REVIEW OF CLUSTERS CONCEPTS ON PERSPECTIVE OF TOURISM INDUSTRY

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Abstract

Attention on global and local networks between tourism firms and organized on the basis of it clusters is increasing among of researchers. Previous studies mostly cover cluster related aspects of networks, but there is no one system of approach and there are different conclusions, where is the need for proper clarification and classification of all existing concepts. The aim of this paper is to analyze and make a review of the existing literature on cluster concepts for tourism industry. This paper differs from previous researches in that it addresses the tourism dimension of the networking literature and mostly focuses on firm-level analyzes. The findings of this paper reveal that literature review make a consensus on several aspects such as that there is a positive relation between large firms and the global level of networking in tourism industry, the specialization and agglomeration of firms in a cluster does not determine the level of connectedness. Based on previous researchers conclusions this paper finds that in most casesthere is a necessity for developing networks not only at a local level but also at a global level.

Key words: clusters, tourism industry, literature review, networking

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1. Introduction

For a long time, networking is accepted as a very important factor of competitive advantage of regions and firms (Porter, 1990). Volatile global markets are the main reason for firms and regions actively to be engaged in networks, due to the wish of companies to survive in those markets (Van den Berg et.al, 2001). Network relationships are particularly important for the tourism sector, as groups of organizations cluster together to form a destination context (Pavlovich, 2003). Some researchers claim (Gray, 1989; Hassan, 2000; Jamal & Getz, 1995; Tinsley & Lynch, 2001) that creating a competitive destination encourages them to join together and is the core common goal for firms in tourism industry. But there are also other reasons for the collaboration of tourism firms, for example firms try to benefit from the different advantages of networking and collaboration (Bramwell& Sharman, 1999; Selin& Chavez, 1995).

One of such benefits is thatthrough networks it is possible to lower the transaction costs and to exploit the external economies of scale and to scope in various activities (Tremblay, 2000) through pooling and spreading risk, and by creating access to complementary resources (Kumar & van Dissel, 1996). Transaction cost theory (Williamson, 1985, 1999) states that this network allows participants to benefit from the advantages of vertical integration. Another benefit is that participants can share ideas, among each other where network helps richer learn and understand issues, leading to more innovative activities (Camagni, 1991; Roberts & Bradley, 1991; Roome, 2001; To¨dtling& Kaufmann, 1999). Learning-based innovative collaborative networks are important for increasing the capabilities of firms through rules that guide the behaviour of interacting entities (Kogut, 2000). Also one of benefits has been mentioned by Lane (1994) where he states that collaborative networks improve the coordination of policies and related actions, and promote consideration of the economic, environmental, and social impacts of tourism in development strategies. We should not forget about another feature of clusters, where small actors with limited or fewer resources can become a part of the decision-making process, particularly those that are not able to pursue sustainable development in isolation. Last benefit to be mentioned is that networks enable for firms to widen their skill base and support their development, by

providing them with quick access to more extensive resources and knowledge. The partners can then implement new activities and engage in joint researches, co-development and joint marketing, and thereby gain a competitive advantage while avoiding size-related problems (Bocquet, et.al., 2006). It is important to consider different costs involved in networking relations for different kind of firms in different type of clusters. Depending on the level and type of derived benefits difficulties can arise in establishing harmony in relationships.

