

ISSN 2076-1333

Міністерство освіти і науки України
Харківський національний університет імені В.Н. Каразіна

ЧАСОПИС

СОЦІАЛЬНО-ЕКОНОМІЧНОЇ ГЕОГРАФІЇ

ВИПУСК 26

Заснований 2005 року

Харків
2019

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Автори опублікованих матеріалів несуть повну відповідальність за підбір, точність наведених фактів, власних імен тощо.

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Свідоцтво про державну реєстрацію КВ № 10768 від 21.12.2005.

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UDC 911.3: 338.47:656.1/.5](479.22)

DOI: 10.26565/2076-1333-2019-26-01

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METHODOLOGICAL APPROACH FOR LAND TRANSPORT RESEARCH AND ITS IMPORTANCE FOR GEORGIA'S SPATIAL ARRANGEMENT

The purpose of this article is to show the place of Georgian land transport in spatial development, in its economic development and future perspectives, with methodological approach. The topic was chosen due to its actuality. Decline in amounts of freight and passenger shows that country is not so attractive to be part of any international transport corridor. To overcome the problem, we should know cause of it and the whole process of development, showing the factors which have influenced on the current result.

The aim and novelty of the article is research of human geographical aspects of modern Georgian land transport, which covers the following objectives and issues: analyze existed modern literature around Georgian land transport, find and explain causes and consequences compare current trends with past and setting the perspectives.

Examining Georgian land transport will be good example for understanding Caucasian transport corridor in order to connect it with international transport corridors and benefit for local economic growth. Being part of international trading systems is key to Georgia's geopolitical location. According to current international economic environment and land transport's infrastructural and economic regress there are several questions how can it be part of international transport corridor. Comparing with EU reforms and study of Chinese transport connections towards European countries will give some answers.

Keywords: Caucasus, land transport, Georgia, methodology, international transport corridor, Georgian railway, geoeconomy, geopolitics.

Нодар Елізбарашвілі, Давіт Сідамонідзе, Нана Дейсадзе. МЕТОДОЛОГІЧНИЙ ПІДХІД ДО ДОСЛІДЖЕННЯ НАЗЕМНОГО ТРАНСПОРТУ ТА ЙОГО ЗНАЧЕННЯ ДЛЯ ПРОСТОРОВОГО РОЗВИТКУ ГРУЗІЇ

Метою даної статті є показати роль наземного транспорту Грузії у просторовому розвитку країни, а також описати економічний розвиток і майбутні перспективи транспортної системи за допомогою методологічного підходу. Тема була обрана у зв'язку з її актуальністю. Зниження обсягів вантажних і пасажирських перевезень показує, що країна не настільки приваблива, щоб бути частиною будь-якого міжнародного транспортного коридору. Щоб вирішити цю проблему, ми повинні знати причину її виникнення і весь процес розвитку, показуючи фактори, які вплинули на поточний результат.

Метою і новизною статті є дослідження географічних аспектів сучасного наземного транспорту Грузії, яке охоплює такі завдання і проблеми: аналіз існуючої сучасної літератури з наземного транспорту Грузії, пошук і пояснення причин та наслідків географічних змін, порівняння минулих і поточних тенденцій і встановлення нових перспектив. У цій статті в якості методології дослідження використовується системний підхід. Представлена робота заснована на огляді літератури та аналізі вторинних даних. Літературні і вторинні дані були зібрані з використанням ручних пошукових і електронних пошукових систем і наукових електронних баз даних (Jstor, EBSCO).

Вивчення наземного транспорту Грузії буде хорошим прикладом для розуміння Кавказького транспортного коридору, щоб пов'язати його з міжнародними транспортними коридорами та отримати вигоду для місцевого економічного зростання. Участь в міжнародних торговельних системах є ключем до геополітичного положення Грузії. У відповідності до сучасної міжнародної економічної ситуації та інфраструктурного й економічного регресу наземного транспорту виникає низка питань, яким чином він може стати частиною міжнародного транспортного коридору. Порівняння з реформами ЄС і вивчення транспортних зв'язків Китаю з європейськими країнами дасть деякі відповіді.

Ключові слова: Кавказ, наземний транспорт, Грузія, методологія, міжнародний транспортний коридор, грузинська залізниця, геоекономіка, геополітика.

Нодар Елишбарашвили, Давит Сидамонидзе, Нана Дейсадзе. МЕТОДОЛОГИЧЕСКИЙ ПОДХОД К ИССЛЕДОВАНИЮ НАЗЕМНОГО ТРАНСПОРТА И ЕГО ЗНАЧЕНИЕ ДЛЯ ПРОСТРАНСТВЕННОГО РАЗВИТИЯ ГРУЗИИ

Целью данной статьи является показать роль наземного транспорта Грузии в пространственном развитии страны, а также описать экономическое развитие и будущие перспективы транспортной системы с помощью методологического подхода. Тема была выбрана в связи с ее актуальностью. Снижение объемов грузовых и пассажирских перевозок показывает, что страна не настолько привлекательна, чтобы быть частью какого-либо международного транспортного коридора. Чтобы решить эту проблему, мы должны знать причину ее возникновения и весь процесс развития, показывая факторы, которые повлияли на текущий результат.

Целью и новизной статьи является исследование географических аспектов современного наземного транспорта Грузии, которое охватывает следующие задачи и проблемы: анализ существующей современной литературы по наземному транспорту Грузии, поиск и объяснение причин и последствий географических изменений, сравнение прошлых и текущих тенденций и установление новых перспектив. В этой статье в качестве методологии исследования используется системный подход. Представленная работа основана на обзоре литературы и анализе вторичных данных. Литературные и вторичные данные были собраны с использованием ручных поисковых и электронных поисковых систем и научных электронных баз данных (Jstor, EBSCO).

Изучение наземного транспорта Грузии будет хорошим примером для понимания Кавказского транспортного коридора, чтобы связать его с международными транспортными коридорами и извлечь выгоду для местного экономического роста. Участие в международных торговых системах является ключом к геополитическому положению Грузии. В соответствии с нынешней международной экономической ситуацией и инфраструктурным и экономическим регрессом наземного транспорта возникает несколько вопросов, каким образом он может стать частью международного транспортного коридора. Сравнение с реформами ЕС и изучение транспортных связей Китая с европейскими странами даст некоторые ответы.

Ключевые слова: Кавказ, наземный транспорт, Грузия, методология, международный транспортный коридор, грузинская железная дорога, геоэкономика, геополитика.

Introduction. In the early twentieth century, George Nathaniel Curzon, India's Vice-King and British Foreign Minister traveled from the west side of the South Caucasus to the East-Batumi-Baku journey. Curzon recalled the Argonauts and added that the richness of the Golden Fleece did not fit into the region, attracting many modern "Argo". Moreover, from this period transport in Georgia has grown more and more.

The development of transport in Georgia during the Soviet period has played an important role in enhanced economic growth of the country, enrichment of its fossil wealth, expansion of economic-geographical relations with other districts, further development of urban centers, etc. The development of the transport network has contributed to the concentration of economic life in individual points and nodes, as well as comparable equally territorial deployment.

In the 21st century, the worldwide globalization process has radically changed the global picture and embraced almost every aspect of social life - economic, social, political, cultural sphere. In the face of globalization processes, the world is increasingly seeking economic integration.

As for today, transport plays an important role in socio-economic development of Georgia and we can attach it to strategic sectors group. The difficult situation created in the transport sector for the objective and subjective reasons arising in the period after the collapse of the Soviet Union and the transition to market economy. To overcome this situation, it will have an important role in developing Georgia as an independent state, developing foreign trade-economic relations and integrating the economy of Georgia with the world economy. Only Georgia has access to the open sea, making deployment by ship, especially into Central Asia, even less feasible. Finally, apart from the vast distances to travel, road and rail transit through the region are further hampered by the poor condition of the infrastructure and the difficult terrain across much of the region [8].

Features and problems of transport development in the South Caucasus. The South Caucasus has a favorable geographic location at the crossroads of Asia, Europe and the Middle East, and the three states have been eager to develop East-West and North-South transport corridors through their territory. Communication links through Iran and Turkey have been developed from scratch, since borders were mainly closed in the Soviet era and little trading took place.

The transport system in Georgia is relatively stable due to various international projects. However, Georgia's road and rail transport systems are, as yet, inadequate to support Georgia's role as a major transit route for trade between Europe and Central Asia. [9] The Caucasus is one of the most natural geopolitical, ecological, religious, ethnic and transport crossroads in the world. The favorable transport and geographical position of the Caucasus is of strategic importance both for the region and for its neighboring and distant neighbors.

This creates great potential for rail, pipeline, air, sea and road transport. However, there are also obstacles to the development of transport: a high level of mountainous terrain, the scale of catastrophic natural phenomena and processes, a high probability of renewed conflicts, an undesirable level of development of communication systems, etc.

The Caucasus is actively involved in the transit of energy. Trade between the growing (Central Asia, Azerbaijan, Iran, North Caucasus) and buyers (Europe) regions, which increases the risk of man-made disasters, as well as on the Black Sea and Caspian waters. The problem of sustainable development of land transport in the South Caucasus is associated with several reasons, the most important of which are:

Historical features of socio-economic development. In recent decades, the transition to a market economy has gradually fostered new and broader economic cooperation. Nevertheless, the influence of the

Soviet period of economic specialization in the Caucasus countries is still important in industry and agriculture. At the beginning of the XXI century, the share of imported products increased sharply, which negatively affected the prospects for the development of local production and contributed to the growth of unemployment.

Agriculture and geography had a significant negative impact. The geographical features of agriculture were associated with the intercontinental belt of the South Caucasus (large settlements) and transport routes that actually destroyed the mountainous areas and created the prerequisites for a demographic crisis.

Modern trends in the development of agriculture. In recent decades, the countries of the South Caucasus have focused on socio-economic processes in the service sector, trade and communications. It is noteworthy that the demand for independent food policy, despite the extensive agriculture, does not provide local needs. Such processes and the situation make it more dependent on localized imported products, which leads to significant changes in the traffic flow [6].

Geopolitical situation and military conflicts. The main obstacles to sustainable development in the South Caucasus are open and limited political conflicts that have led to a number of persistent military conflicts over the past decades. All three regions of the region are in a

state that is reflected in land transport development trends.

Transport Development Trends. The South Caucasus should determine its geopolitical position and natural conditions. It has become an integral part of the Silk Road, a bridge connecting Europe and Central Asia, Russia and the previous Asian transport artery. The Caspian and Black Seas play an important role in the rivers and canals connecting Europe, the Middle East and the countries of Central Asia. Global geopolitical importance is the highway of oil and gas transportation, the intensive use of the history of which has more than one hundred years. Oil and gas flows in the direction East-West (Central Asia-Azerbaijan-Georgia-Turkey-Europe) and North-South (Russia-Georgia-Armenia-Iran). Transportation of pipelines with energy ports increases the risk of environmental safety, which is associated with possible industrial accidents and high seismicity. Increased turnover in the South Caucasus is a prerequisite for pollution of the Black Sea and the Caspian Sea [6].

The analysis of national accounts of Georgia shows that the role of transport and communications in the country's economy is modest compared to other sectors. According to the data of the National Statistics Office of Georgia in 2016, Georgia's Gross Domestic Product (GDP) at current prices was 34028.5 million, GEL. (See table 1. Gross domestic product of Georgia at current prices, million, GEL) [1].

Table 1

Gross domestic product of Georgia at current prices, million, GEL (Georgian Lari);

Gross domestic product of Georgia at current prices, (million, GEL)	2016	2018 (3)
GDP at current prices (million GEL)	34028.5	10586.8
GDP per capita (GEL)	9129.0	2838.8

Source: National statistics office of Georgia

Transport and communications in the sectoral structure of GDP, after industry and trade, are in third place with a share of 10% (See figure 1. GDP by sectors, 2017 y.).

In addition, according to the structure of employment, 10% of the economically active population is employed in the transport and communications sector (See figure 2. Employment by sectors, 2017 y.).

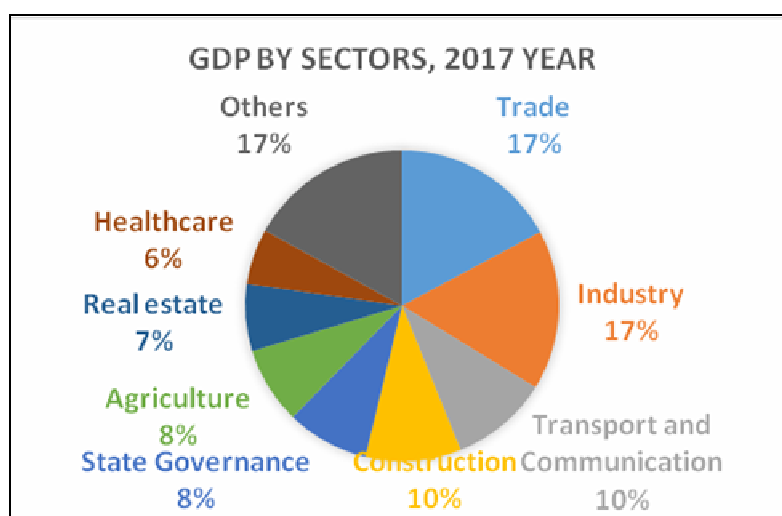


Fig. 1. GDP of Georgia by sectors, 2017 year

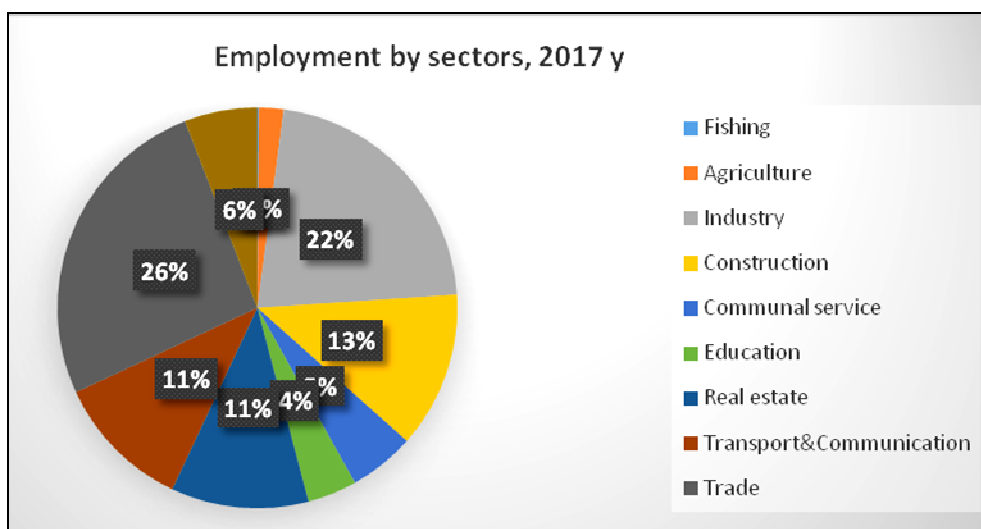


Fig. 2. Employment by sectors, 2017 y.

Analysis of dynamics of the cargo turnover and passenger turnover indicators of the Georgian transport system gives an opportunity to support development of the sector. It is noteworthy that since 2009 the cargo

turnover has been characterized by a downward trend, while the passenger turnover, on the contrary, increases the trend (See table 2. Main indicators of Georgian transport).

Table 2

Main indicators of Georgian Transport, 2017 y.

Year	Cargo shipment, thousand tons	Cargo turnover, mill t / km	Passengers, million man	Passenger, million passengers / km
2001	33241.3	5077.3	364.5	6189.8
2010	48411.4	6848.1	400.2	7418.6
2017	35186.9	3796.1	493.6	9173.0

Source: National statistics office of Georgia

Association Agreement between the European Union and the European Atomic Energy Community and their Member States, of the one part, and Georgia, of the other part was signed in 2014. Due to the agreement Georgia has to implement several changes in legislation and some parts are about transport as well; [2]

Currently the Law of Georgia on Transport Management and Regulation determines the legal and organizational grounds for management and regulation of transport sphere on the territory of Georgia.

The action of the law applies:

- All subjects in the field of transport;
- All vehicles on the territory of Georgia;
- On the Georgian means of transport in another state;
- Unless otherwise specified by the legislation of that State;
- This law does not apply to rail transport, pipelines and their associated infrastructure.

Functions of Department of Transport and Logistics Development Policy of the Ministry of Economy and Sustainable Development of Georgia:

As for land transport, on April 15, 2011 was created a legal entity of public law - "Land Transport Agency" within the Ministry of Economy and Sustainable Development of Georgia [3].

The aim of the agency is to promote the legislation of Georgia, harmonization with the EU countries legisla-

tion, cooperation with international and public organizations and state structures, as well as to facilitate the development of the sector in its international transport organizations and euro structures.

Methodological approach: For this article, a systematic approach is used as a research methodology. The land transport sector is considered as a single system with internal and external factors in complex and dynamic - continuous time and space. Transport is one of the biggest and most important industries in direct and indirect relation to the successful functioning of different sectors of the country [7]. Presented work is based on the review of literature and analysis of secondary data. Literary and secondary data were collected using manually search and electronic search systems and scientific electronic databases (jstor, EBSCO). The literature and secondary documents were searched in two stages: In the first phase, we found scientific literature and secondary documents on general transport, types of land transport, transportation of Georgia, and in the second stage, to find secondary relevant government documents. For comparison, we have selected the last of the Soviet Union and since 1986 -2018, (periods are chosen to make comparative analysis).

The following key terms were used as search engines: transport, transport types, land transport, Soviet transport, transport, railroad, pipeline, economy, and freight turnover, transport network, etc.

The following types of literature and secondary documents were found:

- ✓ Scientific papers on land transport development;
- ✓ International legal documents;
- ✓ Government documents and statistics of Georgia.

The literature and secondary data obtained within the research have been analyzed using the descriptive, structural and comparative analysis approaches. In analyzing the system of time and space, the advantages are given to Desk Research, which allows the phenomenon to be more visible [4]. Using the method of analysis, the fact is that the study of the documents should be taken into consideration with other factors identified at the same time. This method of research is selected based on the advantages that documentary research is useful for recurring analysis in time, as it shows how the situation evolves over time. In addition, when using the method of analyzing the documents, the importance of the basic criteria (authenticity, accuracy, legitimacy, importance) of the validity and reliability of the document is used.

For a comprehensive study of the situation in the direction of transport infrastructure, in the process of research, the qualitative research method is used - "Polling Experts". Respondents were selected for surveying the experts based on the non-profit target selection, taking into account the pre-defined criteria. One of the methods used in the study is also geographic information systems that are based on a computer-based computer system and provide a good way to track, analyze, and present spatial data. The maps from the visuals presented in the work are drawn up by the author's geo-information systems. Different programs are used for the rest of them: Excel, Illustrator, and Developer of Infographics.

The research database is prepared:

- Legal acts and statistical data;
- Statistical and transport companies internal accounts;
- The survey conducted by the state and non-governmental organizations.

Within the scope of the survey, public information has been requested from different departments of the central government. Based on the obtained information, the priorities of land transport, implemented and planned projects are estimated; Based on the research's goal, analyzes both the latest and the previous years.

In order to achieve the goal, the strategy is as follows: The research will use both quantitative and qualitative research methods. Using mixed research methods allows for enrichment and correct conclusions. After examining the question and the problem, there will be an in-depth study of existing literature that will reveal the various shortcomings in scientific knowledge, tendencies and attitudes to the dominant considerations in the matter. Literature will be obtained from existing scientific electronic and non-magazines as well as international organizations, nongovernmental organizations, archives of the state agencies, from the international financial institutions working on the issue with in-depth interviews with experts working on this issue. Based on the analysis of the information collected, the main circum-

stances will be analyzed, which will help us answer our questions.

