

### III. ГЕОГРАФІЯ РЕКРЕАЦІЇ ТА ТУРИЗМУ

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#### CLUSTER COOPERATION OF RURAL TOURISM PARTICIPANTS AS A MECHANISM OF ADAPTATION TO MODERN CHALLENGES (EXAMPLE OF WESTERN REGIONS OF UKRAINE)

*Creation by the state of favourable conditions for the support of small and medium-sized enterprises, as local support, at the territorial level is essential for preserving the integrity of the system in possible opposition to geopolitical and geoeconomic shifts. Such a shift, in particular, is Russia's invasion of the territory of Ukraine. The western regions of Ukraine were the first to face the new challenges and began to adapt, namely the subjects involved in rural tourism actively.*

*Thus, through the analysis of the previous scientific work, the article highlighted the social and economic context of rural areas and overcoming social isolation inherent in the rural environment in general and in the conditions of martial law in particular; and outlined the principles of forming cluster cooperation between relevant subjects as an essential mechanism of their collaboration. As part of the expedition to the western regions of Ukraine, the following were investigated: aspects of the activities of representatives of small and medium-sized enterprises involved in the organization of rural tourism in the territory or are participants in the cluster of rural tourism in conditions of already martial law; conditions for the formation of cluster cooperation between participants, the role of tourism in regional development and the advantages of cluster cooperation for the development of a tourist destination.*

*According to the results of field research in the territory of the western regions, the opinion was confirmed that the cluster approach in the interaction of small and medium-sized business entities involved in a particular direction allows for deepening and improving their work, optimizing production processes, more rationally using the resource potential of the territory, and relatively faster and easier to respond to challenges.*

*Thus, the successful cluster cooperation of subjects involved in the organization of rural tourism, following the example of the western regions of Ukraine, can become an example and an impetus for the implementation of this model of cooperation throughout the country. Cluster participants demonstrated how important it is to mobilize resources, adapt to modern realities, respond to challenges on time, and help their citizens with their work.*

**Keywords:** rural territory, rural tourism, cluster of rural tourism, western regions of Ukraine.

**Relevance of the research.** The modern world is endowed with a specific character, and all the global changes and transformations that occur create large-scale consequences and lead to local changes. Today, all countries, and Ukraine in particular, need to rethink their economic and geopolitical models and forms of management, not to be guided only by consumption and growth, but to create conditions and support small and medium-sized enterprises as local support at the local (territorial) level in the face of global geopolitical and geoeconomic shift.

Since the beginning of the full-scale invasion of Russia on the territory of Ukraine, tourism, like other industries, has suffered significant losses and changes. Not new, by definition, but unique in its scope and reasons, the category of the population of Ukraine, such as *internally displaced persons*<sup>1</sup>, if we speak in the types of urbanism, has activated (often uncontrollably) the processes of counter-urbanization, which means the outflow (relocation) of the population from old urban centres to suburbs or into new and *expanding* mid-sized cities. But the suburbs or new and medium-sized cities must *expand* in our conditions. Still, they are located *in relatively safer* regions and *more distant* from areas where active hostilities are taking place. Medium-sized and small cities and mainly rural areas in these regions, along with the need for economic (and political) restructuring, faced social

tensions arising from different perceptions and lifestyles between displaced and residents.

The subjects involved in rural tourism, which in recent years began to acquire significant demand in Ukraine among domestic and foreign tourists, were the first to face new challenges and began to adapt actively. As a rule, representatives of small and medium-sized businesses are involved in organising rural (green) tourism. Adapting to martial law conditions, they faced the following challenges: economic (and political) restructuring and social changes caused, in particular, by the internal displacement of the population, which in turn put forward new or updated requirements for the role of tourism and recreation.

**The aim of the study.** Based on the above, we can outline the following goals of this research: to study at the theoretical level the dynamic social and economic context of rural areas and overcome social isolation, often characteristic of the rural environment; outline the principles of forming cluster cooperation between financial entities; to study the aspects of the activities of small business entities in the conditions of already martial law on the example of the studied western regions of Ukraine, which are involved in the organization of rural tourism in the territory, or are participants in the cluster of rural tourism; conditions for the formation of cluster cooperation between participants, the

<sup>1</sup> **An internally displaced person (IDP)** is a citizen of Ukraine, a foreigner or a stateless person who is in the territory of Ukraine on legal grounds and has the right to permanent residence in Ukraine, who was forced to leave or leave his place of living as a result of or to avoid the negative consequences of armed conflict,

temporary occupation, widespread manifestations of violence, violations of human rights and emergencies of a natural or manufactured nature. (*Portal of public services iGov*)

role of tourism in regional development, and the advantages of cluster cooperation for developing a tourist destination.