2. Different approaches for definitions of clusters

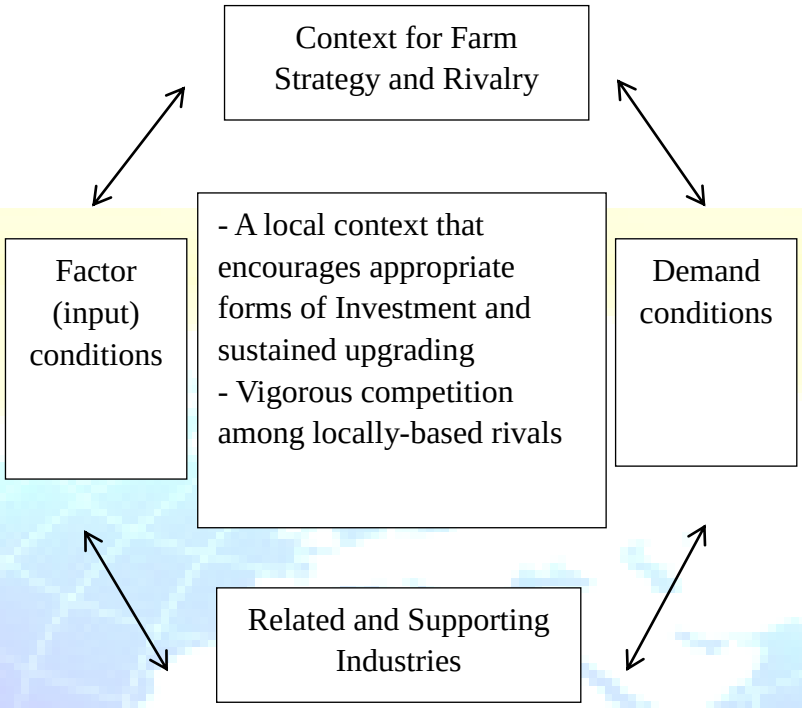
One of key features of clusters is indeed networks. Networking is very important for clusters, and clusters are generally defined by the local networks. Usually most of network relations between firms appear in a specific area (Van den Berg et al., 2001) and broaden at a local level in a cluster. In general the term "cluster"can be used in as a group of specialized organizations in localized network. These firms from different levels of industrial chain are closely linked between each other. Also we should mention that in development literature it has beenemphasized that the competitiveness of clusters also depends on global networks, and that local networks are not the only factor. Therefore, by revealing the type of clusters which have strong global networks, important assumptions can be made related to the competitiveness of different clusters. The classification of the level of networks is also actual for firms and their success. Unlike local networks external networks of firms are not bounded to cluster on criteria of their characteristics. In order to achieve competitiveness in the global market networks between firms can extend to a higher global level.The size of the firm is one of the factors which can impact to the level of networking. Taking into account that in the global tourism market maintaining competitiveness, attracting global customers, achieving strong relations with global supplier firms such as tour operators are crucial the role of global networks become even more important for tourism firms. In this context, the different levels of networks that exist between tourism firms require to be studied in order to define if the size of firms has a significant impact on defining the level of networking. There are papers which try to define the relationship between certain characteristics of tourism firms and clusters with respect to the existence of local and global network relationships.

Ozturk(2009) makes an attempt to understand networking differentials of different type of firms in differentiated clusters on the basis of two groups of hypotheses. The first group of hypotheses is based on the nature of the type of cluster; ‘‘agglomerated tourism clusters are important for defining the level of network relations of tourism firms in a cluster’’, and ‘‘specialized clusters are important for defining the level of network relations of tourism firms in a cluster’’. The second group hypothesis is based on the nature of the firm; ‘‘firm size defines the level of networking of a tourism firm’’. Research has been conducted on a basis of a quantitative analysis on the level of networking between different sizes of firms, covering hotels, travel agencies, tour operators, airlines and car rental firms, where quantitative analysis of different cluster types: agglomerated/non-agglomerated clusters and specialized/ non-specialized clusters are also were used.

There are approaches which claim that beside of existing federal, provincial and regional tourism initiatives there should be a responsibility, at a micro-economic level, on local tourism businesses to contribute to their region’s development. A possible way of activating local businesses to contribute in this way is via the creation of business clusters. Porter (1998, p. 197) defines a cluster as ‘geographic concentrations of interconnected companies, specialised suppliers, service providers, firms in related industries, and associated institutions in particular fields that compete but also cooperate’. Clusters are broader than industries capturing linkages, complementarities, marketing, customer needs, and skills that cut across firms and industries. This attribute of cutting across, and linking the fortunes of, firms and industries enhances the global competitiveness of firms within the cluster. Such cluster development incorporating competition between like firms facilitates increased productivity, increases the capacity for innovation and productivity growth, and stimulates new business formation that supports innovation (Porter, 1998, p. 213). The cluster approach entails making more efficient use of knowledge and on building constructive interactions between different parties in the cluster.

Figure 1.