The article uses a pragmatic philosophical worldview, which can be explained by the following:

Pragmatic vision is not just a type of research approach - it is important for him to study the problem and use all methods and means; the reason why pragmatic vision is the main approach of research is that this approach allows more freedom and lavishness in the research process. While we talk about the prospects of development of land transport, which depends on a lot of political will, the choice of the country and the decision-makers, etc. It is necessary to be strongly focused on the problem of research and use all means to study it. The issue is quite wide and varied, and for me as a researcher, it is necessary to have full freedom of action, because it may be necessary to use different research methods simultaneously. This must be added to the fact that obtaining information is difficult with the information deficit. Consequently, research cannot be limited to any narrow, straightforward philosophical outlook, which strictly sets one goal and the only way to achieve this goal.

This work is based on the objectives of a certain scientific value, since the study of land transport, besides the practical use of scientific-practical significance. This interest is related to the geo-geological and geopolitical role of land transport, the global and regional (Caucasus, Central Asia, Europe and Middle East), its contribution to the budget, employment structure, infrastructural projects, links terminals, military importance, ecology etc.

Land transport can be considered in the example of Switzerland – in terms of prospects of development of mountainous areas, for which it is essentially a spatial development from Tbilisi and Kutaisi. Study of volume of shipping according to geographical directions. As already mentioned, this issue is first studied at the doctoral level after studying independence. It will be interesting to compare the comparative analysis. Kverenchkhiladze "Georgian Transport". Comparison allows us to fill in empty places in literature. In general, the written work on land transport can be given the following scientific value:

1. Be a research analytical document on the role of land transport as one of the fields of economic geography of Georgia in the country's farm;
2. Be a similar document for determination of its significance in the geo-economy of Armenia and Azerbaijan (separately); As well as for the importance and development of the South Caucasus as an international transit-transport corridor for the assessment of its role (meaning for the neighbors of Central Asia and Eastern Europe);
3. Display the priorities and challenges of the field. Therefore, define a strategy to overcome real problems in order to become competing and competing with other types of competitive transportation.
4. Determine the maximum capacity of the sector development at all levels (locally), immediate and close neighboring countries (regional level) and Eurasian continent (globally) and give us an understanding of these capabilities.

5. Be a research based real-time document for future strategic development of Georgia's land transport.

One of the methods used in the study, as well as geographical information systems for transportation (GIS-T), is a comprehensive information system that

specializes in the introduction, storage, manipulation, analysis and reporting of geographic / spatial information. GIS can be used for transportation issues, including problems. The GIS's four main components are coding, management, analysis and reporting.



Fig. 3. Railroad map of Georgia, as an example for land transport (created by authors)

Overview Spatial Interactions Overview The geographical methodology is of particular importance for transporting the methodology to report spatial interaction between places to assess demand (current or potential) for transport services.

In the paper, it is possible to use the following theories:

- Graphic /diagram theory – is the mathematical branching, which implies network encoding and measurement of their compositions.
- Location Theory – theory, which relates to geographical location of economic activity, is an essential part of economic geography, regional sciences and spatial economy. Location theory answers questions about which economic activities are located and why. It can be compared to the theoretical industrial location of the Webber. Alfred Weber has established the industrial location theory where the enterprise is located where the cost of raw material and final product transportation is minimal.
- Central Place Theory – seeks to find the connection between the cities of the region according to size, volume and geographical distribution. The majority of urban systems have a well-formed hierarchy,

where several centers dominate. Transportation is of utmost importance, given the distinction of the distance, which is based on the idea that the distance requires time, resources and energy to be overcome. The theory of transportation in the territorial structure according to the theory is due to the efficiency of the price.

- Transport corridors as a theoretical approach. They are the accumulation of infrared and infrastructural nodes; their development is related to economics, infrastructural and technological processes. When the process relates to urban development, urban corridors are the city's axis system developed mainly in the wetlands or coastal areas. Many urban areas, such as Boston-Washington and Tokyo-Osaka, have similar characteristics.

Results. In modern conditions, in relation to the scientific-technical revolution, substantial changes in the improvement of transport means followed by changes in transport geography. Social-territorial division of labor between the regions and countries will further increase, according to the scale of economic development. This is primarily reflected on the transport. Therefore, the geography of transport will occupy one of the leading places

in the economic-geographical scientific disciplines, along with the railway transport.

Scientific News:

1. The modern complex geographical study of the land transport system of Georgia was carried out.
2. Based on analysis of literature dedicated to land transport systems and personal experience, the parameters of the performance system of the transport were established.
3. The methodology and the relevant procedures of the complex approach of the research have been developed, through which the comparative analysis of the Soviet period was first conducted.
4. Analysis of the issue of environmental pollution by transport was carried out.

Practical meaning of the work:

- The work will be collected by governmental structures and experts to develop the country's transport policy.
- Conclusions and major findings of the work may be the basis for making various administrative decisions
- The dissertation materials will help the state and departmental institutions to determine the country's socio-economic development

- Results obtained by us may be used for detailed study of road and other land transport systems in other countries and regions for their comparative analysis, classification and rankings.
- Land transport facilities administrations will assist in studying the parameters of competitive fields and planning policy.
- Material can be used in all three stages of study in the study process.

In conclusion: We may say that economic growth and sustainable development of Georgia largely depends on the effective use of its potential as transit territory. The use of transit function for Georgia was set after the collapse of the Soviet Union, since the 1990s.

The development of Georgian land transport in the future should be carried out by reducing state labor costs for the transport and economic process. This can be achieved with the right location between different modes of transport and a sharp improvement in their use. The improvement of technical and economic indicators of the work of land transport is one of the most important tasks for the further development of the economy of Georgia and its spatial arrangement, which is possible to be explored by different methodological approaches.

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Надійшла до редколегії 15.04.2019 р.

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UDC 911.3:303.6

DOI: 10.26565/2076-1333-2019-26-02

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**SOCIOLOGICAL METHODS IN HUMAN-GEOGRAPHIC RESEARCHES:
FEATURES OF APPLICATION**

Human geography, which is an integral branch of contemporary geographical science, relies on a broad methodological basis, using both the general geographical methodological apparatus and the methodological apparatus of related and related sciences. However, taking into account the specifics of the object-subject field of human geography, it is necessary to improve the methodological apparatus, going beyond the use of methods inherent only in geographical science. The anthropogenic factor becomes dominant in all negative changes in the interaction of the “society-human-nature” system. There is a need to replenish the methodological apparatus of human geography through the use of methods of related sciences, in particular, sociology. Sociological methods operate with large amounts of data and can be applied at various stages of socio-geographical research: at the stage of collecting information, its processing and interpretation. Among Ukrainian scientists, human geographers, for now, the use of sociological methods of collecting and processing information is more ignored, unlike foreign scientists.

The use of traditional socio-geographical methods and ignoring the methods of related sciences indicate the need for a thorough review of the methodological and methodological foundations of socio-geographical research. This is required by the complexity of the global processes of socio-economic development of modern civilization as a single global socio-geographic system of the planet. At the stage of collecting socio-geographical information, it is important to use sociological methods of collecting information that are indispensable for the study of those features of geographical systems that are not covered by official statistics, as well as for the study of factors of processes and phenomena at the individual and group levels.

Sociological research methods have a branched structure, in which they are distinguished as general scientific and special sociological research methods. Sociological methods of data collection can be used in socio-geographical studies, the choice of which depends on the type of goals, objectives, features of the object of study, the material capabilities of the researcher and the capabilities of the toolkit. Sociological methods for collecting information are divided into 5 main classes: survey, analysis of documents, experiment, observation and testing.

Keywords: sociological methods, methods of collecting information, survey, questioning, interviews, human-geography researches.

Людмила Немець, Марина Логвинова, Ольга Суптелю. СОЦІОЛОГІЧНІ МЕТОДИ В СУСПІЛЬНО-ГЕОГРАФІЧНИХ ДОСЛІДЖЕННЯХ: ОСОБЛИВОСТІ ЗАСТОСУВАННЯ

Мета дослідження – аналіз існуючих соціологічних методів збору інформації та їх адаптація до суспільно-географічних досліджень. Враховуючи майже повне ігнорування соціологічних методів збору інформації з боку провідних українських суспільних географів, надання переваги офіційним статистичним ресурсам, які не дають конкретної відповіді про причинно-наслідкові зв'язки виникнення та розвитку суспільно-географічних процесів і явищ, аналізуючи відповідний зарубіжний досвід таких досліджень, наголошуємо на необхідності проведення досліджень з урахуванням методичного апарату соціологічних дисциплін. Оскільки суспільні процеси і явища складні, багатоваріантні, форми їх прояву різноманітні, то можливість об'єктивного вивчення суспільних явищ і отримання відповідних результатів в значній мірі обумовлені достовірністю і якістю зібраного матеріалу. У суспільно-географічних дослідженнях можуть використовуватись соціологічні методи збору даних, вибір яких залежить від типу, цілей, завдань, особливостей об'єкту дослідження, матеріальних можливостей дослідника та можливостей інструментарію.

Авторами розглянуто та вдосконалено класифікації соціологічних методів збору інформації, проаналізовано 5 основних класів соціологічних методів збору інформації: опитування, аналіз документів, експеримент, спостереження та тестування. Розглянуто конкретне застосування соціологічних методів збору інформації при вивченні внутрішньо переміщених осіб в Україні, що дозволяє вивчити окремі психологічні особливості переселення або групи переселенців, їх взаємодію з іншими ВПО та місцевим населенням, проблеми, які виникають перед внутрішньо переміщеними особами та заважають успішній інтеграції у приймаючі громади тощо, тобто ті характеристики, які неможливо виділити за допомогою офіційної статистики. Авторами розроблена анкета для проведення структурованого інтерв'ю з внутрішньо переміщеними особами. Наголошено на необхідності більш широкого використання соціологічних методів збору інформації у суспільно-географічних дослідженнях, це дозволяє підвищити гуманітарно-соціальну складову дослідження.

Ключові слова: соціологічні методи, методи збору даних, опитування, анкетування, інтерв'ю, суспільно-географічні дослідження.

Людмила Немец, Марина Логвинова, Ольга Сунтело. СОЦИОЛОГИЧЕСКИЕ МЕТОДЫ В ОБЩЕСТВЕННО-ГЕОГРАФИЧЕСКИХ ИССЛЕДОВАНИЯХ: ОСОБЕННОСТИ ПРИМЕНЕНИЯ

Цель исследования – анализ существующих социологических методов сбора информации и их адаптация к общественно-географическим исследованиям. Учитывая почти полное игнорирование социологических методов сбора информации со стороны ведущих украинских общественных географов, предпочтения официальным статистическим ресурсам, которые не дают конкретного ответа о причинно-следственных связях возникновения и развития общественно-географических процессов и явлений, анализируя соответствующий зарубежный опыт таких исследований, отмечаем необходимость проведения исследований с учетом методического аппарата социологических дисциплин. Поскольку общественные процессы и явления сложные, многовариантные, формы их проявления разнообразны, то возможность объективного изучения общественных явлений и получение соответствующих результатов в значительной степени обусловлены достоверностью и качеством собранного материала. В общественно-географических исследованиях могут использоваться социологические методы сбора данных, выбор которых зависит от типа, целей, задач, особенностей объекта исследования, материальных возможностей исследователя и возможностей инструментария.

Авторами рассмотрены и усовершенствованы классификации социологических методов сбора информации, проанализированы 5 основных классов социологических методов сбора информации: опрос, анализ документов, эксперимент, наблюдение и тестирование. Рассмотрено конкретное применение социологических методов сбора информации при изучении внутренне перемещенных лиц в Украине, что позволяет изучить отдельные психологические особенности переселенца или группы переселенцев, их взаимодействие с другими ВПЛ и местным населением, проблемы, которые возникают перед внутренне перемещенными лицами и мешают успешной интеграции в принимающие общества и тому подобное, то есть те характеристики, которые невозможно выделить при помощи официальной статистики. Авторами разработана анкета для проведения структурированного интервью с внутренне перемещенными лицами. Отмечена необходимость более широкого использования социологических методов сбора информации в общественно-географических исследованиях, это позволяет повысить гуманитарно-социальную составляющую исследования.

Ключевые слова: социологические методы, методы сбора информации, опрос, анкетирование, интервью, общественно-географические исследования.

Formulation of the problem. Human geography, which is an integral part of contemporary geographic science, relies on a broad methodological base, using both the general geographic methodological apparatus and the methodological apparatus of related and related sciences. In this context, it is interesting to note that human geography has a humanitarian orientation, while related humanities, such as sociology and anthropology, do not have such widespread use. This, of course, is associated with the strong influence of materialist orientations in geography, which hindered the development of interpretive traditions in this area [32]. However, in view of the specifics of the object-subject domain of human geography, the improvement of the methodological apparatus is necessary, going beyond the limits of the use of methods that are inherent only in geographic science.

The properties of social, socio-geographical systems and society as a whole, as an object of study of human geography, are characterized by dynamic features, periodic phase transitions, changes in the priorities of society, crisis phenomena, a high level of social mobility, the presence of structural components that provoke contradictions and create conflict situations. These systems are influenced by external and internal factors that bring additional disturbances into society, therefore it is necessary to take into account the above-mentioned features of modern society. This requires the search for new approaches and methods, their integrated application in human geography researches. The relevance of this scientific article is also due to the change in the vector of research of social geography from the definition of territorial features of development, with an emphasis not only on the economic potential, but also on the identification of various properties of society, and its impact on the relevant territory. After all, it is the anthropogenic factor that becomes dominant in all negative changes in the interaction of the “society-human-nature” system. There is a need to replenish the

methodological apparatus of human geography through the use of methods of related sciences, in particular, sociology. Sociological methods operate with large amounts of data and can be applied at various stages of human geography researches: at the stage of collecting information, its processing and interpretation. This study reveals the peculiarities of using sociological methods of collecting information in human geography researches.

Analysis of previous research and publications.

Human geography is a complex science that has the goal of the fullest possible study of society, which is open and dynamic, therefore the set of methods used by it is constantly transformed. So in 1985, Eliot Hurst noted that human geography is more a sociological science than a geographical and its methodological apparatus should already be integrated with a sociological [29]. According to Ley, research using sociological methods is aimed at understanding the actions and intentions of people, the content of events and opportunities they face in their everyday lives [30]. At the same time, David Harvey, who is actively exploring cities and social justice, emphasizes that apart from identifying social processes, their causes and patterns, the spatial component should not be neglected. This he called “geographical imagination” [28].

At the same time, Robin Flowerdew and David Martin, in the book *Methods in Human Geography* (2005), emphasize that human geography is a symbiosis in the study of the properties of society, of people's thoughts, of social relations and of the spatial component (“geographical imagination”). The authors argue that pure sociological or geographic research does not make sense. Since society at this stage of development is a key factor in the development of the territory, then an analysis of public opinion is important, while it is inadmissible to ignore the spatial component [Methods in human geography]. J. Baxter and J. Eyles, considering qualitative socio-geographical research, also emphasize the necessity of using a complex of methods of different

sciences, but the use of these methods should be well-grounded, which is especially relevant to sociological methods at the stage of information gathering. The authors suggest an example of a deep interview, emphasizing that the choice of respondents should be careful [25].

L. Philip, considering the potential of the approach to using different methods in human geography, emphasizes sociological methods in social studies, which have so far been neglected in geographic literature, emphasizing the need to combine qualitative and quantitative methods [31].

G. Clark emphasizes that the main difference between economists and geographers is the value that the former provides to stylized facts, and the very different meaning that the latter provide to the diversity of economic life. Offering an alternative to the theory of stylized facts, noting the relationship between theory and empiricism, the author notes that human geographers should take the point of view of the studied subjects and objects that are theoretically justified. Regarding data used in research, Clark notes that collecting data, the researcher should take the position of a strict sociologist [26].

In the writings of Ukrainian scholars, polarization of thought about the system of methods of human geography is clearly traceable. According to O. Shablii, the latest period in the development of human geography is increasingly affected by sociologization and humanization [24], and therefore, the research methods used by it are borrowed and adapted from sociological and other humanities. However, the scientist also emphasizes the use of economic methods, in particular: the balance method, industry and interbranch method, the method of energy cycles, the method of economic and socio-economic zoning, and other derivative methods of economics.

A. Topchiev shares the views of O. Shablii on the transformation of the system of methods of human geography. The researcher draws attention to the fact that the present stage of development of socio-geographical science differs from previous massive applications of geoinformation technologies and increased integration of geographic sciences with sociological and economic sciences [21]. However, among the methods used by contemporary human geography, the emphasis has also been shifted to the economic component, and among the list of sources of information, the focus is on statistical information obtained from the departments of statistics and governing structures [21].

The researcher of the features of spatial analysis in human geography K. Niemets draws attention to the inseparability of the spatial component in socio-geographical research. At the same time, the scientist attaches great importance to social processes; however, K. Niemets names the mathematical and statistical methods as the main methods of their research, ignoring the social component [13].

In general, it can be concluded that among Ukrainian human geographers, so far, the use of sociological methods of collecting and processing information is more ignored, unlike foreign scientists.

Qualitative methods in human geography, in particular sociological, to a certain extent, are presented in the book *Social Geography*, edited by L. Niemets and K. Mezentssev in 2019 [14]. The authors emphasize the complex structure of contemporary human geography, which in turn leads to a complication of the system of methods that it uses. In general, the methods used in human geography are divided by authors into quantitative and qualitative. The first group includes all methods that provide for the analysis of empirical studies with significant arrays of statistical data. And to the group of qualitative methods – those aimed at the analysis of non-numerical data, and which can provide a subjective characteristic of socio-geographical objects. The basis of qualitative methods in this case are sociological and general scientific methods adapted to the needs of human geography. For example, there are such methods as: interviews, interviews, focus groups, the method of included observation, document analysis [14].

An example of the practical use of sociological methods in human geography is the work of M. Myrosh “Methodology of socio-geographical study of political activity of the population of the region”. In it, sociological methods, such as surveys and questionnaires, are used to analyze electoral preferences [10].

I. Savchenko, O. Shevchuk believe that sociological methods are mandatory in the study of territorial-political systems, because they prefer such a method as content analysis. The essence of this technique is to find information by specific words, phrases (so-called “semantic units”), which enables, first of all, to reveal the fullness of the space by the object of the search [19].

A certain attempt to generalize the methodology of geographic research is made by M. Saliuk, who considers the methodology of studying documents and sociological polls of the population as sources of geographic information, quantitative methods in geography, etc. The author examines the notion of sociological research, the stage of the process of sociological survey and develops a questionnaire for a sociological survey [20].

Identification of previously unsettled parts of the general problem. The use of traditional socio-geographical methods and the ignoring of the methods of related sciences indicate the need for a thorough review of the methodological foundations of socio-geographical research. This is necessary, given the complexity of global processes of socio-economic development of modern civilization as the only global sociogeosystem of the planet [15]. Manifestations of aggression, terrorism, and other threatening processes in different parts of the world require the consideration and study of social aspects, negative features of the global society as a whole and its individual components. Identifying the features of society at all its hierarchical levels from local to global is an extraordinary task of human geography. Human becomes the main force and the main cause of most of the disasters on the planet. It is necessary to combine the achievements of sociology and human geography to study these issues and find ways to solve global problems of humanity.

Human geography, especially its social field, has the potential and should explore such new challenges to science. This requires revision of theoretical and methodological principles of human geography. Its must be based on the generally accepted theoretical and methodological basis of human geography, but taking into account the methodological techniques of related sciences. Therefore, an important task is to create a toolkit for research: specific methods and algorithms; systems of principles, methods and indicators; forecasting tools. At the stage of collecting socio-geographical information, it is important to use sociological methods for collecting information that are indispensable for the study of those features of geographical systems that are not covered by official statistics, as well as for the study of factors of processes and phenomena at the individual and group levels. Therefore, we consider it expedient to create a systematization of sociological methods for collecting information, outline the advantages of using these methods in socio-geographical research, and also adapt these methods in accordance with the object of research.

Formulating the purpose of the article. The purpose of the study is to analyze existing sociological methods of information gathering and their adaptation and use in human geography researches. Achieving the purpose of the study contributes to the formulation of research questions: what is the place of sociological methods in the methodological apparatus of social geography? Why is it necessary to use sociological methods in human geography and what exactly? The object of research is the sociological methods of collecting socio-geographical information. The subject of the study is the peculiarities of the use of sociological methods for gathering information in human geography.

