризму, що базується виключно на засадах використання культурних і природних ресурсів. Так само хибним є бачення модернізації та інноваційного розвитку туризму виключно у більш активному використанні ІКТ та Інтернету. Не менш важливу роль мають відіграти управлінські інновації, продукування інноваційних видів послуг, використання технологій, пов'язаних з використанням робототехніки, інноваційної медичної апаратури, відновлюваної енергетики тощо. Встановлено, що в Україні смарт-спеціалізація саме як інноваційна система прийняття рішень у сфері регіональної та структурної політики на практиці взагалі не отримала розвитку.

Ключові слова: розумна спеціалізація, туризм, регіональний розвиток, розумний регіон, транскордонний туристичний ринок.

Мальська Марта Пилипівна – доктор економічних наук, професор, завідувач кафедри туризму Львівського національного університету імені Івана Франка (e-mail: malskym@ukr.net, ORCID ID: <https://orcid.org/0000-0001-8887-6565>).

Malska Marta Pylipivna – Dr. Sci. (Econ.), Prof., Head of the Department of tourism of the Ivan Franko National University of Lviv.

Біланюк Ольга Петрівна – асистент кафедри туризму Львівського національного університету імені Івана Франка (e-mail: bilanyuk.olha@gmail.com, ORCID ID: <https://orcid.org/0000-0002-2119-863X>).

Bilanyuk Olha Petrivna – Ph.D. (Econ.), Assistant Professor of the Department of tourism of the Ivan Franko National University of Lviv.

Надійшло 20.06.2018 р.