Porter's diamond



Source: Adapted from Porter, 1998, p. 211

Clusterpolicies are designed to strengthen competition based on differentiation and specialisation, rather than competition based on imitation and cost cutting (Jacobs & de Man, 1996). The fostering of cooperative relationships based on differentiated businesses is also emphasised by Doeringer and Terkla (1995) and Gordon and McCann (2000) and the application of cluster theory in the tourism industry by others including Go and Williams (1993), Hall (2004, 2005a, 2005b), Hall, Cambourne, Macionis, and Johnson (1997) Jackson and Murphy (2002) and Konosolas (2002). In cluster analysis, government support is not focused on protectionism or subsidisation of industry sectors but more to improving the business environment through infrastructure development of public and quasipublic goods that impact across a range of industries. This means that the role of government includes facilitating inputs such as an educated workforce, physical infrastructure, accreditation and regulation of standards and provision of accurate and timely economic information. Additionally, the governmental outlook includes ensuring macroeconomic

and political stability as well as appropriate taxation and legal systems.

3. Characteristics of successful clusters

Tourism clusters usually include all elements of the tourism mix including accommodation providers, food and beverage, travel and tours, attraction coordinators, event promoters, education and re-search institutions. Geographic boundaries in most cases reflect to economic, not political reality, hence clusters should not be confined by state or local government borders. In addition to establishing linkages between tourism and tourism-related sectors within a geographic location, the following characteristics of Porter's model are important. A shared understanding of the competitive business ethic implies that all cluster participants understand that gains in productivity and innovation will contribute more to competitive advantage than price cutting underpinned by low wages, low taxes or a devalued currency. Competition between firms producing the same product is more likely to lead to innovation and differentiation than is collusion to limit competition or seek government subsidies. The heterogeneity of the elements of the cluster is also an important aspect of the theory in the tourism context, as the horizontal linkages that are developed are unlikely to create the situation where the members of the cluster share a uniform approach to competition that may inhibit innovation. In fostering an attitude to competition based on differentiation and innovation rather than price, close attention to personal relationships and trust in sustained collaboration represents the tacit business-to-business understanding that goes beyond the written contracts. As a result of long-term business relationships, trust builds up between the various parties. While initially public sector authorities may be involved in facilitating cluster development, the leadership for the established cluster should be from within the business membership of the clusters. Strong leadership will allow explicit up-front goal setting and continual reinforcement of these goals to avoid the urge to seek subsidies or limit competition. Central and provincial governments, local trade and business development organizations may take an important facilitation role in formalizing and institutionalizing links and relationships between tourism businesses to ensure the longer-term survival of the cluster. This formalization of relationships is a point of difference from earlier industrial district models of business organization.

In sum, cluster theory features the importance of location, partnerships between organizations, the importance of cluster intersections and the synergies achieved through competition alongside cooperation between differentiated firms. It is embedded in Porter's (1990) theory of competitive advantage as a means of strengthening the linkages between related and supporting industries within a context for firm strategy and structure dictated by a nation's culture and political economy.

As pointed out by Bordas (1994), 'Nowadays the success of a cluster in international tourism markets depends less and less on its comparative advantages and more on its competitive ones'. Hence, the idea is to move from possession of the comparative advantage, which may be endowed by natural advantages, to a position of competitive advantage utilizing the theory of business clusters. A properly functioning business cluster will reduce isolation of small and medium enterprises, result in increased productivity, an increased capacity for innovation and will stimulate new business formation. In addition to creating an environment that fosters innovation, a healthy cluster attaining a critical mass also generates a self-reinforcing process to which other businesses are attracted because a growing cluster signals opportunity for alert entrepreneurs. It is also possible that the development of a cluster in one industry will lead to recognition and development of other related clusters. For example, the development of a tourism cluster could be a positive force in improving infrastructure such as transport and communication links for other industry clusters. In such a way, the development of tourism business clusters seems an ideal way of supporting general economic development.