Presentation of the main research material. It is common knowledge that the methodology is understood as a set of principles, approaches that allow the realization of research intentions. The term "methodology" is derived from the Greek *methodos* – a way of knowing and *logos* – a teaching, a word. The methodology has three main interpretations: methodology is a science of the way of knowledge; methodology – a set of general principles, provisions and methods that form the basis of this science; methodology – a set of methods of research used in this science [11].

The main element of the methodology is the research methods (fig. 1). The method of research is a peculiar architecture of science, the main purpose of which is to obtain reliable knowledge, using the tool of knowledge and reality [6].

Sociological research methods have a branched structure, in which they are distinguished as general scientific and special sociological research methods. In sociogeographical research sociological methods of data collection can be used, the choice of which depends on the type, goals, tasks, features of the object of research, material resources of the researcher and the capabilities of the toolkit [3].

Experience shows that the methodological problems of using sociological methods in human geography are due to their peculiarity of application, the need to use theoretical concepts of sociology, means of analysis and

synthesis; compulsory conceptualization of empirical data and conclusions.

Methods of collecting sociological information of a specific human geography study serve as an instrument that ensures the obtaining of primary data in the course of this study, while taking into account not only the research objectives and objectives, but also the subject-object area of research, which sometimes impose restrictions on the way of obtaining information etc. (tab. 1). Sociological methods for collecting information are divided into 5 main classes: surveys, document analysis, experiment, observation and testing [18].

Observation – a method of collecting sociological information, in which there is a direct visual or auditory perception of real events and their registration. Observation may be occasional, systematic, field, laboratory, included, unincluded, controlled, uncontrolled, structured, unstructured [3]. The most complete method can be used in the study of public spaces of cities. For example, observing urban public spaces can provide an opportunity to determine the saturation of public spaces with objects necessary for communication, leisure, recreation and entertainment; characterize visitors of the public space by age, gender, social status; analyze the intensity of use and segmentation of public spaces in relation to different types of activities.

Document analysis – a way to obtain information through access to documents. The methods of document analysis are extremely diverse, however, two basic types of analysis are quite clearly distinguished among them: traditional and formalized (quantitative), complementing each other [1]. Traditional (classical) analysis is a chain of logical operations aimed at interpreting data in accordance with the purpose of the study. This analysis is directed deep into the document, to the full "exhaustion" of its contents. The main drawback of this analysis is the subjectivity of the approach of the researcher.

Qualitative analysis of documents is a prerequisite for all quantitative operations aimed at releasing a researcher of subjectivity. The main procedures of content analysis are related to the transfer of quality information into the language of numbers [18].

Testing – a method of measuring and assessing the psychological qualities and states of the subject. Testing can be group (sociometric), individual, direct, projected. [3]. *Sociometry* – the theory of measuring interpersonal relationships, the method of studying intra-group relationships and hierarchies in small groups. A modified version of sociometry can also be used to study larger groups, for example, organizations or groups of the population. Sociometry is an applied method both in psychology (social psychology, psychotherapy), and in sociology. A significant disadvantage of sociometry is that it can only be investigated by already established groups. To create new teams you need to use other methods.

Another method of data collection is an *experiment* – a method of knowing social reality, through which the phenomena of reality are investigated in controlled conditions [3].

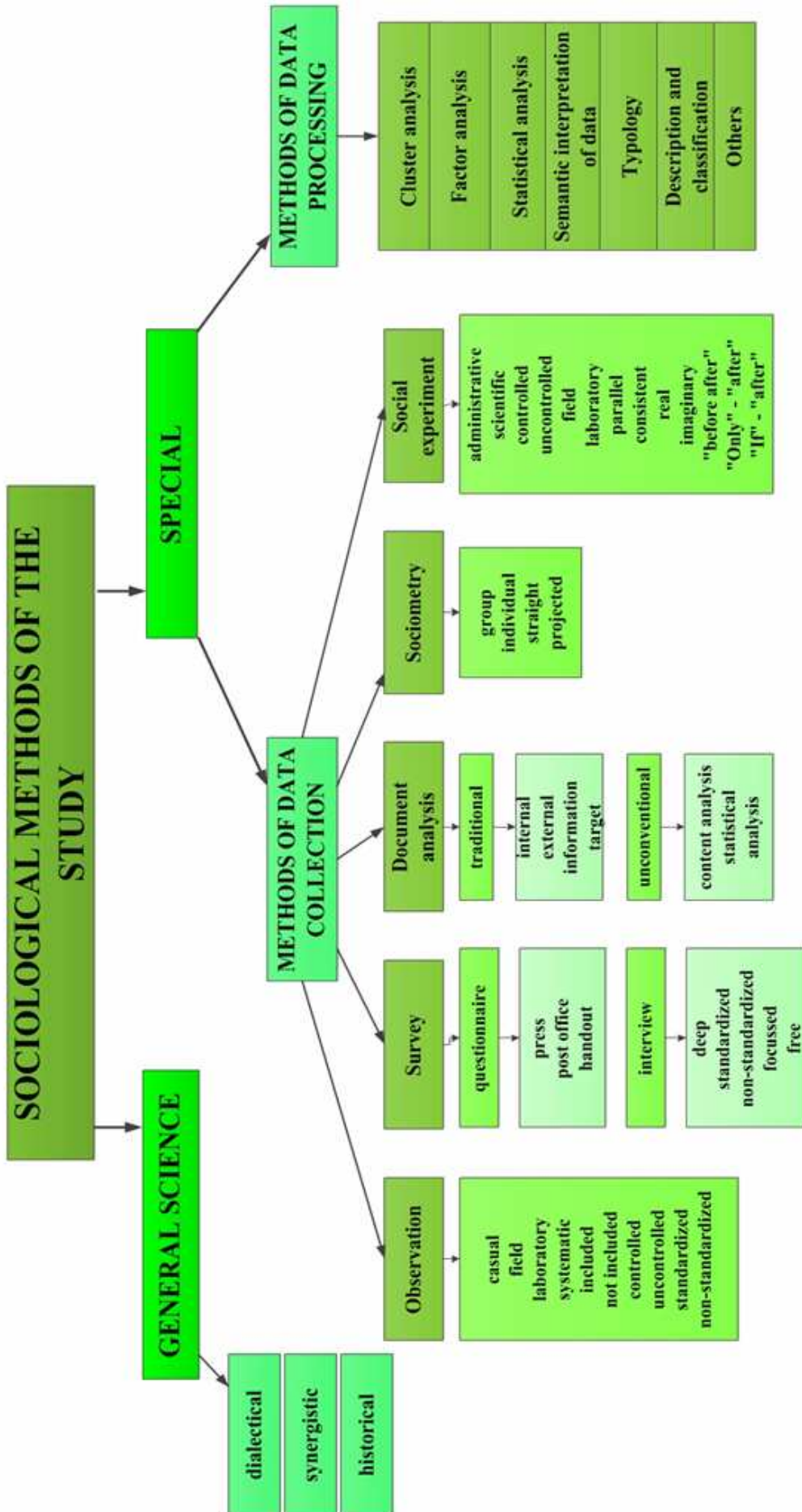


Fig. 1. Classification of sociological research methods (supplemented by the authors for [3, 18])

Table 1

Sociological methods for collecting socio geographical information (compiled by authors)

Name of the method	Features of application in human geography	Advantages of using in socio geographical research	Example of application in human geography
Observation	The method is the oldest and most traditional in science, allows direct contact with the object of research. Considering of the object-subject area of human geography science, this method can be both an independent tool of research, and used in the complex. In domestic science, this method is used as an auxiliary, he does not pay much attention. However, observation can give a holistic understanding in the study of sociogeosystems.	The main advantage of this method is the close proximity of the researcher to the object being studied. The benefits include cheapness, flexibility and ease of use and adaptation to any research object. This method can provide information that can not be obtained through other quantitative and qualitative methods, given the speed and dynamism of all processes taking place in society.	Transformation of the urban space. Development and functioning of public spaces. Impact of economic, social and other processes on the development of the territory.
Survey	This method also allows direct contact with the subject of the study. Statistical data do not fully reflect the state of society development, social opinion is important. The survey method provides an opportunity to identify those social and social components that influence the development of territory and society. However, for this method, careful selection and grouping of respondents is important for the identification of the most objective result.	The main advantage of this method is the possibility of revealing public opinion and the attitude of the population towards the processes occurring in a certain territory. This method provides an opportunity for mass research and is flexible and easy to use.	Electoral preferences of the population. Population Identity Research. Perception studies of the territory. Study of social problems and disadvantages. Problems of Internally Displaced Persons (IDPs).
Document analysis	The method of document analysis in human geography studies allows to evaluate the subjective opinion of their authors, and given the multifaceted nature of the object of research in social geography, this is quite important. This method involves work with both current publications and archives, which allows conducting a retrospective analysis. However, there is no direct contact with the object of the study, and the result depends on the objectivity of the researcher and the completeness of the available documents.	The advantages of this method are its stationary and stability, which allows multiple use. Also, this method allows us to critically evaluate our own research by comparing it with existing data.	Retrospective analysis of the territory development. Different kinds of theoretical and methodological research. Detection of influence of historical events on spatial changes, etc.
Sociometry	The heterogeneity of society is one of the threats to its stable development and requires the study of both the causes of such segregation and relations in these groups and between them. The sociometric method allows revealing these features, because it combines the method of questioning and experiment. Allows direct contact with the object of the study, as the data is provided by the direct participants of the events.	This method allows to identify personal reasons for the formation of segregated groups of people, their mood within them and to assess the threats associated with it.	Investigation of special segregated territories of cities. IDP adaptation processes. Features of the emergence and functioning of territories of compact residence of national minorities.
Social experiment	This method is unique, since it allows you not only to explore the object, but also to influence it, its structure and interaction with other objects. At the same time, the method is quite flexible, but allows the change of research tools at any stage. In the national human geography it is almost not used, although it has a rather large research field.	The main advantage of this method, in addition to direct contact, is the ability to influence the object of research. The method of social experiment in social geography allows us to create a model of public opinion about the object under study.	Modeling the image and brand of the territory. Identifying the causes of segregation of society. Features of IDPs. Development of strategies for the development of sociogeosystems.

Survey – receiving information in the course of socio-psychological interaction (direct or indirect) of the researcher and respondent in the question-appropriate form. The main types of survey are questionnaires and interviews, which, in turn, can be on-look (referral for questioning) or absenteeism (press, postal for questionnaires, telephone interviews). The interview may be: deep, standardized, non-standardized, focused, free. Survey is the most common method of gathering sociological information [11].

A sociological survey takes place in several stages:

1. The justification of the motivation for which the survey is conducted, the definition of the main goal and auxiliary tasks that allow achieving the goal.

2. Formation of the sample: it is necessary to follow a defined selection system of respondents in order to achieve the representativeness (representation) of data obtained during the survey.

3. Development of survey tools and their testing: one of the most important components of the sociological research is a well-designed survey tool – a questionnaire that needs to be tested before the collection of primary information, that is, to check the quality of the questionnaire itself and its ability to meet the goal of the study.

4. Collection of primary information: consists of selection and interviewing of interviewees, direct questioning. Interviews can be made by telephone, by house, on the street.

5. Encoding the results and processing them: encoding the results allows you to organize information, work with it and apply it. The coded information is subject to computer-mathematical processing.

6. Analysis of the results of the public opinion poll: based on the research conducted, conclusions, assumptions, and recommendations for solving a particular social problem in the form of a specific report [2] are made. In the future, other methods, such as simulation to justify ways to improve or change the situation, are used.

In this article, we focused on the advantages of using the method of interviews, document analysis and observation in human geographical studies. These methods are considered by the example of the IDPs in Ukraine, surveys (using various forms) can provide

information on the structure of IDPs, their social and economic characteristics and their impact on the socio-economic development of the territory, as well as possible options, their influence on the identity of the population of host regions.

The interview method in the IDPs study in Ukraine is characterized by a number of advantages compared with other methods of collecting information: carried out in a short time; representative; controllable; has the ability to combine with other methods of collecting information; may be immediate, since the researcher may be face to face with the respondent; combines simultaneously different forms of communication with the respondent; location of the interview may vary depending on the wishes of the respondent; allows you to obtain additional information and explanations from the respondent; has the ability to quickly change the content of the interview questionnaire.

Deep interviews are a personal interview of the interviewer with the respondent according to a predetermined plan and are widely used in socio-geographical research, but depending on the research objectives, they may differ in technique. The purpose of the deep interview is to identify the opinions, assessments, value orientations of the respondents and conduct without a pre-formed questionnaire. There is a structured “open”, semi-structured and unstructured interview. All of these varieties can be applied depending on research objectives [27].

A *structured “open” interview* is a kind of qualitative interview and is usually used in expert surveys, as well as in adapting toolkits for mass surveys (at the design and implementation stage). In these interviews, all respondents are asked the same questions. The wording and sequence of questions are given rigidly. That is, during an interview it is impossible to change the place questions, reformulate them. This type of interview in human geographical research will allow not only to adapt the toolkit, but also to get an expert opinion on the issues of interest to the researcher in the first place.

The following questions can be formulated by conducting a structured “open” interview with the population regarding their relationship to internally displaced persons (tab. 2):

Table 2

Example of a structured interview questionnaire (developed by the authors):

Total information
1. Year of birth
2. Indicate the name of the settlement, region and country where you were born
Locality _____
Region _____
A country _____
3. What language do you mainly speak:
1. Mostly Ukrainian
2. Mostly, in Russian
3. Mostly, on surzhik
4. Russian and Ukrainian equally
5. In another language / languages

4. Marital status:

1. Married / not married
2. Married and living together
3. Married, but not living together
4. Not officially married / not married, but living together (civil marriage)
5. Divorced
6. Widowed

5. How many children do you have in age ...?

- 0-17 years old
18 years or more

6. How many full years of education you have (school, including technical school, vocational school, university, institute, college, etc.)?

	Respondent	Mother	Father
No education	1	1	1
Initial (less than 4 classes)	2	2	2
Incomplete secondary (less than 9 classes)	3	3	3
Full secondary, general (after 11 classes)	4	4	4
Secondary specialist (technical school, college, etc.)	5	5	5
Incomplete higher (3 courses and more)	6	6	6
Full higher	7	7	7

7. From your household someone (including you) has gone to work or is currently working in another country:

1. No
2. Yes, in Poland, the Czech Republic
3. Yes, in Hungary, Slovakia
4. Yes, in Romania
5. Yes, in Germany
6. Yes, in Russia
7. Yes, in Spain, Portugal
8. Yes, in Italy
9. Yes, in the US or Canada
10. Yes, in another country

8. Do you plan to go abroad soon?

1. Yes
2. Not sure
3. No

9. Can South-eastern Ukraine be considered a special region?

1. Yes
2. Faster than not
3. Rather no, than so
4. No

10. Someone from your household served or is currently serving on the territory of the ATU in the Donbass?

1. Yes
2. No

11. Do you have a migrant status (internally displaced persons)

1. Yes
2. No

Question 12 -13 If in questions 10 and 11 you answered "No"

12. Are migrants from Donbass and Crimea:

1. Among the residents of your area where you live now
2. Among the people that you have had to communicate on any occasion
3. Among your neighbors, colleagues or good friends
4. Among your relatives or close friends
5. Among people living with you in one room

13. Do you agree with the following statements?

1. Most migrants from the Donbas consider themselves citizens of Ukraine with the same rights and responsibilities as others
2. Yes, agree (on)
3. Hard to say, agree or not
4. No, I do not agree
5. Not answered

Semi-structured interviews are a kind of qualitative interview, which involves the presence of a certain pre-list of topics (thematic blocks) that are of interest to the researcher. However, unlike structured “open” interviews, questions can be asked within the set themes. There is no need to adhere to a certain sequence of issues and even blocks of topics. It is important for each topic to be as open as possible [3].

An unstructured (free, narrative) interview is a free narrative on a given topic, in the process of which the speaker's memory inevitably emits episodes that are subjectively assessed by them as the most valuable, important, and, therefore, is a peculiar “point reference”, a turning point in life. During the interview, only the clarifying questions are asked. Additional questions are asked, as a rule, after the end of the story. Narrative interviews can be used in studies, the subject of study of which are, for example, specific groups of people, internally displaced persons, and the subject – the socio-psychological characteristics of these groups of data or the decision-making process in a particular situation.

The method of focus group interviewing is used successfully to study the attitude of local people to internally displaced persons or internally displaced persons to local authorities and serves as a basis for social forecasting. Focus groups are used in the methodological provision of sociological research (hypothesis testing, flight instrumentation). Focus group interviews are based on the use of real group dynamics in an artificially created group to identify the specifics and peculiarities of representations of a particular social group about the subject of the study. Traditionally, the founder of this method is considered to be Robert Merton, whose work “Focused interview” (in collaboration with M. Fiske and P. Kendall) is recognized as classical [9]. Speaking about the use of focus groups in the field of IDPs, it should first be noted that the focus group can identify IDPS problems, a set of explanatory schemes that respondents describe their own behavior. It is important to have a self-explanatory description of their own motives and not a choice from the proposed list of possible alternatives.

Also, in social geographic studies, the *document analysis* of is used. This is a method of study in which the source of information is text messages, in any documents, reports, publications in newspapers, magazines, in letters, works of art, and illustrations.

First of all, the document analysis is carried out with the aim of studying the regulatory framework for the settlement of relations and the definition of the status of internally displaced persons; analysis of static materials to determine the quantitative characteristics of IDPs, peculiarities of their resettlement and integration, problems faced by immigrants themselves. This method defines both the personal characteristics of the migrants, their structural and dynamic features, and the peculiarities of the presentation of these characteristics by the media. This method is well suited for analyzing the migrants' histories, where researchers study or analyze socio-demographic characteristics of internally displaced persons.

In the complex of human geography researches for the collection of information can use the *method of express-observation* but its use depends on a number of features. This method is well suited for studying specific population groups, such as internally displaced persons who are not concentrated locally but live, for example, in places of compact residence of settlers. Using this method, we distinguish several types of social phenomena that can become objects of observation: individual psychological characteristics of the migrant or group of migrants, their interaction with other IDPs and the local population, problems that arise before internally displaced persons and hinder successful integration into host communities, etc.

Taking into account the following sociological methods of gathering information, it can be safely asserted that their application has a positive effect on solving many research issues in contemporary human geography researches.

Conclusions. The analysis of previous studies, including foreign ones, showed the importance of interdisciplinary research. In contemporary conditions, this applies, in particular, to the combination of sociological and geographical methods in human geography researches. This is especially true of the application of sociological methods for gathering information in contemporary human geography. The combination of these methods is extremely necessary, taking into account the transformation of the object-subject area of human geography and insufficiency, and often the unreliability of the available statistical information for analyzing and highlighting the specific features of social change.

The great arsenal of sociological methods makes it possible for a researcher to make a wide choice. However, the role of sociological methods of collecting information in studies of human geography is positive only when the research itself is aimed at obtaining an objective picture of the events studied or help fix the true features and causes of a particular social situation. Otherwise, the consequences of their use in society may be unpredictable. In general, sociological methods in human geography make it possible to identify the specific characteristics of socio-geographical objects, phenomena and processes that can not be investigated by traditional geographic methods, as well as by processing only statistical information.

We have considered the application of sociological methods for collecting information when studying internally displaced persons in Ukraine. This problem is very acute in Ukraine and requires an urgent solution, and hence research. Quantitative and qualitative methods used in studies IDPs, have their own peculiarities, primarily related to the peculiarity of the phenomenon under investigation. The behavior of IDPs, their problems and the particularities of coexistence with the local population allows researchers to choose strategies and methods that are most appropriate and correlate with methodological and methodological settings, the purpose and objectives of the study.