**Research materials and methods.** The theoretical foundations of the research on the social and economic context of rural areas are made based on numerous scientific works in this direction, in particular: the theoretical and methodological principles of the study of the rural regions were very successfully developed by O. Pavlov (Pavlov, 2009); socio-economic problems of reproduction and effective use of the resource potential of the village were deeply investigated by S. I. Melnyk. (Melnyk, 2004); N. V. Morozuk formulated important concepts of sustainable development of rural areas. (Morozuk, 2014); Yu. Zinko wrote a lot about the expediency of cluster cooperation in rural tourism as one of the tools of sustainable rural development of the territory (Zinko, 2018; Zinko, Malska, et al., 2019). In the course of the research, it became necessary also to define the concept of "social isolation" or "social alienation", which is typical for the rural environment, here the work of the authors Shucksmith M. and Chapman P. (Shucksmith & Chapman, 2002) is an excellent scientific work.

Also, this research has an expeditionary component, which made it possible to confirm the opinion that the cluster approach in the interaction of small and medium-sized business entities involved in a particular direction allows deepening and improving their work, optimizing production processes, more rationally using the resource potential of the territory, and faster and relatively easier to adapt to challenges.

**Statement of the problem and its theoretical formulation.** The study of rural areas' social and economic context will be appropriate, a survey of restructuring processes evident in most industrialized countries since the 1970s. The rural regions have been included in significant economic, social, social, and political changes. Before World War II, the rural systems of most developed countries retained a certain homogeneity and identity, despite the growth of commercial agriculture. However, this is often no longer the case, as the weakening of former structures has resulted from several dimensions of restructuring:

- the collapse of peripheral territories unable to transition to a more capital-intensive economy;
- a selective process of industrialization of a significant part of the remaining agricultural sector;
- the pressure of urban and former urban development; and
- the political and economic transformation in post-communist Central and Eastern Europe, which has raised political issues that are opposite, but interconnected, to the problems of Western Europe, in the latter case, both in terms of the adoption of Western "advice" and models, and the desire for integration through accession to the EU).

Factors that became a prerequisite for significant changes in agriculture and social changes also contributed to the reverse processes and turned rural areas into attractive places to live and work. Among them, the following can be distinguished:

- mechanization, which dramatically reduced the need for agricultural labour, stimulated continuous rural-to-urban or rural-to-rural migration, and made both residential and non-residential real estate available for repeated use or the same use by different residents, with often markedly different values and lifestyle; and
- the tendency towards more excellent centralization of state and commercial activities contributed to the reduction or elimination of many services in rural settlements.

The combination of these two factors means that many villages can no longer function as typical residential settlements, as the decline in the number of farms and the decline in the agricultural population reduces the labour force and weakens the ability of the local community to maintain the previous range of goods and services. In many rural areas, especially where extensive agribusiness is not dominant, there is a repopulation of rural residents with a non-agricultural population. It is driven by increased demand for real estate, recreation and leisure, which in turn is contributing to marked demographic and socio-economic changes in many rural areas.

Each territory, including rural areas, can be characterized by integrity and relative autonomy. Its *integrity* is based on historical, geographical, demographic, economic features, and ethnic and cultural traditions. *Relative autonomy* is mainly on a functional basis, namely the ability of a specific territory to relatively autonomously carry out administrative management, organizational-economic, and socio-cultural activities and to satisfy its vital and social needs. However, the development of any local territory, mainly rural, should always be carried out in close interaction with the territorial environment. That is, the autonomous territorial evolutionary process must necessarily consider the interests of adjacent territories (Melnyk, 2004). Society also needs due attention to the study of the peculiarities and organizational and economic mechanisms of using the resource potential of rural areas, which directly impacts the development of the Ukrainian countryside. Therefore, successful administrative management, and economic organization, together with sociocultural activities, can resist those negative social changes and, in fact, social isolation, which often arises due to the appearance of unfavourable conditions of a different nature or when adapting to new, albeit necessary changes, such as, after the unification of territories into communities, during the implementation of social integration measures (through the mechanisms of civil integration, economic integration, interpersonal integration), economic cooperation or the performance of innovative activities, etc. (Shucksmith & Chapman, 2002).