4. Local and global networks in differentiated clusters and firms

Despite the growing amount of literature focusing on networking, clusters and tourism, still it is the manufacturing and technology-based industries that have drawn the most interest. Only a few recent studies (e.g.Canina, Enz, & Harrison, 2005; Hall, 2005; Michael, 2003, 2004; Nordin, 2003; Saxena, 2005; Tinsley & Lynch, 2001) deal with the implications of networks and cluster formation in the tourism sector (Novelli, Schmitz, & Spencer, 2006).

But still there are some limited number of researches where discussions on the contributions made

by the level of networking to competitiveness, and their relations with cluster and firm characteristics. According to literature networking can be at different levels: they can be either worldwide, such as global networks, or they can be restricted to a specific area, such as local networks (Amin & Thrift, 1994; Capello, 1994; Van den Berg et al., 2001). There are different periods of developing the concept and of discussion of networking levels in literature, beginning with local networks in 1980s continued the 1990s, the roles of global networks have been pointed as crucial factors for the competitiveness of the region.

4.1.Clusters development through local networking

Local networks are the basic assets of clusters known as ‘‘industrial districts’’ (Harrison, 1992; Piore&Sabel, 1984; Pyke, Becattini, &Sengenberger, 1990; Scott, 1988; Scott &Storper, 1989).

In this literature, the contributions of networks and their importance in local development are discussed by emphasizing the role of place-specific local networks in clusters. A lot of authors have emphasized the dynamics of clusters. In 1927,Marshall (1964)discussed the strong dynamics of industrial concentration (agglomeration), where firms interact with each other and, therefore, gain external economies of scale. Porter (1990) states that firms cluster in mutually reinforcing concentrated areas where high positive externalities are generated due to common features of geography and industry (Novelli et al., 2006). Actors or participants of the cluster can compete globally through co-operating locally by networks.

Clusters unite firms from different levels in the industrial and supply chain (suppliers, customers), with service units (Van den Berg et al., 2001), resulting in interdependence of firms through value chain links within the cluster through common customers, technologies, inputs, distribution channels and infrastructure. The intricate linkages of clustering tend to produce complementarities within industries and market niches, and also between different institutions based on diminishing transaction costs and ‘close’ working relationships (Hopkins, 2001). Through this, new services and products are being developed, and competitive advantage can be achieved. Boekholt (1994)and Lazonick (1992) pay attention to that fact that in the performance of a cluster, a major role is played by the networking relations, not only between the same type of organizations, but

also between firms and organizations operating in different sectors. We notice that a complex system of connections and interrelationships are formed in tourism clusters because of the complementary products of activities, such as transport and catering, accommodation, which co-exist alongside infra-structure and support activities (Pavlovich, 2003). In general, clusters are not that easy to define, and the classification of clusters is also not so clear.Porter (1990)never discussed the geographical scale of clusters. But there are still some other researchers who have provided different definitions (Enright, 1996; Fingleton, et al. 2003, 2004, 2005; Michael, 2003; Park, 2000; Poon, 1994; Rosenfeld, 1997). Actually, several of definitions of clusters are focused on the classification of specialization, agglomeration and the dimension of the relations. Specialized clusters based on a concentration of the same type of tourism firms. As a matter of fact, non-specialized clusters are also essential due to the benefits of the complementary differences that attract firms to dissimilar firms (Baum &Haveman, 1997), which include also both small- and large tourism firms. Agglomerated clusters mean that a high number of firms are actually in a cluster, in the same time non-agglomerated means that there are lower numbers. According to reviewed literature firm size is an important indicator in defining the level of linkages among firms. Clusters can cover large and small firms with different proportions, affecting on the level of specialization and defining the level of networking within that cluster. Arndt and Sternberg (2000) in their research come to the conclusion that the relational behavior of small firms is more spatially embedded and strongly tied with local networks rather than large firms. This happens because of the fact that small firms need more resources than large firms and, as a result, need each other, because they cannot achieve alone what they can do together. This kind of understanding of interdependence, results inacceptingof the fact that there is a need to cooperate, and in this connectionfor networking (Bjo¨rk& Virtanen, 2003), which impulses the success of the firms.