Consequently, these sociological methods of collecting information require extensive testing in human

geography researches, which is one of the tasks of the transformation of the methodological apparatus of science. However, solving complex problems of human geography researches, only on the basis of one method is impossible. Therefore, it is necessary to use a combination, a combination of different methods, that is, to create a research methodology that accumulates different approaches and determines the order (sequence)

of their application. The peculiarities of the use of sociological methods, in particular, the methods of collecting information in the human geography, require further scientific research, discussion in the scientific environment. In addition, in further socio-geographical research authors plan to justify the use of other sociological methods: methods of processing, analysis and interpretation of data.

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Надійшла до редколегії 05.04.2019 р.

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Наукові повідомлення

UDC 911.3:33(475) (477.46)

DOI: 10.26565/2076-1333-2019-26-03

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THE INTEGRATED ECONOMIC-GEOGRAPHICAL ANALYSIS OF THE GREATER POLAND VOIVODESHIP (POLAND) AND THE CHERKASY REGION (UKRAINE)

The integrated regional economic-geographical analysis of the Greater Poland Voivodeship (Poland) and the Cherkasy region (Ukraine) according to M. Baransky's scheme were done in the article. The economy and population of the regions were analyzed using such research methods: comparative, historical, statistical, economic zoning, remote monitoring. The most significant features of similarity and differences in economic use were determined in the article.

The literature has yet to conduct a comprehensive comparative study of the regions of Poland and Ukraine, in particular, the Cherkasy region with the Polish provinces. So, we have investigated that the Greater Poland Voivodeship belongs to the strongest regions of Poland. This estimate is based on the following indicators: the size of the region, the population, including employment, the rate of GDP growth and its share per inhabitant, the level of industrial development, the pace of transformation, the dominant role of the private sector in the economy. An analysis of these indicators, conducted at the Institute for Market Economy Studies, shows that the Greater Poland is in the leading group of the best regions of the country. Cherkasy region belongs to agrarian-industrial regions of Ukraine.

Based on results of the conducted research the following conclusions have been made: The formation of a civil society opens up broad preconditions for the development of industry and commodity products. Improving the assessment of social and economic development indicators, which was conducted in six areas: Financial self-sufficiency, Infrastructure development, Investment development and foreign economic cooperation, Labor market efficiency, Renewable energy and energy efficiency, and Economic efficiency about democratic progress and increase of investment attractiveness of the region. Study of comparative characteristics of socio-economic progress of regions of Ukraine and regions of Poland.

Keywords: economic-geographic analysis, Greater Poland Voivodeship, Cherkasy region, population, economy.

Оксана Браславська, Оксана Герасименко. КОМПЛЕКСНИЙ ЕКОНОМІКО-ГЕОГРАФІЧНИЙ АНАЛІЗ ВЕЛИКОПОЛЬСЬКОГО ВОЄВОДСТВА (ПОЛЬЩА) ТА ЧЕРКАСЬКОЇ ОБЛАСТІ (УКРАЇНА)

У статті здійснено комплексний регіональний економіко-географічний аналіз Великопольського воєводства (Польща) та Черкаської області (Україна) за схемою М. Баранського. У проведенні дослідження використано методи: порівняльний, історичний, статистичний, економічного районування, дистанційних спостережень, проаналізовано господарство і населення регіонів Великопольського воєводства (Польща) та Черкаської області (Україна). Визначено спільні та відмінні суспільно-географічні характеристики господарства порівнюваних регіонів.

Здійснено комплексний аналіз тематики наукових досліджень. Всебічне порівняльне дослідження регіонів Польщі та України, зокрема, Черкаської області з польськими провінціями є маловивченим. В ході дослідження ми дійшли висновку, що Великопольське воєводство належить до найрозвинутіших регіонів Польщі. Ця оцінка ґрунтується на наступних соціально-економічних показниках: територія, характеристика населення, включаючи зайнятість, міграційні процеси, темпи зростання ВВП та його частки на одного мешканця, рівень промислового розвитку, темпи трансформації, роль приватного сектора в економіці. Черкаська область належить до аграрно-промислових регіонів України. В області розвиваються транспорт, машинобудування, харчова промисловість та ін.

За результатами проведеного дослідження зроблено наступні висновки: формування громадянського суспільства відкриває широкі передумови для розвитку промисловості та товарної продукції; удосконалення оцінки показників соціально-економічного розвитку, що проводилося у шести сферах: фінансова самодостатність, розвиток інфраструктури, інвестиційний розвиток та зовнішньоекономічне співробітництво, ефективність ринку праці, відновлювана енергетика та енергоефективність, економічна ефективність демократичного прогресу та зростання інвестиційної привабливості регіону. Вивчення порівняльних характеристик соціально-економічного прогресу регіонів України та регіонів Польщі сприятиме інтеграції України до європейського простору.

Ключові слова: економіко-географічний аналіз, Великопольське воєводство, Черкаська область, населення, господарство.

Оксана Браславская, Оксана Герасименко. КОМПЛЕКСНЫЙ ЭКОНОМИКО-ГЕОГРАФИЧЕСКИЙ АНАЛИЗ ВЕЛИКОПОЛЬСКОГО ВОЕВОДСТВА (ПОЛЬША) И ЧЕРКАССКОЙ ОБЛАСТИ (УКРАИНА)

В статье проведен комплексный региональный экономико-географический анализ Великопольского воеводства (Польша) и Черкасской области (Украина) по схеме Н. Баранского. С помощью сравнительного, исторического, статистического методов исследования, экономического районирования, дистанционных исследований, проанализировано хозяйственная деятельность и население исследуемых регионов.

Анализ литературы показал, что вопросу всестороннего исследования социально-экономических проблем регионов Польши и Украины, в частности, Великопольского воеводства (Польша) и Черкасской области (Украина) уделено мало внимания со стороны украинских и польских ученых эконом-географов. Мы исследовали, что Великопольское воеводство принадлежит к самым сильным, в экономическом отношении, регионов Польши. Эта оценка основывается на следующих показателях: размер региона, население, включая занятость, миграционные процессы, темпы роста ВВП и его доли на одного жителя, уровень промышленного развития, темпы трансформации, доминирующую роль частного сектора в экономике.

По результатам проведенного исследования сделаны следующие выводы: формирование гражданского общества открывает широкие предпосылки для развития промышленности и товарной продукции; совершенствование оценки показателей социально-экономического развития, которое проводилось в шести сферах: финансовая самодостаточность, развитие инфраструктуры, инвестиционное развитие и внешнеэкономическое сотрудничество, эффективность рынка труда, возобновляемая энергетика и энергоэффективность, экономическая эффективность демократического прогресса и рост инвестиционной привлекательности региона. Изученные сравнительные характеристики социально-экономического прогресса регионов Украины и Польши будут предпосылкой для интеграционных процессов Украины в европейское сообщество.

Ключевые слова: экономико-географический анализ, Великопольское воеводство, Черкасская область, население, хозяйство.

Definition of the problem. Modern integration processes of Ukraine in the world, in particular in European society, determine the significance of the research of the Ukrainian state in the world, distinguishing economic and socio-geographical aspects of the world community in general and individual regions. At the present stage of the development of Ukrainian-Polish relations, it is important to study the comparative socio-geographical characteristics of certain regions of Ukraine and the voivodships of Poland, the definition of a specific economic problem for the district, which connects all the facts and phenomena that characterize of the area. Particularly important for us is the comparison of the regions of the two neighboring countries of the first order of Ukraine and Poland. Choosing a research topic is not accidental. Particularly important for us is the comparison of the regions of the two countries of Ukraine and Poland, the first-order. The integration of Polish-Ukrainian relations takes place within the framework of cooperation between educational, scientific institutions, cultural-artistic groups, enterprises.

Partnership agreements were signed between the villages, cities of Cherkasy region and the communes, cities of the Greater Poland Voivodeship: "Agreement on cooperation between the Zelenodibrovsky village council of Gorodische district and the Gmina of the Pleshevsk district of the Greater Poland Voivodeship (Poland)", May 22, 2006; "Bilateral international agreement on partnership, cooperation and cooperation between Gniezno County (Greater Poland Voivodeship) and the Uman Region", October 18, 2010; "Agreement on establishment of twin relations between Uman and Gniezno (Poland)", May 2, 2005 [10].

Analysis of recent research and publications.

Currently, there is a tendency in Ukraine to consider the general issues of economic-geographical research, peculiarities and prospects of development of foreign economic relations between Ukraine and the Republic of Poland. S. Antonyuk [14], V. Borshevsky [16], V. Bezuglogo, [15], V. Budkina [17], V. Gevka [20], D. Lukyanenko and V. Chuzhikov [4], Ye. Makarenko [26], M. Malsky [27], V. Obodovskaya [28, 29].

Yu. Priszahnyuk [32], Ye. Savelyev [33], A. Skovronskaya-Lucinskaya [34], L. Chekalenko [36], G. Shcherby [38] and others.

Questions of socio-geographical changes in Cherkasy region (Ukraine) were studied by, in particular, the historical aspect researched P. Tronko [23], demographic features - I. Kozinskaya, Yu. Tishchenko [24], the nature of the region described P. Moroz, V. Lukianets, I. Kosenko [31] and others.

The problems of political and socio-economic transformation of Poland and Ukraine were studied V. Demianets [21], V. Strutinsky [35], G. Zelenkov [22] studied the problems of political and socio-economic transformation of Poland and Ukraine.

The following scholars L. Adamsky [1], L. Vasiliev [9], K. Voitsyk, Y. Ruzhkovsky [11], M. Voznyak [13], A. Levandovskaya and D. Szeligowski [2], V. Lysek [5], T. Olshansky [6], A. Sheptytsky [8] and others are involved in the study of Ukrainian-Polish foreign economic relations in the Republic of Poland.

The following scholars L. Adamsky [1], L. Vasiliev [9], K. Voitsyk, Y. Ruzhkovsky [11], M. Voznyak [13], A. Levandovskaya and D. Szeligowski [2], V. Lysek [5], T. Olshansky [6], A. Sheptytsky [8] and others are involved in the study of Ukrainian-Polish foreign economic relations in the Republic of Poland. At the same time, comprehensive comparative studies of the economic-geographical features of the Wielkopolska Forestry (Poland) and Cherkasy region (Ukraine) were not conducted.

The study of foreign economic relations of Ukraine and the Republic of Poland at the present stage will reveal even greater opportunities for integration of the economy of our state in the European space.

The literature has yet to conduct a comprehensive comparative study of the regions of Poland and Ukraine, in particular, the Cherkasy region with the Polish provinces.

The aim of the study is to compare socio-geographical indicators of Cherkasy region (Ukraine) and Wielkopolskie Voivodship (Poland).

Presenting main material. The comparison was carried out according to M. Baransky's "district" scheme, which involves disclosing the following aspects when creating a country's characteristics: the geographical location of the district; natural conditions and resources with their economic evaluation; historical and geographical factors of formation of the modern territory; population (composition, population change, placement, resettlement, especially in cities and urbanization, labor resources, culture); economy (characteristic, leading industries, foreign trade) [4, p. 32].

The integrated economic-geographic analysis of the Greater Poland Voivodeship (Poland) and Cherkasy region (Ukraine) were done using such research methods: comparative, historical, statistical, economic zoning, and remote observation.

Geographical location. Greater Poland Voivodeship, as a region was established on January 1, 1999 in the western and central parts of Poland. Cherkasy region was founded on January 7, 1954 in central Ukraine. The Greater Poland Voivodeship is one of the largest regions of Poland (the area of 29,826.5 km²) is bordered: in the north by the Pomeranian and Western Pomeranian Voivodeships, east of the Lodz and Kujawsko-Pomeranian Voivodeships, in the south with the Lower Silesian and Opole Voivodeships, in the west with Lubuskie Voivodship. The area of the region is average compared to the European countries, for example, Belgium or European countries, for example with Brandenburgia in Germany. Greater Poland Voivodeship is located at the crossroads of European communications. Here are important roads cross that leading from Berlin through Poznan and Warsaw to Kiev and Moscow, as well as from Prague through Wroclaw.

Cherkasy region (an area of 20 900 km²) borders on: in the north with the Kiev region, in the east with the Poltava region, in the south with the Kirovograd region, in the west with the Vinnitsa region. The important highways cross through the Cherkasy region: St. Petersburg – Odessa, Stryi – Ternopil – Kropivnytsky – Znamianka, Kaniv – Kremenchug. Railway transportation in the region is provided by the enterprises and organizations of the Shevchenko railway transportation directorate. The Directorate is located at the intersection of two main directions: Moscow-Odessa and Donbass-Carpathians. The length of the track is 840 km.

Natural conditions and resources, their economic evaluation. The two studied regions lie on the hills (Wielkopolske Voivodship – on the Wielkopolski Lowland, and Cherkasy region – on the Dnieper Highlands; Drabivsky, Zolotonsky, Chornobayevsky Districts – on the Poltava Plain). The relief of the two studied regions was affected by quaternary glaciation. In Poland, the Pomeranian, Poznan and Gniezno lakes have glacial basin origins [6]. The surface of the Cherkasy region in the past had undergone very intense erosion in the pre-glacial and glacial periods. The left bank plain, which is an ancient accumulative terraces of the Dnieper, is oblivious and characterized by flat, flattened and slightly wavy forms of relief. In general, according to geomorphological features in the territory of Cherkasy

region, one can distinguish three main types of relief: the flat-bottomed (Zolotonsky, Drabivsky and Chornobayevsky districts); broad-waved valley-bilge water-rustic (Khrystynivsky, Zhashkiv, Umansky, Mankovsky and Talnivsky districts); narrowly wavy valley-beam water-rustic (Kaniv, Korsun-Shevchenkivsky, Smelyansky, part of Chigirinsky and Lisyansky districts) [11, p. 12-13]. The highest point of the Greater Poland Voivodeship is the Kobyl Gory peak (284 m), The highest point of the Cherkasy region (275 m) is located to the west of Monastyrysche. The Kanivsky-Moshnogorsk ridge (160-180 m) is distinguished in the structure of relief of Cherkasy region.

The climate of the regions is moderate. Wielkopolska Voivodship has moderate marine climate: the average July temperature is + 18°C, the average January temperature is -2°C, the average temperature is +8.2°C, the annual precipitation is 500-550 mm. In the Cherkasy region, the climate is moderately continental. There is a greater amplitude of temperature fluctuations, average temperatures: in July + 20.1°C, January - 5.9°C, average annual temperature + 7.3°C. Annual precipitation is 450-550 mm.

The most common soils in the Cherkasy region are black soils (75% of the total area), in the Greater Poland Voivodeship – podzolic soils (60% of the total area). Within the Cherkasy region there are 1059 rivers with a total length of 5877 km. The largest rivers, that are flowing over the region are the Dnieper, 150 km long, the Hirskiy Tikych – 161 km, the Tiasmin – 133 km. On the territory of the region there are 2312 ponds with an area of a water mirror of 17 thousand hectares and 37 reservoirs with an area of 5.86 thousand hectares. The largest reservoir is Kremenchug reservoir. Within the limits of the region it reaches 130 km, the width near the city of Cherkasy – 18 km. Unlike Cherkasy region, on Wielkopolskie land there are many lakes (about 800). The largest are Pomeranian, Poznan and Gniezno. The largest rivers: Barich, Obzhitsa, Warta, Odr.

Minerals. Brown coal is extracted in both regions (in the Greater Poland Voivodeship (Konin, Turku, Kolo deposits), in Cherkasy region (deposits of Kozatskoye, Ryzhanivske, Yurkivske in Zvenigorodskoye, Novoselyts'ke, Mokrokalgiriske in Katerinopilskii). Cherkasy region is rich in non-metallic minerals, first and foremost, building materials. Granites of different types occur in Gorodyshchensky, Korsun-Shevchenkivsky, Smiliansky, Uman and other districts. About 400 deposits of different clays are known. Bentonite clays located near the villages of Dashukivka and Hizhynets of Lisyansky district. Not far from Murzynets and Neomorozhs of Zvenigorod district, Novoselytsya, Katerinopilsky district, there are high-quality refractory clay – kaolin. Quartz sand are distributed throughout the Cherkasy region. There are significant reserves of building and facing stone also. The most famous deposits of granite – Starobabanska and Tanske, whose products are supplied far beyond the boundaries of the region. Greater Poland Voivodship is rich in natural gas and oil deposits. The peat deposits are near Blazievo, Milkwater, and Mechnachu. The rock salt produced in Klodave has a pink color due to the

admixture of iron. The lime is extracted. There are gypsum deposits in Wielkopolska Voivodship and Cherkasy Region.

Cherkasy region, having an area of 20.9 thousand square kilometers, belongs to the lesser regions of Ukraine: the total area of the forest fund of the region is 338.6 thousand hectares, including forest covered – 322.4 thousand hectares, which is 15.4 % of its territory, with optimal forests – 16%. Widespread forests occupy an area of 766.2 thousand hectares, which is 25.7% of its area [9; 6].

Historical and geographical factors of the formation of modern territory.

The formation of the modern territory of the Cherkasy region and the Greater Poland Voivodship has a diverse history. The territory of the present Cherkasy region was populated in the Middle Paleolithic period of about 130-100 thousand years ago. Near Mezhirich on Kanivshchyna was discovered the late Paleolithic parking of hunters on Mamutov – Mezhyritytskaya parking.

A significant place is occupied by materials of Trypillian culture (IV-III millennium BC), found in settlements near the villages of Maydanetska, Tal'yanka and Dobrovoda. In the VII – III centuries BC a significant part of the territory of the steppe regions of Ukraine, including Cherkasy region, occupied the nomadic and Iranian-language tribes of the Scythians. At the same time on the right bank of the Dnieper lived settled agricultural tribes, the direct ancestors of the Eastern Slavs. The territory of the modern region was part of the lands of the Prydniprov'ia, where the core of the East Slavic tribes was formed, from which a mighty feudal state – Kievan Rus arose. In the above-mentioned period, the western valleys lived on the banks of the Vartai River.

In the second half of the tenth century the first great prince of Meshko I (about 935-992 gg.) came from a powerful Western-Polish family of Pyas, established power over most of the lands inhabited by his tribesmen. Thus the foundations of the Polish kingdom were laid. In 1138, on these lands there emerged the Wielkopolska principality, headed by Prince Mashko II (1126 / 1127-1202rr.). The first mention of Great Poland dates back to 1257, and after twenty years Prince Wielkopolski Przemyslav II crowned here, declaring himself king of Poland. In 1314 Prince Krakowski Vladislav I Loketech (1260 / 1261-1333 biennium) united the lands of Lesser and Greater Poland. Having lost its capital status, thanks to the favorable location on the Amur Way, which in the Middle Ages connected the Baltic and the Mediterranean, Great Poland became a trading power of pan-European significance [6].

In the XIV-XVI centuries the territory of the modern Cherkasy region was captured by the Lithuanian and Polish feudal lords. In the XV-th century, the first settlements of the Cossacks appeared in Cherkasy region, and Cherkasy, founded at the end of the XIII th century, became their powerful fortification in the struggle against the Polish gentry, the attacks of Turks and Crimean Tatars.

With the beginning of the Thirty Years' War of 1618-1648, the flow of immigrants – Protestant

Germans, mainly from Silesia, flooded into the territory of the Greater Poland Voivodship. In the wards of Poland, Wielkopolska's lands were severely affected: by the decision of the Vienna Congress in 1815, the western part – most of Velkopol land came to Prussia, eastern – lesser – Russia. The local population did not want to ignore, it created an organized opposition [6].

In 1797, when the provinces of the Right Bank Cherkasy region became part of Kiev, and the Left Bank – to Malorossiysk province.

The reform of 1861 gave impuls to the rapid development of industry. In the second half of the XIX century, the leading position in Cherkasy region was occupied by the sugar industry.