When individuals or areas suffer from related problems such as unemployment, low skills, low income, poor housing, high crime, poor health and family breakdown, social exclusion tends to occur. It has usually been seen as an urban problem, affecting inner-city neighbourhoods and urban public housing estates, but social exclusion also has a strong presence in rural areas. The characteristics of social exclusion in rural areas can be as follows: socially isolated households in rural areas, as a rule, are geographically scattered; rural housing problems may have more to do with affordability than quality, and rural employment problems may have more to do with low wages and seasonality than unemployment; distance, isolation and poor access to work, services and other opportunities complicate the issues of the rural population; more traditional views of rural self-reliance may also lead to social exclusion that goes unreported or unnoticed, as rural communities may also be seen by others as more self-sufficient and mutually supportive, with less need for external support.

All villages that are currently included in the settlement network of Ukraine and are suitable for people's life and activities must be developed, taking into account the functions that they will have to perform in the future. Along with the investment of funds in the social development of settlements of centres of social service systems, priority

should be given to social and industrial construction related to the creation of jobs for rural residents at the place of residence in small, remote villages to equalize living conditions in different categories of settlements, preventing their extinction. Based on the necessity of revitalizing the Ukrainian village, forming the resettlement system, and developing the main centres of household services for its residents, it is essential to clearly define the functional purpose of each of the existing rural settlements. And the key is the revival of the Ukrainian village based on its *multifunctional development*.

And while tourism is only one of several potential opportunities to diversify the rural economy, some believe it has the added benefit of exploiting the landscape's existing "natural" resources and the availability of open space. And here, we need an effective system of administrative management since resource management is almost the most essential condition for the functioning of any complex territorial systems of various levels, in particular, the level of united territorial communities (UTC), which is a type of territorial communities, including a large number rural communities that were formed in Ukraine during the decentralization reform in 2015-2020. The rational use of natural and anthropogenic resources, and recreation in particular, forms a scientific basis for overcoming conflicts between the preservation of resources and their use by humans, contributing to the accompanying economic development and ecological integrity, which will allow maintaining the sustainability of the environment, which means the sustainable development of all types of activities on the territory.

To prevent the "privatization" of power in the tourism sphere is essential to create civil society institutions at various levels, especially local ones. Many public and private organizations have embraced tourism and recreation as sources of potential recovery in the face of declining agricultural incomes and limited employment opportunities in the industry. In 1996, the Council of Europe formulated recommendations for developing rural tourism – the European Charter for Rural Areas. Advocating for diversification from agriculture to alternative forms of land use, the Council of Europe proposed the following in its "guidelines" (*Council of Europe (1996) Recommendation 1296 (1996) on a European Charter for Rural Areas, 1996*).

1. *The parties must take all necessary legal, fiscal and administrative measures to develop tourism in rural areas in general and agricultural tourism in particular, considering the respective territories' carrying capacity. In particular, it can be done by encouraging the provision of rural hostels and by encouraging farmers who offer tourist accommodation on their farms in addition to their agricultural activities to do so.*

2. *In implementing this policy, the parties shall strive for a balance between the necessary development of tourism, the protection of nature and the potential offered by existing infrastructures and services by maintaining the quality of the landscape and environment and preserving traditional architecture and materials.*

At the same time, the Council of Europe proposed recommendations regarding measures to be taken by small and medium-sized entrepreneurs involved in commercial and craft activities with the aim of:

a. *Promotion of small and medium-sized businesses of an industrial, commercial or artisanal nature: on the one hand, by improving the framework conditions through the simplification of administrative and fiscal*

*procedures and through tax incentives for investments; and, on the other hand, by improving infrastructure and providing low-interest loans to businesses and entrepreneurs. Finally, it would be helpful and practical to lower taxes to encourage small traders to stay in business in rural communities;*

b. *Provision of appropriate means for business integration and consulting;*

c. *Facilitating the creation of advanced, high-tech companies with high added value, as well as service companies using automatic transmission and data processing systems;*

d. *Promoting the improvement of production, processing and marketing of regional products and assisting schemes in favour of high-quality craft activities.*

Considering the recommendations outlined above and competitiveness in the tourist environment, rural tourism in Ukraine faced organizational, economic and marketing challenges even in peacetime. And even more so today. Therefore, cooperation, mutual assistance and involvement will only help survive and support small businesses in rural tourism. And here, using a *cluster approach* to developing recreation and tourism can be an extremely effective and efficient tool. The successful functioning of the territorial recreation system and the formation of a recreation-tourism cluster makes it possible to effectively use natural and anthropogenic recreation resources and historical and cultural heritage and significantly strengthen the influence of the recreation sphere and tourism on the economic development of the region. A cluster approach is a long-proven tool for effectively managing the territory's resources and accelerating its economic development. Tourist clusters can be organized based on hospitality establishments in the presence of specialized tourism development centres or specific tourist destinations. Tourist clusters include enterprises, or groups of enterprises, concentrated within a particular territory, which can jointly use recreational resources, specialized tourist infrastructure, local labour markets, and also, what is essential, carry out joint marketing, advertising and information activities to promote a tourist product on the market. Cluster formation occurs naturally, but accelerating development requires targeted efforts (*Zinko, Malska, et al., 2019*).