4.2.Global networking for competitive clusters

Papers starting from 1990s in most cases claim that no region can achieve sustained growth and competitiveness through relying only on local networks and endogenous processes in contemporary economic relations. While local networks of firms in clusters have important

internal dynamics and created externalities, global networks don't let a lock-in situation among locally bounded clusters (Amin & Thrift, 1994;Camagni, 1991; Cooke, 1997; Schmitz, 1999). The related literature recently argues that not only local networking, but also global networking (Amin & Thrift, 1994; Camagni, 1991; Schmitz, 1999) and spatially unbounded network relationships are required if clusters want to achieve the individual competitiveness of the firms and of clusters themselves. According to Breschi and Lissoni (2001) it is important to have agents inside the clusters which can translate local tacit knowledge into codified knowledge and re-combine it with external knowledge.

In general, global networks are important for the tourism sector, because they support to obtain strong relations with global supplier firms to attract global demand, through relations between tour operators and hotels. Thus, global complementary relations are considered as a highly significant in providing service to the destination. During the evaluation of competitiveness of the destination the level of impact of global networks for tourism firms needs to be identified.

In the interactive global environment, it is claimed that transnational firms play a key role (Van den Berg et al., 2001). Particularly, large industry players which have sufficient resources have been upgrading and globalizing their network systems in tourism (Braun, 2005). Several studies into industrial development have emphasized the close link between global networking and large firms.To¨dtling and Kaufmann (1999) state that ‘‘larger firms interact more with support institutions and global value chains’’, in the same time Lynch (2000) focuses on stable mentality of SMEs and their resistance to external interventions. However, according toGreffe (1994) small tourism firms are more likely to have network structures that exist only within a cluster on complementary products, such as accommodation, catering and transport. In general, there is an approach from reviewed literature which says that large firms are strong enough to develop global linkages, while small firms in most cases lack the resources to keep abreast of developments, and as a result act individually. Depending on gained benefit from networking both levels of networking offers various advantages for tourism. During the literature review we found that there are limited number of papers which discuss about the relations among cluster types, firm size and

the level of networking.

From reviewed literature we can sum up that most of the large tourism firms are globally connected, such as hotels, transport firms, travel agencies, tour operators, airline firms and car rental firms. In the same time medium-sized travel agents and tour operators show a globally connected structure in their relationships, the medium-sized hotels show a different structure, with equal distribution among global connections (connections with other firms outside country), local connections (connections with other firms in the same and nearby clusters) and those with no connection. The small firms, especially those providing accommodation, seem to be less locally connected and more with no connections. Interesting is that most of the small tourism firms, with hotels being the exception, seem to be highly connected with other firms at both local and global levels. The surprising fact that most of the small hotels seem to be less locally connected or not connected at all can be because of the absence of large firms in the cluster, as some researchers identified. Logically we can say that large firms play a leading role in developing networking relations, not only at a local level, but also at a global level.

If just to focus in these aspects results show that while global integration is extremely high among the large tourism firms, this is not the case for small firms. We found that there are debates on this situation among management scholars. We can give some evidences for this case: ‘‘small firms are more spatially embedded and are more closely tied with local networks than large firms’’ (Arndt & Sternberg, 2000), while ‘‘large firms are tied closer to global networks and have weaker connections to local networks than smaller firms’’ (Eraydın&Fingleton, 2006). According to Jones and Haven-Tang (2005),because of their high service quality and carefully coordinated marketing strategy, the enthusiasm of large tourism firms for destination-based local partnerships to promote destination competitiveness is less than small- and medium-sized firms in tourism.Also because of lack of financial resources and less research and development activities small firms cannot pursue sustainable development in volatile conditions, and they can attain it only if they develop collaborations with other tourism agents. So reviews literature implies that that small firms should develop connections with tourism firms not only at a local level but also at a global level if they put

the goal to be competitive and if they want to survive in the global environment.

5. Cluster type as a factor that defines level of networking

According to debates in previous literature, it is claimed that ‘‘clusters’’ can create some extra advantages, particularly local networks, and, therefore, enhance competitiveness. Literature where the focus of study is a cluster type mainly has two approaches towards the defining factors for the level of networking: agglomeration and specialization.