In 1917-1920 on the territory of Cherkasy region, on the wave of national uprising, the authorities of the UPR, the Hetmanate and the Directorate are established, and the first detachments of the Free Cossacks are formed. Long after the Government of the UNR ceased its activities, part of Cherkasy region was part of the Kholodnoyarsk Republic, where the Cossacks had the longest armed resistance to the Bolsheviks (until 1922-1924). At the end of the First World War, using the political situation, the inhabitants of the western part of the Greater Poland Voivodship raised an uprising, which resulted in the return of Poland to the land previously obtained by Prussia under the terms of the Versailles Peace Treaty of 1919 [5]. The area of the bloody battles of the Second World War from June 1941 to March 1944 became the territory of Cherkasy region, and the territory of the Greater Poland Voivodship suffered from September 1939 to May 1945 [7, p. 30-48].

Cherkasy region was established on January 7, 1954. It consisted of three cities of regional subordination (Cherkasy, Smila, Uman) and territories of 30 districts of Kyiv, Poltava, Kirovograd and Vinnitsa regions [7, p.10-87]. The Velipopolske Voivodship was established in 1999 from the provinces of the previous administrative division: Poznan, Konin (except Communes Uniejów, Grabów and Świnice Warckie), Pilsskie (except for the communes of the Wales District), Leszno (except for the municipalities of Gorowski and Wschowa), Kalisz (Crimé communes of the districts Verusuv and Olenitsa), Zelena Gora (only the municipalities of Volkstin, Saddles and Zbanshin), Horzov (only Mendzhihud and Miedzichowo municipalities), Bydgoszcz (only Trzemesznocommune) [3].

Population (composition, population change, placement, settlement, urbanization, rural settlements, labor resources).

Since the formation of Cherkasy region, the population has increased and reached the maximum number at the beginning of 1990 – 1531.6 thousand people. However, in the early 90's, a steady decline in the population began and according to the results of the All-Ukrainian Population Census in 2001, 1418.8 thousand people were present [8, p. 54-58]. As of 01.01.2018 in Cherkasy region the population was 1 221, 4 thousand people [12].

In Wielkopolska voivodship as of 01.01.2018, the population was 3 469, 4 thousand people [2]. Unlike traditional urban and rural settlements in Europe, in

Poland the smallest administrative unit is gmina – city, village or group of villages and cities. The name comes from him. Gemeinde – community, community. In the Greater Poland Voivodship, there are 19 urban municipalities, 90 urban-rural and 117 rural. On the rights of the counties – Poznan, Kalisz, Konin, Leszno. In Cherkasy region, within the framework of territorial reform, as of September 1, 2018, 50 united territorial communities were formed.

The size of the urbanization of the Greater Poland Voivodship is high (56.6%). [6], the share of urbanization in the Cherkasy region is 44, 2%. [8, 54-58] (div Picture1,2). Within the framework of the opening for Ukrainians "free-travel" to European countries in recent years, there is a mass migration of residents of Cherkasy region to Poland, in particular the Greater Poland Voivodship to study and in search of work.

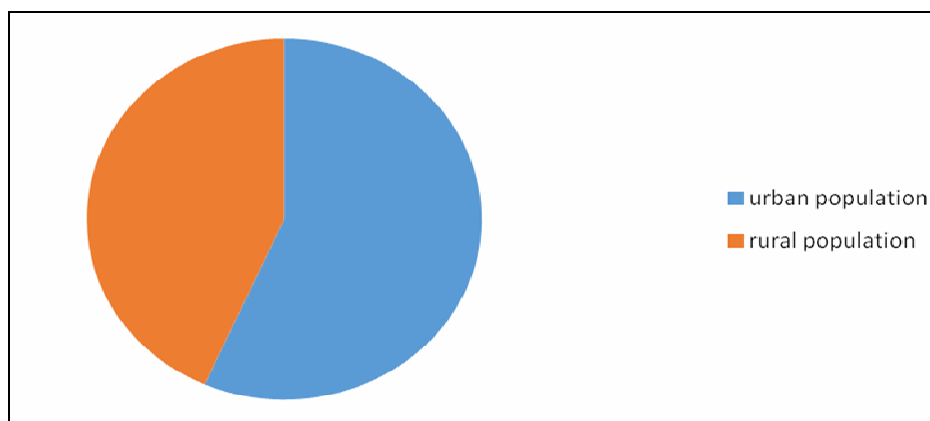


Fig. 1. Distribution of the population of Greater Poland Voivodship (Poland)

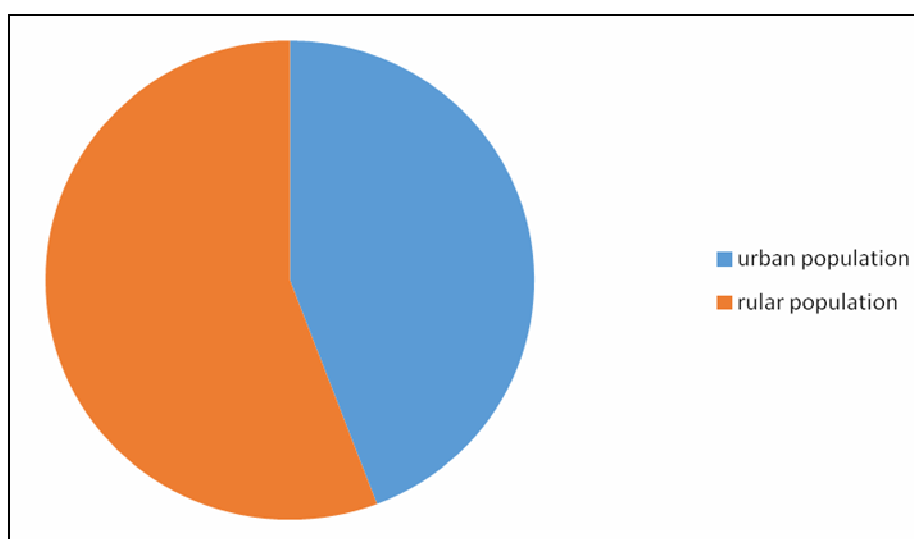


Fig. 2. Distribution of population of Cherkasy region (Ukraine)

Industry. Industry occupies an important place in the economy of the Greater Poland Voivodship. This is a source of funds for the existence of about one-third of all employed and provides the bulk of the gross domestic product produced in Great Poland. The most famous industrial centers of the Greater Poland Voivodship are: Poznan, Kalisz, Ostrow, Konin, Pila and Leszno. Over the past four years, the Wielkopolska Voivodship has been one of the ones that showed the highest dynamics of industrial production growth. It was 9%, while in Poland it did not exceed 6% over the same period. According to the results of monitoring of the socio-economic development of the regions in January-March 2018, Cherkasy region shows an increase. The assessment was conducted in six areas: "Financial self-

sufficiency", "Infrastructure development", "Investment development and foreign economic cooperation", "Labor market efficiency", "Renewable energy and energy efficiency", "Economic efficiency" [1]. A characteristic feature of the industry of the studied regions is the vast majority of small and medium-sized enterprises, the advantage of which is high mobility and flexibility in adapting to the rules of the market game both in Wielkopolska Voivodship and in Cherkasy region. In the struggle for European markets, more and more enterprises are subject to quality checks – international quality control systems ISO. The sphere of agro-food processing dominates in the sectoral differentiated structure of the industry of the Greater Poland Voivodship and the Cherkasy region. The production of

motor vehicles belongs to the most important industrial groups in the developing world. Other important industries include foundries, pharmaceuticals, furniture, lighting and home appliances; ceramics and glass, plastic products for construction, tires, textiles and clothing, represented by well-known domestic and foreign capital. An important role is played by brown coal mining, metallurgy and energy production in the Konin area. The high level and potential of the Wider Poland industry provides a wide range of sales of its products, which is well known at home and abroad. Among them: marine engines and planes, cars and their equipment, metal cutting machines, machinery and equipment for forestry. Before sale include: marine and aviation engines, passenger cars and their equipment, metal cutting machines, machinery and equipment for forestry, agriculture, construction, paints, chemical fertilizers, pharmaceuticals, meat products, chocolate, beer, furniture, ceramics, clothing and textiles [1].

In Cherkasy region, passenger cars, agricultural machinery, pharmaceuticals, nitrogen fertilizers, meat products, beer, furniture, clothing and footwear, leather goods are exported. In the Wielkopolska Voivodship, as in the Cherkasy region, the enterprises of the food industry are the lion's share in the structure of industry. The production of food products, which accounts for more than 25% of the cost of sales, is based on a remarkable raw material base for agriculture in the Greater Poland Voivodeship [2]. A significant share in the sales structure of Cherkasy region is in the production of cars, wooden products, including furniture, production of agricultural machinery and equipment [12].

Industrial centers. In the Wielkopolska Voivodship, the spatial distribution of production functions is uneven. The most developed in major city centers, such as Poznan, Kalisz, Konin, Leszno. Smaller concentration centers of industry are located in some settlement towns, including Gniezno, Vozeszna, Wagrowiec and others. Poznan and its surroundings are characterized by great industrial potential. The largest share in the industry, sold in the capital of the region, has the food industry and the production of motor vehicles, further – the production of machinery and equipment and chemicals. The symbol of the Poznan industry, with more than 150 years of history, is: Lodges of the Przemysl Metal O. Chegielskie-Poznan SA, Centra SA, Zakłady Metalurgiczne "Pomet", "Stomil" - Poznań SA, Volkswagen Pozn. The most well-known companies in the food industry are: JSC Pivovarska, JSC Yurttsenko, Zakhladie Toshne CJSC «Know», «Wyborowa SA», «Imperial Tobacco Polska» SA.

The second largest industrial center in Greater Poland is the Kalisz agglomeration. Here are the food industry companies represented by the well-known Kaliningrad Zakłady Koncentratów Spożywczych "Winiary" SA, Fabryka Pieczywa Cukierniczego "Kaliszanka" Sp. z oo and Przedsiębiorstwo Produkcji Chłodniczej. The textile and clothing industry is also developing. The products of this industry come from, among others, such well-known companies as: Factory Firanek and Koronek "Khat" SA, Zasta Pshemyslov

Jedvabnitsogo "Vistyl" S.A., Factory Manufactured Runevich "Runtex" S.A.

Kalisz also produces aviation engines and well-known pianos and piano "Kalisha". Kalisha is located near the Kalisha power engineering enterprise of the electromechanical industry. The specialty is very important for the region and the country. An important center of industry is Konin. Its main production potential is brown coal production and its production complex, electricity generation. Aluminium Metallurgical Plant JSC, the only one in Poland, also works. In Leshenko, there is a lower degree of industrialization.

However, the factories located here make a number of prestigious products, widely known outside their region. In Pila, Philips Lighting Poland SA, a manufacturer of light bulbs and lighting equipment, is one of the first companies established in Poland with foreign capital. In the city of Leszno, the capital of the region known for its high culture of agricultural production, the food industry is distinguished, the prominent representative of which is Przedsiębiorstwo Przemysłu Fermentacyjnego "Akwawit", which produces lactic acid products. There are also companies in the metallurgical and machine-building industry, including Leszczyńska Fabryka Pomp Sp. z oo and "Metalplast" LOB SA – manufacturer of locks, fittings, doors and gates [2].

In Cherkasy region there are such industrial centers as Cherkasy, Uman, Smila, Zolotonosha, Kaniv. Cherkasy is the largest industrial center. In Cherkasy there are machine-building enterprises located at PJSC "Cherkassky bus", specialized in the production of buses, "Subsidiary enterprise" Automobile assembly plant № 2 "PJSC" Automobile company Bogdan Motors", which manufactures cars and trucks, PJSC "Cherkasy Instrument-Making Plant", specializes in the production of heater salon for Bogdan buses; carries out services on mechanical processing of metal products; manufactures electrical signaling devices for protection against theft or fire and similar equipment for use in buildings; Electric motors and DC generators with a capacity exceeding 37.5 W; Electric motors of single-phase electric power with a capacity not exceeding 750 W, State Enterprise NSC "Photopluder" for the production of optoelectronic devices, LLC "Company" Metal-Invest", which provides services for coating metal products by immersion into a melted metal zinc or tin, LLC "Cherkasy-elevatormash" for the production of grain extruders, lifts. The regional center is the center of the chemical industry: at the PJSC "Azot" enterprise, produce ammonia, mineral fertilizers, ion-exchange resins, Cherkasy paint and varnish plant "Aurora" Ltd. produces paint and varnish materials.

The pharmaceutical industry is developing at OJSC "Vatfarm" producing materials for dressing catgut, first aid kits; tampons, cotton wool, gauze, and Yuri-farm Ltd. produce medicines. The enterprises producing light industry work: JSC Cherkasy Silk Factory, which manufactures finished fabrics of chemical fibers and yarns, mixed (unmixed) fibers, artificial and natural fibers, mainly or exclusively with cotton fibers; PJSC "Laventa", which produces shoes. The woodworking industry is represented by enterprises: LLC "Cherkasy Plate Materials Plant" for the production of plywood,

wooden slabs and panels, veneer. Heat-insulating materials are produced by TechnoNIKOL Corporation, LLC "Plant of heat-insulating materials" TEHNO". Building materials industry is developed at the enterprises:

LLC "Cherkasy Factory of Reinforced Concrete Products", which produces elements of constructions, prefabricated for construction from cement, concrete or artificial stone; LLC Buddetal Plant, which produces blocks and bricks made of cement, concrete or artificial stone for construction, the production of equipment for supermarkets is manufactured by Eugene LTD, the products of which are fans of desktop, floor, wall, window, ceiling or a roof with an electric motor. In Smila, Smolyan Machine-Building Plant operates, the products of which are equipment for food, chemical industry and railway transport companies; at the Scientific-Production Enterprise Smiliansky Electromechanical Plant PJSC produce knots and parts for electric motors and generators, services for their repair; on producing furniture accessories, agricultural machinery and specializing in metal processing. The State Enterprise "Orizon - Navigation" manufactures satellite navigation equipment for the consumers of the SNA, security devices for railroad transport; at the State Enterprise "Orizon - Univarsal" produce electronic scales of various purposes, postal equipment; in scientific and production PE "DAKelectroProm" carry out services on repair of electric motors.

The production of the Smlyansk furniture factory LLC "Furniture-LIVS" is known far beyond its borders. The private enterprise "Salon" Snizhana" is engaged in sewing of outerwear. Products of ferrous and non-ferrous metals are produced at OJSC Smiliansky factory of metal products and Smiliansky Foundry LLC, where they carry out services in the casting of gray iron; steel casting services. Pharmaceutical enterprise LLC "Firm" Technocomplex "produces gauze masks, medical products. The budget-making enterprise of Uman is PJSC "Umanfermmash", which specializes in the production of agricultural machinery. Other enterprises of mechanical engineering and metal processing work: OJSC "Plant" Megommetr", which manufactures electric measuring instruments; at the enterprise PE "Gazopolimerkomplekt" produce sanitary ware products and their parts, from ferrous metals, as well as sanitary ware and parts thereof, made of aluminum; LLC "ROST" is engaged in the production of nails, screws, galvanizing of metal products. At the Pharmaceutical Enterprise PJSC "Technolog" and PJSC "Vitamins" produce medicines and medical products.

Light industry enterprises are represented by LLC "Uman shoe factory", which produces billets of footwear from tolling raw materials and PP "Sewing factory", whose garments are known outside of Ukraine. Enterprises of the construction industry PE "World of windows", which manufactures door and window blocks, made of plastics; Private enterprise "Umansky factory of ferro-concrete products", which manufactures blocks and bricks made of cement, concrete or artificial stone for construction.

In Zolotonosha, PJSC "Zolotonsky Machine-Building Plant named after Lepse", which produces

equipment for the mechanization of works in metallurgy. At the PJSC "Zolotonosha Perfumery and Cosmetic Factory" and "Perfume and cosmetic production" Zolotonosha" produce perfumery and cosmetics, perfumes, toilet water, colognes. In the city of Kaniv, LLC "Magnitprilad" produce electromagnetic devices. Kaniv HPP Branch of PJSC "Ukrhydroenergo" produces electricity. At the enterprise of PJSC "Zakordonenergomoklistbud" are produced for the left bank of the construction of the rest and their parts made of ferrous metals. Dukat-S Ltd. produces washing machines. "Kaniv PAK Ltd." specializes in the production of consumer goods (garbage bags, foam rubber sponge) [12].

Thus, in the Greater Poland Voivodeship (Poland) and Cherkasy region (Ukraine), the main pillars of the economy are industry, high-value agriculture and a wide network of services, primarily financial and trade. The multi-vector economy was, of course, a factor that mitigated the effects of the transformation process and created favorable starting conditions for a market economy. In Poland, after 1989, nothing has been limited, public activity has resulted in a rapid increase in the number of economic entities. Today, the number of these entities is formed at the level of 333 thousand, which allows the voivodship to take 3rd place in the country. Approximately 40 major Polish companies are on the list of the 500 largest enterprises in Poland. Cherkasy region belongs to agrarian-industrial regions of Ukraine. The formation of a civil society opens up broad preconditions for the development of industry and commodity products. Improving the assessment of social and economic development indicators, which was conducted in six areas: Financial self-sufficiency, Infrastructure development, Investment development and foreign economic cooperation, Labor market efficiency, Renewable energy and energy efficiency, and Economic efficiency about democratic progress and increase of investment attractiveness of the region (Table 1).

Recreation and tourism. Greater Poland Voivodeship and Cherkasy Region have many historical and cultural objects that reflect the various stages of the development of the history and culture of the regions, the lives and activities of well-known people, have artistic and scientific value. The centers of tourism in the Greater Poland Voivodeship are the center of ancient Poznan – it's the Stary Rinok. By its size, it is second only to Krakow and Wroclaw. On its perimeter there are stone houses, most of which were restored in the 50 years of the last century in the former Baroque and classical forms. But the interiors of these architectural monuments often retain the traits of the early styles – Gothic and Renaissance. As a rule, houses have three floors: the owners lived at the top, and the first two floors adapted to a workshop or trading room.

Later here came the real palaces of the prosperous Knowledge gentry. None of the tourists will miss the building of the Town Hall, located in the center of the market. Moreover, every day at noon at its bell tower begins an unusual action: two goats run out and start shrugging. For the first time this divination appeared in the middle of the sixteenth century. The tourists are detained at the Proserpine Fountain (mid-eighteenth cen-

ture), and at the pillar of a shame made in the form of a stone column. Tourist attractions of Great Poland do not end with one Poznan. Kalisz is the oldest city in Poland on the territory of the Voivodeship. It is mentioned in the works of Ptolemy Claudius under 142 – 147 years, and Gniezno is the first capital of the state. In Gniazno is Mount Lech, which later erected a monumental Gothic

cathedral. It contains the relics of St. Wojciech, who baptized the Poles. In Lien, the old one cannot take a look at the newly built basilica. This temple is the largest in Poland, and Lichhen himself became the second after the Clear Gora in Częstochowa a place of religious worship, the center of pilgrimage.

Table 1

Analysis of industrial enterprises of the Great Poland Vozvodstvo (Poland) and Cherkasy region (Ukraine)

Branch industry	Greater Poland Voivodeship (Poland)			Cherkasy region (Ukraine)		
	Name enterprises	City	Product	Name enterprises	City	Product
Fuel and energy complex	AO Complex of power plants	Konin	Electricity	PJSC "Cherkasy-oblenezero"	Cherkasy	Maintenance of electric networks
	JSC Poznan Energy	Poznan	Maintenance of electric networks			
	JSC "Kalysh Energy"	Kalisz	Maintenance of electric networks			
Metallurgy	JSC "Aluminum Metallurgical Plant"	Konin	Production of aluminum	LLC «Company« Metal-Invest »	Cherkasy	Metal coating services by zinc or tin metal immersion
Machine-building industry	PJSC "Volkswagen Poznan"	Poznan	Cars and Trucks	Subsidiary enterprise "Automobile assembly plant № 2" PJSC "Automobile company" Bogdan Motors "	Cherkasy	Cars and Trucks
				PJSC "Umanfermmash"	Uman	Agricultural machinery
Chemical Industry				PJSC "Azot"	Cherkasy	Ammonia, mineral fertilizers, ion exchange resins
				LLC "Cherkasy paint and varnish plant" Aurora "	Cherkasy	Paints and varnishes
Pharmaceutical industry				OJSC "Vatfarm"	Cherkasy	Materials for dressing and ketgut, first aid kits; tampons, cotton wool, gauze
				Yuri-farm Ltd.	Cherkasy	Medicines
				PRT "Technologist"	Uman	Medicines
				OJSC "Vitamins"	Uman	Medicines
				PJSC "Monfarm"	Monastir City	Production of pills, capsules, alcohol solutions, suppositories

In the city of Glukhiv there is a castle of the sixteenth century. Completely restored, he took over the function of the affiliate of Poznan National Museum. You can admire not only the castle and exhibits contained in it, but also the beautiful park on the territory of which there is an embankment for bison. The Palace in Rogalin impresses with its exquisite forms, while the park is old-timed oak (the most ancient one is about 600

years old). Interest is represented by a collection of old strollers, as well as items accompanying travelers.