**Presentation of the results of the expeditionary part of the study.** The cluster idea in the tourism industry at the beginning of the 21st century. Found its embodiment in Ukraine. In the Strategy for the Development of Tourism and Resorts of Ukraine until 2026, the position regarding creating tourist clusters is established among the priority administrative and infrastructural areas of activity. And the western regions of Ukraine became one of the first regions to implement provisions regarding cluster activities in rural tourism.

Thus, within the framework of the 1st stage of the joint Ukrainian-Estonian project between Taras Shevchenko Kyiv National University and Tallinn University entitled "*Improvement of small businesses and development of the university education system through research and promotion of tourism clusters in rural areas in Ukraine*", the goal is being realized regarding promotion of communication and exchange of experience between entrepreneurs and local self-government bodies from different regions of Ukraine and integration of practical experience into university educational programs. The joint expedition, which took place in the period from May 11 to 17, 2022, along the

route of Lviv, Ivano-Frankivsk, Khmelnytskyi and Volyn oblasts, involved interviewing subjects of small businesses, representatives of local administration, communities involved in the organization of rural tourism in the territory, or are participants in the cluster of rural tourism.

Based on the results of the work and conducted in-depth interviews, it is possible to draw the first conclusions regarding the change in the context of the further development of rural areas and directions of entrepreneurial activity there. Thus, Skoliv UTC became the first to help internally displaced persons with accommodation, food, and psychological support from February 24, when Russia launched a large-scale invasion of Ukraine. The Kamin-Kashyrskyi community of the Volyn region became the discovery of our expedition because it is not often that you come across a situation when the local government not only verbally supports those who decide to develop tourism in the territory but also acts as the initiator of many projects and activities, helps in every possible way to everyone who applies to her with help and concrete actions show that the development of tourism is one of the most priority areas for her.

All respondents with whom we managed to communicate – from the head of the Kamin-Kashyrskyi community, Viktor Pas, to the teachers of the Mostyshchenska gymnasium, who take care of the school's ethnographic museum, are united by extraordinary perseverance, caused by love for their native land and their work. And this is manifested in the organization of aid to refugees or the collection of humanitarian assistance and in plans for developing tourism in the community.

The war made adjustments to the work of the clusters. Since the beginning of the full-scale war, cluster members have comprehensively helped the Armed Forces of Ukraine and internally displaced persons. Thus, the rural tourism cluster "Boykivski gazdy" is one of those who actively supported refugees in the problematic first minutes of their stay in the community, providing places to live in their estates and moral support for people. The Skoliv city council created a collection point for humanitarian aid and, together with the cluster, cooperated with charitable foundations to meet people's needs as much as possible and provide comfortable conditions for staying in the community. Currently, most clusters have adjusted their work and continue to help people who come to their communities from hot spots.

Today, the most significant internal problems regarding the development of tourist destinations are the need for more information, poorly developed infrastructure and low interest of local authorities to participate in the development of tourism in their region. However, there is a clear understanding by the respondents that a massive role in the development of rural tourism is played by the close interaction of the government, business and community. Therefore, and within the framework of the clusters, the participants continue to cooperate in organizing one-day tours, excursions, joint lunches, and accommodation of tourists in green estates.

An excellent example of fruitful cooperation between the cluster and the authorities is the Kamin-Kashyrskyi community of the Volyn region, where the local authorities actively promote the development of rural green tourism. On February 4, 2022, the deputies unanimously adopted the Program for the Development of Rural Tourism, which provided for marketing activities, the safety of tourists, and the purchase of various equipment for rafting on rivers. Furthermore, the representatives of the local authorities

noted that they do not plan to stop. On the contrary, they will organize the activities provided for by the program, namely, conducting a variety of training for all those who wish to engage in rural green tourism and, as far as possible, engaging in marketing activities.