The research outcomes of reviewed literature show that firms in agglomerated clusters have a higher networked structure than those in non-agglomerated clusters. Although firms in agglomerated clusters show high locally connected network structures, they also feature networks at a global level, and although some of the firms in agglomerated clusters have no connections with other firms, their share is lower than those in non-agglomerated ones.

Previous papers reveal that despite of fact that local networks of firms are high in agglomerated clusters, no significant difference is observed between the level of networks of the agglomerated and non-agglomerated clusters. But also we should take into account that results were different with different clusters, as the content of clusters differs. So we can say that revealing the role of specialization in clusters is important in clarifying the network differentials of firms in the different types of clusters.

Literature reveals that firms in specialized clusters show an individual character in their relations because of the existence of small firm structures. Specialized clusters which are large and diverse in structure show a high level of networking with global firms. Firms in non-specialized clusters show similar characteristics as those in agglomerated clusters in terms of their networking behaviour. Non-specialized clusters include not only small firms but also medium and large tourism firms, and thereby can have a fluctuating structure in the level of networking. Most papers claim that specialization in tourism clusters is not a determining factor when it is to be defined global or local connectivity. However some papers have evidences that the only factor that defines the level of networking in that cluster is the existence of large and small tourism firms. Literature emphasizes (Amin & Thrift, 1994; Cooke, 1997; Koschatzky, 2000; Schmitz, 1999) that

agglomeration in a cluster provides an opportunity to develop local connectivity in some cases, being only locally connected may be an obstacle to development, as a lock-in effect in clusters may emerge. In this regard, developing global networks as well as local networks is a necessity if a tourism destination is to maintain competitiveness in the global market, and it seems that the development of large tourism firms in clusters has a steering and triggering role for enhancing the global level of connectivity of that cluster.

6. Conclusion

As destination competitiveness becomes more and more critical in the global economy, defining how networking relationships are organized and reinforced at local and global levels in tourism clustersand firms has become crucial when evaluating their competitiveness. In this paper, we made an attempt to review existing views, concepts through analyzing the literature on main concepts of clusters for tourism industry. Most of reviewed papers are agree in the importance of local and global networks in firms and clusters.Global linkages increase greatly for large firms, and increasing a firm's size produces a reduction in local links. We concluded that large tourism firms that are more active in developing global networks rather than small- and medium-sized firms because of the awareness about the fact that global networks are crucial for attracting tourists. We assume that the necessity for high-quality service and a coordinated global marketing strategy are the main factors triggering the strong global linkages of large tourism firms, allowing competitively in the global market. Actually, it looks it is a natural consequence of firms increasing their turnover and market size, and, therefore, becoming more global in their stance, objective and adaptation. Several studies on different samples show that small firms seem to be reluctant to develop networking with other tourism firms, even within their own cluster. In most cases it is because of the existing individual character of the firms and a lack of knowledge of the potential benefits of networking whichcoincides with the reviewed theories. In general, small firms lack resources such as time, staff, finance and opportunity, and, therefore, need to develop inter-firm networking in order to pursue development in their sensitive conditions.

Although the general findings related with cluster type do not give a clear indication of the level of

development in the networks, being agglomerated (or not) and specialized (or not) may have diverse effects on the existence of networking. Based on studied papers we find that agglomeration triggers the development of networking in a cluster. It is known that ‘‘there is a necessity not only to develop local networks, but also to develop global networks’’. To support the development of a tourism cluster as a global node via local networks, there is a need to combine local networks with global ones by increasing the connection between large and small firms. Reviewed literature that there is an emerging discussions on networking, especially related to tourism activities, but they are mainly theoretical, and only limited number of empirical studies that define them exist. We can conclude that networking practices in tourism have been moved ahead, but studies that generate them are emerging quite rare. Because of it there is a need to conduct more case studies based on quantitative analysis in order to confront theory with practical evidence. Here we need to mention that particularly in this industry data collection is very difficult. Especially, interdependence techniques and network analyses, which provide better data than other techniques, must be taken into consideration in order to promote the development of more realistic theories and policies related to networking relationships. Future studies need to focus on special issues related with networking relations and the factors that generate networking, with the aim to provide inputs for tourism agents, planners, and academicians who are interested in how networking at local and global levels can contribute to gain competitive advantage in tourism.

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