The palace and park complex in Chernev is interesting not only for buildings, but also for the kitchen. In the former carriage barn there was opened a restaurant, which serves dishes mainly from game. Specialist horses are at the service of horseback riding. You can ride and just on a gimlet. It is sensible for fans of the aviation strategy to go to Leshno, the largest center of gliding,

aeronautical modeling and aeronautics. In addition, it is a small town literally filled with baroque architecture. Ridzin is generally called the open-air museum. Here is the baroque plan of development of the seventeenth century.

Cherkasy region is known abroad for its tourist historical and cultural objects. In the Cherkasy region, among the tourist objects, the national historical and cultural reserves and the literary-memorial museum of T. Shevchenko in the village of Shevchenko of Zvenigorod district are distinguished, the museum is an integral part of the historical and cultural reserve "Fatherland of Shevchenko", which also includes monuments and memorable places in Morinets, Vilshany, Wonders, associated with the life and work of T. Shevchenko.

Shevchenko National Reserve in Kaniv. The reserve includes the T.G. Shevchenko Museum, the grave of the poet on Tarasoy Hill, the restored hut of I. Yadvolsky, the Assumption Cathedral in Kaniv, the estate of Maximovich in Prokhorivka and a number of archeological monuments. The National Historical and Cultural Reserve "Chigirin" includes monuments and memorable places connected with the life and activity of Bogdan Khmelnytsky, the liberation struggle of the Ukrainian people and the state-building processes of the middle of the XVII century. Among the historical and cultural objects is the Museum of B. Khmelnytsky in Chyhyryn, the Ilyinsky church in Subotin, the monuments of the Kholodnyi Yar.

The Korsun-Shevchenkivskyi State Historical and Cultural Reserve includes the Museum of the History of the Korsun-Shevchenko Battle, the Historical Museum, the Art Gallery, the Memorial Museum of the composer K.G. Stetsenko in Kvitka, the literary-memorial museum of I.S. Nechui-Levitsky in Steeblyv and landscape park in Korsun-Shevchenkivskyi. The monuments connected with the history of the Decembrist movement in Ukraine, the work of the leading figures of Russian culture O. Pushkin and P. Tchaikovsky, Polish composer K. Shimanovsky belong to the Kamyansky State Historical and Cultural Reserve. A unique monument of garden art is the dendrological park "Sofiyivka" in Uman. In Uman, where the leader of the Bratslav Hasidim Nakhman was buried, a historical and cultural center was created as a place of pilgrimage to world Jewry. In the Talnivskyi district, the monuments of the Trypillia archaeological culture, which are part of the historical and cultural reserve of Trypillian culture, are concentrated.

In the city of Talne there is an architectural monument of the nineteenth century – a hunting castle built in English style.

Conclusions. The literature has yet to conduct a comprehensive comparative study of the regions of Poland and Ukraine, in particular, the Cherkasy region with the Polish provinces.

We made an attempt to conduct an economic-geographic comparative analysis of the studied regions. We came to the conclusion that the natural conditions of the Greater Poland Voivodeship differ from the natural conditions of the Cherkasy region (climatic conditions, soils, inland waters). The common history in certain periods of the existence of states influenced the formation of social relations. The industry of the comparable regions has common and distinctive features. In particular, enterprises of power supply, mechanical engineering work in the Greater Poland Voivodeship (Poland) and Cherkasy region (Ukraine). At the same time, in the Cherkasy region there are enterprises of the pharmaceutical, chemical industry. In Wielkopolska voivodeship there are metallurgical, mining enterprises.

So, regions of Poland. This estimate is based on the following indicators: the size of the region, the population, including employment, the rate of GDP growth and its share per inhabitant, the level we have investigated that the Greater Poland Voivodeship belongs to the strongest of industrial development, the pace of transformation, the dominant role of the private sector in the economy. An analysis of these indicators, conducted at the Institute for Market Economy Studies, shows that the Greater Poland is in the leading group of the best regions of the country. Cherkasy region belongs to agrarian-industrial regions of Ukraine. The formation of a civil society opens up broad preconditions for the development of industry and commodity products. Improving the assessment of social and economic development indicators, which was conducted in six areas: Financial self-sufficiency, Infrastructure development, Investment development and foreign economic cooperation, Labor market efficiency, Renewable energy and energy efficiency, and Economic efficiency about democratic progress and increase of investment attractiveness of the region. Study of comparative characteristics of socio-economic progress of regions of Ukraine and regions of Poland; The issue of Polish-Ukrainian relations in the field of education, culture, science will be the subject of our next inquiries.

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Надійшла до редколегії 09.03.2019 р.

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UDC 911.3:796.5 (477.52)

DOI: 10.26565/2076-1333-2019-26-04

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INDUSTRIAL TOURISM IN SUMY REGION: RESOURCES AND PERSPECTIVES

The essence of industrial tourism as well as the volume of terms “production tourism” and “industrial tourism” are considered. The regional features of the clustering process of the tourism services market are studied and the ways of its intensification are demonstrated. The sectoral and territorial structure of the industrial tourism in the Sumy region is characterized. In the context of industrial tourism, the Sumy region is a diversified complex that combines large-sized and medium-sized industrial enterprises which are specialized in extraction of energy resources, the development of machinery, the chemical and petrochemical industry, and the processing of agricultural products. Taking into account the geographical peculiarities, six industrial tourism clusters (ITCs) are selected in the area of the Sumy region, i.e. territorial combinations of industrial, agricultural, transport or service enterprises that have a tourist attraction and conduct excursions to their production sites. In addition, the cluster should include necessary elements of the tourist infrastructure (transport, hotel-restaurant, information infrastructure etc.). Detailed sectoral characteristics of each industrial tourism clusters and their specialization are presented.

It was defined that the industrial tourism cluster (ITC) of Sumy (the city of Sumy, and Sumy, Lebedyn, Bilopillia and Krasnopillia districts) specializes in such segments as machine building tourism, chemical industry tourism, light industry tourism, food industry tourism, agro-industrial tourism, construction industry tourism and power industry tourism. Concerning Okhtyrka-Trostanets ITC (including Okhtyrka, Trostanets, and Velyka Pysarivka districts), the most developed segments are mining tourism, light industry tourism, food industry tourism, and construction industry tourism. Romny ITC (Romny, Lypova Dolyna and Nedryhailiv districts) includes food industry tourism, light industry tourism, construction industry tourism and machine building tourism segments. Konotop ITC (Konotop, Krolevets and Buryń districts) is best represented by the machine building industry tourism and food industry tourism segments. The specialization of the Hlukhiv-Putyvl' ITC (Hlukhiv and Putyvl' districts) is special. This is the least promising ITC for the development of industrial tourism. Instead, it has developed pilgrimage, historical, cultural and other tourism segments. Shostka ITC (Shostka, Yampil' and Sredna-Buda districts) includes chemical industrial tourism, food industry tourism, machine building tourism, and forestry tourism segments.

Keywords: industrial tourism, industrial tourism cluster (ITC), excursion, enterprise, Sumy region.

Олеся Корнус, Сергій Сюткін, Анатолій Корнус. ВИРОБНИЧИЙ ТУРИЗМ У СУМСЬКІЙ ОБЛАСТІ: РЕСУРСИ І ПЕРСПЕКТИВИ

У статті розглянуто сутність виробничого туризму і зміст понять «виробничий туризм» та «індустріальний туризм». Вивчено регіональні особливості процесу кластеризації ринку туристичних послуг та обґрунтовано шляхи його інтенсифікації. Охарактеризовано галузеву і територіальну структуру виробничого туризму в Сумській області. З урахуванням географічної специфіки, на території Сумської області виділено шість виробничо-туристичних кластерів (ВТК) – територіальних поєднань підприємств промисловості, сільського господарства транспорту чи сфери послуг, які мають туристичну привабливість та проводять екскурсії на свої виробництва. Межі кластерів проведені згідно адміністративно-територіального поділу, але є достатньо умовними, адже їх реальні межі постійно змінюються, оскільки з'являються нові підприємства, розвиваються нові напрями виробничо-туристичної діяльності, змінюються маршрути транспортного сполучення. Подано детальну галузеву характеристику кожного виробничо-туристичного кластера, встановлено їх спеціалізацію.

Так, у Сумському ВТК виділені машинобудівельно-туристичний, хімічнопромислово-туристичний, легкопромислово-туристичний, харчово-туристичний, харчопромислово-туристичний та ін. Охтирсько-Тростянецький ВТК вирізняється розвитком добувної та харчової промисловості. Роменський ВТК включає харчопромислово-, легкопромислово-булівельнопромислово- та машинобудівельно-туристичний сегменти. Конотопський ВТК – машинобудівельно- та харчопромислово-туристичний сегменти. Глухівсько-Путівльський ВТК має легкопромислово-туристичний сегмент. У Шосткинський ВТК входить хімічнопромислово- туристичний, харчопромислово-туристичний, машинобудівельно-туристичний та лісгосподарсько-туристичний сегменти.

Ключові слова: виробничий туризм, виробничо-туристичний кластер, екскурсія, підприємство, Сумська область.

Олеся Корнус, Сергей Сюткин, Анатолий Корнус. ПРОИЗВОДСТВЕННЫЙ ТУРИЗМ В СУМСКОЙ ОБЛАСТИ: РЕСУРСЫ И ПЕРСПЕКТИВЫ

Рассмотрена сущность производственного туризма и объём понятий «производственный туризм» и «индустриальный туризм». Изучены региональные особенности процесса кластеризации рынка туристических услуг и обоснованы пути его интенсификации. Охарактеризованы отраслевая и территориальная структуры производственного туризма в Сумской области. С учетом географической специфики, на территории Сумской области выделено шесть производственно-туристических кластеров (ПТК) – территориальных сочетаний предприятий промышленности, сельского хозяйства, транспорта или сферы услуг, которые имеют туристическую привлекательность и проводят экскурсии на свои производства. Границы кластеров проведены согласно административно-территориального деления, но достаточно условны, ведь их реальные границы постоянно меняются, поскольку появляются новые предприятия, развиваются новые направления производственно-туристической деятельности, изменяются маршруты транспортного сообщения. Представлена подробная отраслевая характеристика каждого производственно-туристического кластера, определена их специализация.

Так, в Сумском ПТК выделены машиностроительный туристический, химикопромышленно-туристический, легкопромышленно-туристический, пищепромышленно-туристический и др. Ахтырско-Гростянецкий ПТК отличается развитием майнингово-туристического и пищепромышленно-туристического сегментов. Роменский ПТК включает пищепромышленно-, легкопромышленно-, стойпромышленно- и машиностроительно-туристический сегменты. Конопольский ОТК – машиностроительно-туристический и пищепромышленно-туристический сегменты. В Глуховско-Путивльском ПТК преобладает легкопромышленно-туристический сегмент. В состав Шосткинского ПТК входят химикопромышленно-туристический, пищепромышленно-туристический, машиностроительно-туристический и лесопромышленно-туристический сегменты.

Ключевые слова: производственный туризм, производственно-туристический кластер, экскурсия, предприятие, Сумская область.

Problem statement. As a result of the gradual increase of living standards and an increase of leisure time, in many countries and regions there is a steady trend of growth in tourism. This prompts people to find new places and types of tourism. This phenomenon is social in its genesis, and diversification of types of tourism is a vivid sign nowadays. The emergence of industrial (production, manufacturing) tourism is just one of the manifestations of this objective process. Ukraine and Sumy region, in particular, fit into these global trends. This research is dedicated to the identification of local peculiarities, since tourism and recreational activities are differentiated geographically and organically associated with the properties of the geographical environment.

Review of recent publications. Despite the significant theoretical and methodological explanation for the development of industrial tourism in Ukraine (O.O. Beydyk, L.I. Zelens'ka, V.L. Kazakov, T.A. Kazakova, V.S. Patsyuk etc.), in many publications the problem of wrong identification of tourism and recreational activities with entertainment only [22; 24] is highlighted. However, industrial tourism has significant opportunities for assimilation of cultural, historical and social values [7; 19; 25] and for realization of spiritual and cultural needs. These are the needs of knowledge in the broadest sense, up to the knowledge about the world around us and searching for the place in it, for the meaning and purpose of our existence.

It is important to highlight that industrial tourism can become a vital means of ideological, political and patriotic education of the population. Actually, the origin of domestic tourism in most countries of the world, as a rule, was associated with the patriotic movement, the upbringing of love for the Motherland by learning more about the historical monuments, outstanding technical objects, original production skills, etc. Tourism is not only seaside tours, national parks visits or safari in African savannah. At the end of the twentieth century, there were not that much places left in the world that could surprise. This fact contributed to the development of new varieties of tourism, including industrial one. Basically, you can go to an industrial enterprise with a special tourist goal (business, professional, cognitive, environ-

mental, educational one, for vocational guidance). It even has become a trend to visit abandoned production sites, especially those associated with famous events. In Ukraine, trips to the Chernobyl Nuclear Power Plant (ChNPP) are now very popular. In addition to visiting the ChNPP itself, the tour program includes a tour of the city of Prypiyat and visits to villages, where locals, “self-settlers”, offer for the tourists to taste Ukrainian borshch and bread with fat [32].

Industrial (production) tourism is defined differently by different authors, but for all, there is a general view on its active character, the orientation towards the satisfaction of cognitive (including educational purposes), professional and business interests, as well as the possibility of visiting both functioning and non-operating enterprises. It is also important that most types of tourism have a seasonal nature (due to both natural and socio-economic factors), which creates a number of social and economic problems. The advantages of industrial tourism consist in its year-round nature, although there may be some unevenness of the recreational flow.

In Ukraine, the terms “industrial” and “production” tourism are actually used as synonyms [6; 7; 13; 19, etc.], although the latter is somewhat broader, as the term “production” combines all aspects of human economic activity, including agriculture, forestry, services cluster, etc. In the works of Belarusian researchers [1] we encounter more often the term “industrial tourism” in this context, which is more adequate definition for the Slavic countries.

The current stage of development of the world economy has demonstrated a number of examples where the old industrial areas did not withstand the competition of other countries (regions) with cheap labor force and new technologies, and therefore the industry gradually ceased. But the first coal mines, railways and locomotives or shipyards, which were saved in the museums, attracted many tourists and facilitated a rather painful restructuring of the economy. Such experience has been accumulated in the old industrial regions of Great Britain, Germany, Poland and other countries [22]. H.H. Savina with co-authors [20] devoted their article to the urgent issues of the formation of a positive image of

industrial enterprises and territories through the introduction and development of tourism activities, taking into account foreign and domestic experience.

Ye.Yu. Kolosynskyi and N.I. Kolosynska developed the concept of the development of industrial tourism in Ukraine [8]. An important positive aspect of the proposed concept is the attempt of its authors to change the widespread misconception of tourism and industry as incompatible spheres of life. The systematic discussion of theoretical and practical experience of the establishment of industrial tourism in Ukraine was launched at the First International Scientific and Practical Forum "Industrial Tourism: Realities and Prospects" (Kryviy Rih, 2013 [5]), where approaches to the classification of forms and types of industrial tourism were considered, leading trends of its development, peculiarities of the organization, key problems of the current stage of functioning of the domestic tourist market of Ukraine were discussed, etc.

But the phenomenon of industrial tourism requires much more effort, particularly in the area of studying its regional aspects. One of the first attempts to identify promising areas of industrial tourism in Ukraine is the work of V.H. Kulesh [13], however, there is absolutely no information about Sumy region.

The cluster approach to the development of national economies has long been used in the USA, Canada, Italy, the Netherlands, and New Zealand. In Ukraine at the beginning of the 21st century, the need for clustering the economy started to be discussed as well. The analysis of the world experience of increasing the tourist competitiveness of the regions through the implementation of the cluster policy of regional development and reasoning the purposeful creation of territorial tourism clusters for increasing the competitiveness of the regions of Ukraine deserves extra attention and is made by T.O. Tymoshenko [27]. In general, the question of the introduction of cluster models has the high interest among the scholars from various fields of knowledge for a quite long time [2; 27]. Tourism clusters are forming groups of enterprises that are geographically concentrated within a certain region, which share tourism resources, specialized tourism infrastructure, local labor markets, perform joint marketing, advertising and information activities.

A.A. Terebukh and N.B. Bandura define the tourism cluster as "a system of intensive industrial technological and informational interaction of tourism enterprises, suppliers of basic and additional services aimed at creating of a common tourism product" [26, p. 266]. In this publication, among the pioneers of the creation of cluster structures in Ukraine, authors mention the Sumy region as well. Further accumulation of experience can occur through the creation of experimental microclusters (it is known that the geographic scale of clusters can vary considerably), including tourism cluster.

The aim of the article is to analyze the industrial and territorial structure of industrial tourism in the Sumy region and to describe the ways of its intensification, study regional features of the clustering process of the tourism market, promotion of the Sumy region in the tourism market, etc. the last but not least, an important empirical component of this study is satisfaction of cognitive queries of potential tourists.

Presenting of the main material. The beginnings of industrial tourism are dated from the first half of the twentieth century, when separate enterprises began to organize excursions in their production shops. For example, the company "Peugeot" started to invite the first tourists to their factory in Sochau back in 1930, and "Kronenburg" has opened the doors into its Strasburg Brewery right after the Second World War. A peculiar breakthrough in entrepreneurial consciousness began at the end of the twentieth century. At that time, many enterprises began to open their passages for ordinary citizens, using it as a convenient and easy way to gain consumer confidence, present the quality of products and advantages over competitors, and thus expand their customer base. Excursions to industrial tourism facilities are made by skilled guides (unlike in Ukraine, where their functions are performed by engineers or technologists without proper training).

It is worth mentioning that some experience of the organization of industrial tourism in Ukraine is already accumulated, but the Sumy region, so far, remains a little bit away from this process. In the context of industrial tourism, the Sumy region is a multidisciplinary complex that brings together about 270 large and medium-sized industrial enterprises which specialization is related to the extraction of energy resources, the development of machinery building, the chemical and petrochemical industry, and the processing of agricultural products. There are 378 collective agricultural enterprises and 739 farms operating in the agroindustrial complex of the region [3], activity of which may be of interest to tourists.

Such a large number of potential industrial tourism objects, as well as the territorial heterogeneity of their location, have led to the allocation of industrial tourism clusters, i.e. territorial combinations of industrial enterprises, agriculture, transport or services industry that have a tourism attraction and conduct tours to their production sites. In addition, as part of such cluster, the necessary elements of the tourism infrastructure (transport, hotel and restaurant one, etc.) should be presented.

On the territory of the Sumy region we have allocated six industrial tourism clusters (ITC): Sumy (the town of Sumy, Sumy, Lebedyn, Bilopillia and Krasnopillia districts), Okhtyrka-Trostryanets ITC Okhtyrka, Trostryanets, and Velyka Pysarivka districts), Romny ITC (Romny, Lypova Dolyna and Nedryhailiv districts), Konotop ITC (Konotop, Krolevets and Buryń districts), the Hlukhiv-Putyvl' ITC (Hlukhiv and Putyvl' districts, and Shostka ITC (Shostka, Yampil' and Sredna-Buda districts) (Fig. 1). Defining the cluster boundaries according to the administrative-territorial division is rather conditional, since their real boundaries is constantly changing, since new enterprises are emerging, new directions of industrial tourism activity are developing, transport routes are changing, etc.