Rural tourism is a promising area for small businesses in the field of tourism. Leaders and cluster participants believe that the best way to encourage the local population to engage in rural tourism is to show by their example that it is suitable and profitable. To raise the level of interest of the local population is necessary to hold courses and training, at which people will be told about the advantages of rural tourism, the prospects for the development of their region, and examples of successful clusters will be shown. Many people do not see their area as attractive to tourists and need to learn how to attract tourists to their region. Such training should push people to the desire to develop their part and directly participate in it themselves.

Rural green tourism is significant for developing domestic tourism in the country. After all, it contributes to the accelerated development of rural areas, increases the level of welfare of the rural population, diversifies agricultural production and provides solutions to several other tasks. However, representatives of rural tourism point out that in the post-war period, the most significant support for rural tourism development can be targeted projects, for example, for the development of a cluster or narrowly focused programs and grants from the European Union.

**Conclusions.** Over the past decades, the role of the village has changed significantly in the modern environment. Currently, rural areas are not only a place to provide people with the basics of life but also promising territories for developing rural tourism. The development of the Ukrainian countryside in the field of tourism is an essential step in developing domestic tourism in Ukraine in general. Today, cooperation, investment, assistance, and cooperation with foreign partners are vital to supporting the implementation of rural tourism development plans. The cluster approach makes it possible to fulfil the stated goals faster and can become a crucial tool in achieving the goals.

Ukraine has enormous natural and economic potential. But in the first days of the war, the essential resource was humans. The participation of each individual at the level available to him and in the form possible for him enabled the country to survive. Western regions of Ukraine withstood the social and economic challenge that was "imposed" on it in the first days (weeks, months) of the war. They have become a support for millions and shelter for thousands of families. And here, local support was provided by small and medium-sized business entities involved in rural tourism, who quickly oriented themselves, mobilized their strength and capabilities and, using the existing specialized tourist infrastructure, continued to receive and accommodate, but no longer tourists, but whole families of internally displaced persons. And what was once tourist entertainment, such as the participation of tourists in various economic processes, was turned into an opportunity to get a full-fledged workplace for internally displaced persons who, due to circumstances beyond their control, are forced to stay in this area. Successful cluster cooperation of rural tourism participants in the western regions of Ukraine can become an example and impetus for spreading and implementing this cooperation model throughout the country. The clusters showed how important it is to adapt to modern realities, respond to challenges in a timely manner and help our citizens with our work.

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### КЛАСТЕРНА СПІВПРАЦЯ УЧАСНИКІВ СІЛЬСЬКОГО ТУРИЗМУ ЯК МЕХАНІЗМ АДАПТАЦІЇ ДО СУЧАСНИХ ВИКЛИКІВ (НА ПРИКЛАДІ ЗАХІДНИХ РЕГІОНІВ УКРАЇНИ)

Створення державою сприятливих умов для підтримки малого й середнього підприємництва, як локальної опори, на місцевому (територіальному) рівні є важливою умовою збереження цілісності системи у можливому протистоянні геополітичним і гео економічним зсувам. Таким зсувом, зокрема, є вторгнення Росії на територію України. Найпершими з новими викликами стикнулися і почали активно адаптуватися західні регіони України, власне суб'єкти, задіяні у сфері сільського туризму.

Через аналіз попереднього наукового доробку було висвітлено соціальний і економічний контекст сільської місцевості та подолання соціальної ізоляції, властивої сільському середовищу в цілому, а в умовах воєнного стану особливо. Окреслено засади формування кластерної співпраці між відповідними суб'єктами як важливого механізму їхньої кооперації. У межах експедиційної частини по західних регіонах України було досліджено: аспекти діяльності представників малого й середнього підприємництва, що задіяні в організації сільського туризму на території, або є учасниками кластеру сільського туризму, в умовах уже воєнного стану; обставини формування кластерної співпраці між учасниками, роль туризму в регіональному розвитку та переваги кластерної співпраці для зростання туристичної дестинації.

За результатами польових досліджень на території було підтверджено думку, що кластерний підхід у взаємодії суб'єктів малого й середнього підприємництва, задіяних у певному напрямі, дозволяє поглибити та покращити їх роботу, оптимізувати виробничі процеси, раціональніше використовувати ресурсний потенціал території, та швидше і порівняно легше давати відповідь викликам.

Таким чином, успішна кластерна співпраця суб'єктів, задіяних в організації сільського туризму може стати прикладом і поштовхом для впровадження даної моделі кооперації по всій країні. Учасники кластерів продемонстрували, наскільки важливим є вміння мобілізувати ресурси й адаптуватися до сучасних реалій, вчасно реагувати на виклики та допомагати своєю роботою громадянам.

Ключові слова: сільська територія, сільський туризм, кластер сільського туризму, західні регіони України.