Sumy ITC is the largest in the region. Its specialization is industrial (production) tourism, taking into account the presence of more than 300 industrial enterprises from machine building, chemical, light and food industries, which have significant export potential [12]. Therefore, in this ITC it is logical to allocate several segments: machine-building tourism, chemical industry

tourism, light industry tourism, food industry tourism, etc.

Machine building tourism segment. For tourists interested in machine building, it is worth visiting some of the production sites and the museum of PJSC “Sumy Scientific and Production Association”, which until recently was useful to be one of the largest machine-building complexes in Europe producing equipment for the oil, gas, nuclear and chemical industries. For those who would like to experience the atmosphere of the production shops and other “classics” of machine building industry, the great choice will be the PU “Sumy plant “Nasosenergomash”, which specializes in the production of pumping equipment, power units and complex hy-

draulic systems for various branches of energy, metallurgy, pipeline transport, housing and communal services, producing over 600 kinds of serial products. During a tour on the production site, tourists have the opportunity to contemplate the entire technological process of producing pumping and other equipment, ranging from the procurement shop, the molding shop, assembly, etc., up to the painting the final product [11]. The machine-building segment of this cluster includes the NIKMAS Concern, a large industrial-innovative structure whose enterprises specialize in the production of modern high-efficiency and energy-saving compressor equipment and spare parts for it.

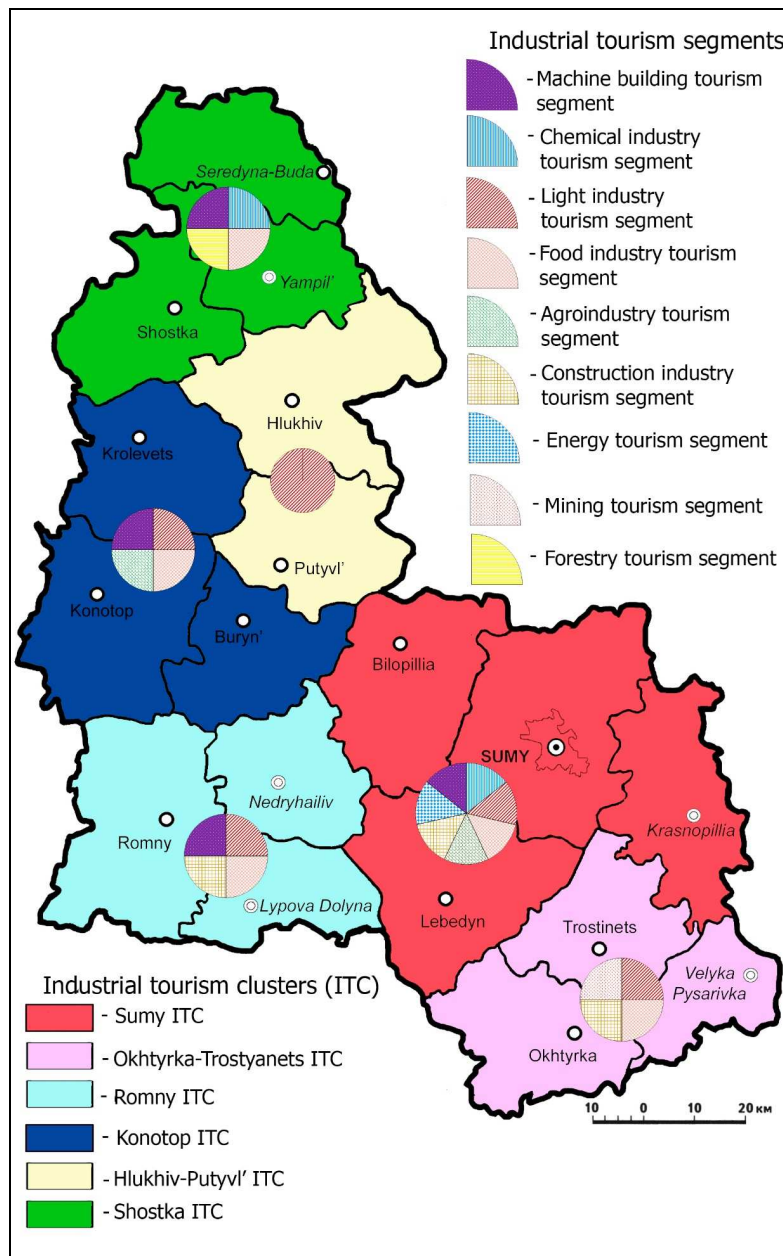


Fig. 1. Industrial tourism clusters of the Sumy region

In addition, this segment includes LLC “Ukrtranspnevmatyka” from Lebedyn, the company is producing brake equipment for rolling stock of the railway. Here tourists can get acquainted with workplace

and working conditions, communicate with employees and administration. Another enterprise, Lebedyn Motor Works “Motor Sich”, is manufacturing water-heating boilers and other equipment.

Chemical industry tourism segment provides excursions to PJSC “Sumykhimprom” where tourists can get acquainted with the production of mineral fertilizers, coagulants and additives to cement, acids, titanium dioxide, powders and other types of chemical products. A museum of the history of PJSC “Sumykhimprom” was created to get acquainted with this enterprise. You can get acquainted with the latest chemical and pharmaceutical technologies at the “KusumPharm” Ltd and Sumy Biological Factory. Due to the need to comply with sanitary norms, the latter is the best enterprise for an industrial excursion. Here one can get acquainted with the production and packaging of vaccines and other drugs used in agriculture [11].

Light industry tourism segment is represented by sewing and footwear producing enterprises. Sumy House of Models of Petro Soroka is presenting for their tourists the technology of creating clothes, from modeling of future products on the computer and cutting fabrics, to sewing and decorating the finished product. Not least interesting is the visit to PJSC “Lebedyn sewing factory”, where up to 3000 pieces of men's shirts and other products are being sewed per day. Today it is a modern enterprise, using with the best examples of domestic and foreign equipment in its production.

At the OJSC “Shoe factory “Remvzuttia” you can see the whole technological process of manufacturing leather shoes from modeling to finished products. And it is possible to buy it in a store that works at the factory. More modern production of footwear is presented at the “Premium Star” LLC (Sumy), which production is exclusively for export, specializing on leather shoes, sneakers and moccasins under the brand name of the Italian company “Grisport” ordered from the EU. However, excursions to this company are not organized yet.

The peculiarity of *the food industry tourism segment* is the difficulties of visiting due to sanitary requirements. The enterprise that freely conducts production excursions to its plant is LLC “Horobyna”, the only manufacturer of alcoholic beverages in the Sumy region. The enterprise constantly improves the technological processes of the alcoholic beverages production and shows the whole technological scheme for the production of alcoholic beverages under various trademarks. There is optional tasting at the end of the tour as well. Another interesting touristic company is “Guala Closures Ukraine”, which specializes in the production of a wide range of cortical materials used in the food industry [11].

With the organization of production in the fish processing industry you can familiarize yourself at the Sumy enterprise PE R.N. Koolemza (TM “Fish King”), which deals with the processing of raw fish (drying, smoking), the production of preserves and salads. There is an opportunity to visit the smoking, preservation and drying shops, as well as refrigerators and freezers. The “Eco-product plant” Ltd. (the village of Ivolzhanske, Sumy region) provides an opportunity to get acquainted with the production of beer and mineral water, which is made using the equipment of the Israeli firm “I.E.C. Engineering” and Italian firm “B.M. Beregy”. Near the city there is a modern enterprise PJSC “Sumy food products factory” (the village of Bezdrík), which is producing mayonnaise, oil under the trademark “Olivia”. Belopillia

Pasta Factory is producing not only pasta, but also groats and flour. The factory operates in two shifts, producing 8 tons of finished products per day.

In the agroindustry tourism segment there is an interesting tourist object, which is Stepanivka elevator of “Agroterminal Construction” Ltd, the largest elevator in Ukraine, which is part of the UkrLandFarming DK. The capacity of one-time storage of 488 thousand tons of grain is that in 15 hours can ship 54 grain-carriages. There are 6 grain dryers on the elevator, which are drying 40 tons of grain per hour [23]. Vorozhba Ltd. (town of Vorozhba) is a meat processing company, which is conducting slaughter of cattle, storage, processing and sale of meat, by-products, raw materials, producing more than 80 types of semi-finished products, sausages and smoked products using modern technologies. Also, tourists have an opportunity to visit an ostrich farm near Sumy in the village Verhnia Syrovatka, where you can see exotic birds, ride them and feed them with bread by hand. In May, with steady hot weather, you can taste an omelet made of an ostrich egg. In addition to ostriches there are many different animals and birds, including beavers, hares, foxes, storks, pheasants, etc. You can do fishing in the water reservoirs of the farm as well.

Among the enterprises of *the construction industry tourism segment* you can visit “Kerameya” Ltd (Sumy), a successful enterprise that is dynamically developing and becoming a leader in the market of building ceramic materials in Ukraine, expanding export markets, gaining popularity and recognition. The same applies to “Mykhailivsky Refractories” LLC (Krasnopilsky district), a manufacturer of lightweight refractory products.

Interesting objects of this ITC are the objects of the energy tourism segment, –small-scale power enterprises: Nyzivska hydropower plant (Sumy district) and Bobrovska and Mykhailivska hydropower plants (Lebedyn district), which are located on the Psel river.

Okhtyrka-Trostryanets ITC is characterized by the development of extractive and food industries, which create corresponding segments of industrial tourism here.

Mining tourism segment. Nowadays Okhtyrka is known as the largest center of the oil and gas industry, which extracts up to 50% of all oil in Ukraine. The local oil and gas mining enterprise “OkhtyrkaNaftogaz” is working on 26 oil and gas fields, some of which can be visited for tourism purposes. In addition, the workers of Okhtyrka local lore museum developed a tour “Okhtyrka as an oil capital of Ukraine”.

In the light industry tourism segment, JSC Okhtyrka sewing factory” is one of the most interesting industrial objects for tourists. Its main products are suits, trousers, jackets, women's coats, skirts, bathrobes, mittens, slippers, blankets, as well as military uniforms, including clothing for the British Royal Guard (coats, trousers, jackets). The factory is equipped with a modern fleet of sewing universal and specialized equipment from firms “Siruba”, “Juki”, “Singer”, “Durkopp”, embroidery machines, wet and heat treatment equipment from firms “Veite”, “Silter”, “Malkan”, duplicating press from firm “Kannegiesser”, which makes it possible to execute orders quickly and with a high quality [18].

Food industry tourism segment. For lovers of beer tourism it is worth to offer an excursion to OJSC “Okhtyrka Brewery”, which is engaged in the production of not only beer, but also soda water and beverages TM “Obolon” (for example, “Zhyvchyk”). At the brewery, the tourists will get acquainted with the technological processes of sprouting hops, preparing malt and wort, mixing water with malt components with the formation of a bite, whisking and preparation for fermentation, maturation, filtration and spill. In addition, tourists can learn about the process equipment, namely, drill and burner boilers, plate coolers, yeast tanks, cylinder-conical tanks, separators, hydrocyclones, filters, bottling and packaging machines.

However, the most famous enterprise in the food industry segment is the “Mondelis Ukraine” chocolate factory, known for its trademarks “Korona”, “Ukraine”, “Milka” and others. The factory is located in Trostyanets, a district center, which recently became known as the tourist pearl of Sumy region. The highway Hlukhiv-Kharkiv and railway connection Vorozhba-Sumy-Kharkiv pass through the city. The local railway station Smorodino is one of the major railway hubs in the Sumy region, which improves tourist logistics. “Mondelis Ukraine” has one of the leading places on the market of chocolate products in Ukraine, has a closed cycle of chocolate production, from processing cocoa beans to packaging of finished goods and shipment. The factory also has packaging of coffee “Jacobs” and “Carte Noire” on its premises.

In 2016, a new biscuit shop for the production of Oreo cookies was launched here [28]. At the initiative of the chocolate factory in Trostyanets in 2012 a museum of chocolate was opened, which is divided into three halls, “Korona”, “Milka” and “Jacobs”. In total, the museum presents 1576 exhibits, including heavyweight chocolate products (certain sweets weigh around 30 kg). The tour includes the presentation of the story of the creation of chocolate and coffee, as some types of chocolate are made with the addition of this fragrant ingredient, as well as demonstration of the unique wrappers that are not produced by manufacturers anymore. The museum presents not only chocolate in its usual form of tiles, but also real delicious masterpieces in the form of various figures. The museum is located in an old aristocratic manor house, along with a picture gallery and local lore museum [17]. There is the administration of the NNP “Getmansky” located closely, where tourists could familiarize with the peculiarities of the creation and operation of the park.

Okhtyrka-Trostyanets ITC also includes *the construction industry tourism segment*, which is represented by the brick factory “VKP Notehs” Ltd. (Velyka Py-sarivka town). Visiting this factory will allow you to get acquainted with the technology of producing bricks, up to 2.5 million pieces a year. Ceramic brick is made from clay extracted from the local quarry and meets all the requirements for quality and environmental needs [31].

Romny ITC includes food industry, light industry, construction industry, and machine building tourism segments. There is one interesting fact and object of the visit, which is mount Zolotukha, near Romny, where in

1937 the first oil in the Left Bank of Ukraine was extracted [10].

Food industry tourism segment. One of the most attractive enterprises in the context of industrial tourism is “Romny Food Products” LLC, one of the largest enterprises in Ukraine that produces marmalade-pasty confectionery products, in particular marshmallows. The company's products under the TM “Romny-confectioner” (gingerbread, oatmeal cookies, crackers, toasts, cakes and pastries) are in demand both in the national and international markets. Also in the city there are other enterprises of the food industry, for example, “Romny Dairy Plant” of PE “Ros” (is the part of “Milkiland-Ukraine”). Nowadays, the company preserves raw materials and produces hard cheeses, such as “Boyarsky”, “Staroslovyansky”, “King Arthur”, “Richard”, “Russian”, as well butters “Vologodske” (fat content 82.5%), “Extra” (82.5%), “Romenske” (73%), “Dobryana” (73%), dry skim milk, dry whole milk. In general, the company processes 75.500 tons of milk a year [30].

Light industry tourism segment. Until recently, Romny was a well-known center for light industry and in some sources it was called the capital of light industry of Ukraine. Although even nowadays the percentage of city enterprises in the production of curtain-tulle products in Ukraine is 75%, and footwear 34% [14]. PJSC “Romny Gardene-Tile Factory” is the only producer of curtain-tulle fabrics in Ukraine. The main area of activity is the production of curtain underlying paintings and pieces of them from jacquard fabrics, curtain fabrics, lace fabrics, curtains for the kitchen, sets of curtains for rooms, tablecloths, napkins, bedspreads, ritual funeral wares. Products and production technology the tourists can discover by visiting the workshops of this company [10]. Romny LLC “Talanprom” produces special footwear for the armed forces and other law enforcement agencies. The production is popular among some units of “Ukrzaliznytsia”, “MittalSteel Kryviy Rih”, PJSC “Ukrnafta”, metallurgical plants, etc. [25].

Among the enterprises of *the construction industry tourism segment*, JSC “Slobozhanska Construction Ceramics” is the largest manufacturer of wall ceramic materials, which takes over 40% of the Ukrainian market of wall ceramic bricks and 12% of the total Ukrainian brick market in terms of sales [25].

As part of *the machine-building tourism segment*, the Romny PJSC “Tutkovsky Plant” specializing in the manufacture of geological exploration equipment, drilling tools and spare parts for the oil and gas complex, as well as mobile carriages of buildings of various sizes and modifications, modular objects, should be named. But the most interesting object of this tourism segment is LLC “Kobzarenko Plant” (Lypova Dolyna town), which ranks first in Ukraine in production of tractor trailers, as well as reloading bins, tanks for water, livestock and plant protection products. During the visit to production facilities, tourists can get acquainted with the production process, stages of production of modern agricultural machinery, state of the art equipment of the plant, welding works, machine tools and automatic machines, metal cutting plants. Tourists have an opportunity to observe how the metalwork and assembly works nowadays, as well as the process of assembly, installation, assembly of

spare parts and mechanisms. Also tourists have the opportunity to visit a new and modern sports hall of the plant with a lot of sports equipment.

Konotop ITC has a favorable transport and geographical location. The center of ITC is the city of Konotop, which is a major railway hub that provides freight and passenger transportation in 7 directions, including Moscow, Kyiv, Kharkiv, Gomel, Kursk, Poltava, Vitebsk. The 9th International Transport Corridor passes through the city as well. The city is connected with Kyiv and the regional centers – the cities of Sumy and Chernihiv by suburban transport system. This makes it advantageously different from other cities in the Sumy region. The leading segments in this cluster are *machine-building industry tourism* and *food industry tourism segments*.

The first of these should include LLC “Motordetal-Konotop”, the largest plant in Europe specializing in the manufacturing of cylinder liners for automotive, tractor, ship, diesel and stationary internal combustion engines. The vast majority of operations are carried out on modern equipment of world manufacturers. A production system of lean manufacturing was introduced on the “Motordetal-Konotop” (analogue of the system of defect-free production, created by “Toyota”). This allows to have the production of the highest class [16]. PJSC “Konotop Armature Plant” manufactures high-pressure steel pipe fittings, as well as forgings of carbon and alloyed steels weighing up to 2000 kg, volumetric stamping of various configurations weighing up to 250 kg [9]. Visit to the locomotive depot of Konotop must be of a high interest. Here you can see the exposition of the museum of the regional branch of the South-Western Railway and get acquainted with the work of the repair shop.

Among the enterprises of the *food industry tourism segment* in this ITC Dubovyazivka bakery plant must be mentioned, which holds excursions to its production site. Here you can see the unique equipment that allows you to make bread without human hands, learn all about the work of specialists, and trace the entire process of making bakery products. The highlight of the program is a small master class and degustation of freshly baked bread from the enterprise. This segment is also includes Buryn’ dry milk factory PJSC “Wimm-Bill-Dann Ukraine”. The products of this factory are known not only in Ukraine but also in Russia, Georgia, and Armenia.

An interesting attraction would be visiting a private horse farm in the village of Zholdaky, Konotop district. The lodge of green tourism “Northern Forest” is located here on the basis of the horse farm “Akhalkynets of Ukraine”, which breeds horses. The manor has all the conditions for a wonderful holiday. Horseback riding, hunting, fishing on the river Seym, active sports activities are organized for guests.

The unique object in this ITC, which is worth visiting as well, is the Krolevets factory “Art weaving”, the manufacturer of artistic decorative woven artificial products and fabrics (towels, bedspreads, table linen, bed linen, etc.). The factory has a room-museum, where products of masters of the previous centuries are stored. Nowadays Krolevets towels still remain popular, they

are often used by ministries and banks, firms and enterprises as souvenirs for meetings at different levels, gifts.

Hlukhiv-Putyvl’ ITC is distinguished by the fact that both of its centers have the status of state historical and cultural reserves. But in addition to historical and architectural monuments, they can interest visitors by the objects of specific segments of industrial tourism, including *scientific tourism*, *museum tourism*, and *spiritual tourism*. For example, in Hlukhiv there is a unique research and production institution of the Institute of Buhonic Cultures of the National Academy of Sciences of Ukraine. It is one of the oldest research institutions of the state, organized on the basis of the Ukrainian research station of bouillon cultures, in 1931 as the All-Union Scientific Research Institute of Hemp, where they created such sorts, which do not contain narcotic substances. The institute has a room-museum of bouillon cultures, where a small exhibition of hemp products is presented, including ropes, fabrics, clothes, shoes, etc. In addition, the institute itself is located in the old Tereshchenko's house (built in around 1870), which is the oldest preserved architectural heritage of the family of famous sugar-growers and patrons. The interior of the house partially preserved the original decoration, such as stucco ceilings, carved doors, tiled stoves, as well as stairs to the second floor, made in the style of cast iron decorative casting.

The *light industry tourism segment* in Hlukhiv is represented by one of the unique enterprises of Ukraine, the company “Linen of Desna”. The enterprise has a full cycle of production from flax growing and technical hemp, primary processing of linen and hemp raw material to finished products (twine, ropes, fuel briquettes, spreading heater, since 2016 linen cloth). Fibers are sold to countries in Europe and Asia for the needs of spinning and textile enterprises, the rest is processed on its own cotton mill. The town of Putyvl’ is the tourist pearl of Sumy, famous for its monasteries and museums, and successfully complements the tourist attractions of Hlukhiv.

Shostka ITC is one of the first that has entered the path of cluster relations, the industrial park “Svema” has been created on the territory of the city, an industrial site, which is used for production needs by several independent enterprises from different industries. After closing “Svema” hundreds of buildings fully equipped with engineering items became unoccupied. During the period of operation of the park, a large volume of work on the construction, reconstruction of engineering and transport infrastructure, road surface and street lighting, adjacent territory was carried out. Among the advantages of the industrial park is the reduction of investment development time, the use of scientific potential of local educational institutions, the availability of a customs post, and the involvement of creative experts in the implementation of investment projects. Here a new educational-laboratory complex of the Shostka Institute of Sumy State University with a business incubator, an electronic library, and sports grounds was built [4].

The *chemical industry tourism segment* remains the main in this cluster. Interesting for tourists is PJSC “Farmak”, whose production base was established in 2002. During the excursion tourists can learn about the

history of the enterprise, which for several years produced a monoprodukt, mebhydrolin (a substance for the production of the finished medicine diazolin) and was the only one on the territory CIS to produce this substance, which has antihistamines properties. Tourists have the opportunity to visit production shop for active pharmaceutical ingredients and to see the cleaning buildings at PJS "Farmak". It is also possible to visit a local waste sorting site. In addition, they can learn what GMP is (Good Manufacturing Practice) and how medicines are produced [29].

In the food industry tourism segment PE "Rubanik" has to be mentioned, which has been working on the pasta market for more than 10 years and offers a wide assortment (more than 20 types) of pasta of different shapes in packaging of 1 and 3 kg, marked by the slogan "Made in Sumy region" [15]. "Bell" Shostka Ukraine" is a major enterprise, a well-known leader in domestic cheese making. Also this segment includes SPE "Praid" (the village of Ostroushky, Shostka district) specializing in canning of fish and vegetable products.

The machine-building tourism segment of this cluster is formed by the enterprises of the Yampil' district, in particular "Svesa pumping plant", located in the town of Svesa. It is one of the oldest enterprises in the Sumy region, created in 1858 as separate casting and mechanical plants of the titular adviser M.M. Nepliev. The plant produces about 200 brands of various pumping equipment.

The peculiarity of this ITC is the wide development of the forestry tourism segment. State enterprises "Seredyna-Buda forestry" and "Seredyna-Buda agrolishosp" deserve particular attention in this segment. In addition to various productions associated with preparation and processing of wood, enterprises are engaged in the organization of sports hunting.

Conclusions. Spatial-temporal dynamics of recreational needs of a person is a socio-historical product, as they may vary in time, which is reflected in the territorial

forms of the organization of tourism and recreational activities. Therefore, the study of recreational needs and resources for its implementation is necessary for studying the forms of territorial organization of recreational areas of all ranks and scales (both existing and prospective). In today's conditions (due to an increase in the cultural and educational level of the population), the need for recreational and cognitive activity is growing rapidly. One of the key elements of such activity is industrial tourism, the significant advantage of which is its versatility. The development of this type of tourism in Sumy, as a form of cooperation between the producers of goods and services, on the one hand, and tourism segment, on the other hand, is only beginning, therefore, needs further study.

The optimal form of such cooperation is industrial tourism clusters, which are quite capable of uniting and absorbing the socio-geographical categories of "territorial recreational complexes" and "tourism and recreational areas".

Therefore, in the Sumy region, six industrial tourism clusters (Sumy, Konotop, Shostka, Romny, Okhtyrka-Trostyanets, Hlukhiv-Putyvl') are quite justified in the current socio-economic conditions. The cluster is a relatively new tool for improving the region's tourism competitiveness and a unique catalyst for the development of specific sectors of the economy. However, the sphere of industrial tourism does not yet have a generally accepted methodology for organizing cluster structures and requires serious marketing research, in which we see the prospect of further scientific research on this topic.

The preliminary inventory of the objects of industrial tourism conducted in this article is a step towards further study of tourism opportunities in Sumy region and the creation of innovative tourism clusters, the formation of which will have a positive impact on the pace of modernization of the economic structure of the region and will contribute to increasing its tourist competitiveness.

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Надійшла до редколегії 01.04.2019 р.

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UDC 911.3: 338.48-44 (593-22)

DOI: 10.26565/2076-1333-2019-26-05

Nirundon Tapachai*Assistant Professor, Doctor of Business Administration, Director of International MBA Program**e-mail: natapachai@yahoo.com, ORCID ID: <https://orcid.org/0000-0002-4855-5641>**Kasetsart University, 50 Paholyothin Road, Jatujak, Bangkok, 10900, Thailand***APPLYING A TOURISM MICRO CLUSTER MODEL TO RURAL DEVELOPMENT PLANNING: A CASE STUDY OF KAENG RUANG VILLAGE IN THAILAND**

In Thailand, agriculture still plays an important role in the rural economy but is facing several problems resulting in poverty in rural settings. Tourism can play an important role in improving a rural economy in some areas. This paper proposes employing the tourism micro cluster model to address poverty in a poor village in the northeastern part of Thailand. The study also addressed the theoretical foundation of a tourism micro cluster model for a rural village in Thailand that applies concepts derived from a board literature review. Data were collected through both qualitative and quantitative methods to gain insights about problems and potentials for tourism development in the village. The proposed model is built from analyzed data and in the light of resource-based view, clustering theory, and the Thai King's sufficiency economy philosophy. The proposed tourism cluster is consisted by four complementary businesses including homestay, marked trekking, adventure trekking, and processed malva nut products.

In light of our analysis, it is evident that tourism clustering is feasible in the context of this locality. The studied village has sufficient resources both tangible and intangible resources possible for planned tourism micro cluster development. However, an attempt at cluster development in the studied village would require an intervention to provide technical assistance from concerned parties e.g. local government in the early stage to build capacity building of local people for running businesses independently and sustainably. Although one of the limitations of this study is to focus on only one village, the case study of Kaeng Ruang village can provide contextual insight and meaningful implications for policymakers when considering clustering as a planned destination development strategy.

Keywords: rural development, tourism micro cluster, resource-based view model, clustering theory, sufficiency economy philosophy.

Нірундон Тапачай. ЗАСТОСУВАННЯ МІКРОКЛАСТЕРНОЇ МОДЕЛІ ТУРИЗМУ ДЛЯ ПЛАНУВАННЯ СІЛЬСЬКОГО РОЗВИТКУ: ДОСЛІДЖЕННЯ НА ПРИКЛАДІ СЕЛИЩА КАЕНГ РУАНГ У ТАЙЛАНДІ

У Таїланді сільське господарство все ще відіграє важливу роль у сільській економіці, але стикається з низкою проблем, що призводять до бідності в сільській місцевості. Туризм може відігравати важливу роль у поліпшенні сільської економіки в деяких регіонах. У цій статті пропонується використовувати модель мікрокластерів туризму для вирішення проблеми бідності у бідному селищі у північно-східній частині Таїланду. У дослідженні також розглядається теоретична основа моделі мікрокластерів туризму для сільської місцевості в Таїланді, в якій застосовуються концепції, засновані на огляді літератури. Дані були зібрані як якісними, так і кількісними методами, щоб отримати уявлення про проблеми та можливості розвитку туризму в селищі. Запропонована модель побудована на основі проаналізованих даних та у світлі уявлень про ресурси, теорії кластеризації і філософії економіки достатності. Пропонований туристичний кластер складається з чотирьох взаємодоповнюючих підприємств, включаючи проживання в сім'ї, походи з маркуванням, пригодницькі походи і перероблені продукти з мальви.

У світлі нашого аналізу очевидно, що кластеризація туризму можлива в контексті цієї місцевості. Досліджуване селище має достатні як матеріальні, так і нематеріальні ресурси, можливі для запланованого розвитку мікрокластерів туризму. Однак спроба розвитку кластера в досліджуваному селищі потребує втручання для надання технічної допомоги від зацікавлених сторін, наприклад, місцевого самоврядування на ранній стадії для створення потенціалу для самостійного і стійкого ведення бізнесу. Хоча одне з обмежень даного дослідження полягає в тому, щоб зосередитися тільки на одному поселенні, тематичне дослідження селища Каенг Руанг може надати контекстуальне розуміння і значущі наслідки для політиків при розгляді кластеризації як запланованої стратегії розвитку.

Ключові слова: сільський розвиток, туристичний мікрокластер, ресурсна модель, теорія кластеризації, філософія економіки достатності.

Нірундон Тапачай. ПРИМЕНЕНИЕ МИКРОКЛАСТЕРНОЙ МОДЕЛИ ТУРИЗМА ДЛЯ ПЛАНИРОВАНИЯ СЕЛЬСКОГО РАЗВИТИЯ: ИССЛЕДОВАНИЕ НА ПРИМЕРЕ ПОСЕЛКА КАЕНГ РУАНГ В ТАИЛАНДЕ

В Таиланде сельское хозяйство все еще играет важную роль в сельской экономике, но сталкивается с рядом проблем, приводящих к бедности в сельской местности. Туризм может сыграть важную роль в улучшении сельской экономики в некоторых регионах. В этой статье предлагается использовать модель микрокластера туризма для решения проблемы бедности в бедном поселке в северо-восточной части Таиланда. В исследовании также рассматривается теоретическая основа модели микрокластера туризма для сельской местности в Таиланде, в которой применяются концепции, основанные на обзоре литературы. Данные были собраны как качественными, так и количественными методами, чтобы получить представление о проблемах и возможностях развития туризма в поселке. Предложенная модель построена на основе проанализированных данных и в свете представления о ресурсах, теории кластеризации и философии экономики достаточности. Предлагаемый туристический кластер состоит из четырех взаимодополняющих предприятий, включая проживание в семье, походы с маркировкой, приключенческие походы и переработанные продукты из мальвы.

В свете нашего анализа очевидно, что кластеризация туризма возможна в контексте этой местности. Исследуемый поселок имеет достаточные как материальные, так и нематериальные ресурсы, возможные для запланированного развития микрокластера туризма.

Однако попытка развития кластера в изучаемом поселке потребует вмешательства для оказания технической помощи от заинтересованных сторон, например, местного самоуправления на ранней стадии для создания потенциала для самостоятельного и устойчивого ведения бизнеса. Хотя одно из ограничений данного исследования заключается в том, чтобы сосредоточиться только на одном поселении, тематическое исследование поселка Каенг Руанг может предоставить контекстуальное понимание и значимые последствия для политиков при рассмотрении кластеризации в качестве запланированной стратегии развития.

Ключевые слова: сельское развитие, туристический микрокластер, ресурсная модель, теория кластеризации, философия экономики достаточности.

Introduction. Overall economic development in Thailand has been successful in term of economic expansion. Annual economic growth averaged 7.6% between 1950s and 2000s when per capita income grew sevenfold. Even though the country had also experienced growing inequality, Thailand's Gini coefficient increased steadily over the same period and is highest among countries in the southeast Asian region.

Although the overall poverty situation in Thailand is declining an enormous number of people still live their lives in poverty line. In the year 2016, 5.8 million Thai people were living below the poverty line as reported by Office of the National Economics and Social Development Board (Thansettakij, 2017). Poverty is mostly concentrated in the rural area in the North, Northeast and the South.

Even though the level of diversification of activities in rural areas has been promoted in recent years, agriculture's importance remains critical in many areas of the country. The current situation indicates that the agriculture sector is still suffering from very low productivity, lack of resource base, high cost of production factors, and unstable price of agriculture products impacting on rural incomes and, consequently, the quality of life of rural people.

Rural tourism can be one of the answers to the question of how to generate supplementary income for people in rural areas. The role of tourism in economic and rural development are discussed in several literatures, for instance, Li, Ji, Shi (2018); Grgić et al (2017); Alipour and Varaki (2013); Dimitrovski, Todorovic and Valjarevic (2012). In many areas, rural tourism resources are very rich providing different attractions to tourists which can provide a multi-faceted activity (Acka, 2006). Therefore, promoting and investing in tourism in certain rural areas should be encouraged. However, development of rural tourism should go along with the idea of sustainable development where natural resource exploitation and protection are balanced. Thus, the appropriate approach or model of rural tourism should be examined and justified.

Objectives of the study. The aim of this research is to explore the appropriate development model with a focus on tourism to contribute towards income generating and poverty alleviation in a poor rural village.

The research question in this study is "How can a sustainable model within the tourism field be developed to generate income and reduce poverty for the local people in poor rural village?"

Therefore, the main objective of the study is to develop the possible model of tourism micro clusters for a poor rural village in Thailand.

The role of resource-based view model, clustering theory, and the King of Thailand's philosophy of sufficient economy are among the contributions to the development of the proposed tourism micro cluster model that will be highlighted in this paper.

Theoretical ground for tourism micro cluster model development. Several theories and concepts underlying the proposed tourism micro cluster model are discussed in this section including

1) Resource-based view: Application to rural tourism business development

The Resource Based View (RBV) is originally a managerial concept explaining that a firm's performance is determined by the resources it has at its disposal. The way these resources are used and configured enable the firm to perform and can provide a distinct competitive advantage. Firms are dissimilar due to their heterogeneous resources, so firms can have different strategies because they have different resource mixes.

Although RBV has deep root dated back to the 1930s, the main ground-breaking for the resource-based view development was the work of Barney in 1991. His article "Firm Resources and Sustained Competitive Advantage" defined the main characteristics of resources, explained the link between resources and sustainable competitive advantage, and distinguished between different types of resources as important potential drivers of the performance of firms (Barney, 1991)

The efficacy and suitability of the resource-based view for tourism development in rural area are recognized in previous literature, for example, in the work of Alvesa, Silvab, Salaza (2017); Huy and Khin (2016); Wang (2016); Denicolai, Cioccarelli and Zucchella (2010). Using this RBV concept for a rural village suggests that a single village possesses unique bundle of intangible and intangible resources which can be exploited and configured to create value. Specific value can be created through tourism activities to generate sustainable competitive advantage for each particular village.

In this study, the RBV has contributed to the development of tourism micro cluster model in a specific rural village.

2) Sufficiency Economy Philosophy (SEP)

Sufficiency economy philosophy (SEP) or the 'new theory' was developed by the former King of Thailand with more than 60 years of his hands-on experience in Thai rural development. The philosophy is a new paradigm of development, which aims at improving human well-being as a development goal by focusing on a balanced way of living. Three principles—moderation, reasonableness, and self-immunity (against the risks which arise from internal or external change)—along

with the conditions of morality and knowledge can be applied to any level of society—from an individual, to community, and subsequently to a country. The philosophy of sufficiency economy conveys a new approach in addressing current development challenges, which involve issues for institutions, human capital, environmental sustainability and the role of government. This concept, as drawn from Thailand's Buddhist tradition, emphasizes the "middle way" – the importance of balance. In Buddhism, this middle way, or path, advocates the avoidance of the extremes of sensual pleasure on the one hand, and ascetic denial on the other. The middle, or 'eight-fold' path directs the person towards enlightenment through a World in which everything is in a consistent condition of change and flux.

Implemented in a wide range of projects and geographical areas, the "sufficiency economy" methodology has helped hundreds of thousands of people, especially those in remote areas with few natural advantages. The Thai government incorporated this philosophy into the national development plan, resulting in a positive impact on many areas of development.

SEP should be promoted in Thailand's rural villages as it is an effective guide in project development because SEP approaches are contextually appropriate and realistic. There are several rural development projects that have successfully applied SEP as a guide (Mongsawad, 2010). Barua (2019) studied the impact of Sufficient Economy Philosophy (SEP) on the well-being of Thais using meta-analysis and found a positive correlation between SEP interventions and well-being across six emerging themes: education, social, economics, agriculture, environment, and health. The SEP philosophy has shown to be a path of sustainable development in many contexts. The SEP path of development focuses on a balanced use of material resources, social capital, environmental reserves, and cultural wealth as well as the balanced preservation of these four kinds of resources at all stages and levels of development. (Wibulswasdi et al, 2010)

Therefore, development of tourism businesses in the studied village can employ SEP principles. To do so means that business activities should be practiced on three principles (moderation, reasonableness, and self-immunity) and two conditions (morality and knowledge) as mentioned above. Moderation or modesty means a business should be an appropriate size; that is not too big or small. In other words, a business should have production at a modest level and not take unnecessary risk by borrowing too much money or charging customers excessive prices. Reasonableness means decisions about business must be rational by considering thoroughly the relevant factors and carefully taking into account the expected consequences of proposed activities. Immunity means a business has to prepare itself to respond the environmental changes from by understanding the sensitivities of change by carefully monitoring its environment including customers, market, competitors and other factors. These actions will lead to good and reasonable decisions which will result in good performance and help to avoid any serious problems with the business.

Based on these three principles with two conditions, a business will be concerned with sustainable and stable long-term profits, ethical practices, social and environmental responsibility, and balancing benefit-sharing ethically among all stakeholders.

3) Clustering Theory

A cluster can be defined in different ways. In more general terms, clusters can be defined as a group of firms, related economic actors, and institutions that are located near each other and have reached a sufficient scale to develop specialised expertise, services, resources, suppliers and skills (European commission, 2008). A cluster can be defined differently depending on context. A common element of many cluster definitions is the emphasis on networking and collaboration between companies and institutions as 'groups defined by relationship, rather than membership' (European Commission, 2008).

Clusters often play an important role in industry development as they can stimulate positive economic and social externalities, strengthening industrial innovation, competitiveness and social factors within regions (Ketels, 2013; Porter, 2008). The traditional clustering concept was mainly applied in the context of the manufacturing industry. However, there have been attempts to draw upon similarities with clustering patterns in services industry like tourism. The early work concerning the presence of clustering in tourism-related businesses can be seen in Porter's (1990b, 1998a, 1998b) work, which highlights the mutual dependence of businesses within a tourism destination.

The suitability of cluster theory in tourism development was discussed by several researchers including Jackson and Murphy (2002, 2006), Nordin (2003), Miller and Gibson (2005), Jackson (2006), Lade (2006), Laing and Lewis (2017), Sigurðardóttir and Steinhórnsson (2018). They all agreed that the cluster-approach is an appropriate lens for development of tourist destinations. Michael (2008) posited a critical role of clustering theory in tourism development especially for communities that intend to build or enhance a tourism function as a component of their economic strategy. A cluster-based approach to destination development expresses an understanding of interdependence among business players within a region as a synergy which means the whole is greater than the sum of its parts. Moric (2014) added that the tourism cluster-approach is considered to be an appropriate strategy in emerging economies and less developed areas.

Study in micro-clusters in tourism was pioneered by Michael (2003). Micro cluster in tourism is identified as a development mechanism that fosters the ability to build a local level of specialisation and competitive advantages for a small tourism destination" (Michael, 2007). The basic assumption of clustering is in that the co-location of both competing and complementary firms is presumed to produce a range of synergies that enhance the growth of market size, employment and product (Michael (2008). He proposed 3 forms of clustering – horizontal, vertical and diagonal.

Horizontal clustering can simply refer to the co-location of like firms in a given geographical area. These firms are competitors as they sell similar products using

similar productive resources, but their co-location pools the potential customer base to increase total sales and generates other advantages in terms of product availability, labor supply, shared information and infrastructure to reduce costs or the effects of externalities. Vertical clustering refers to the relative colocation of an industry's supply chain, where there is an integrated linkage between production stages and consumers that enhances productive specialization. The geographical proximity between firms minimizes logistics and distributional costs and offers other benefits in the form of concentrated labour skills and market information. The last form of proposed clustering is diagonal clustering which is referred to the concentration of complementary (or symbiotic) firms, which each add value to the activities of other firms, even though their products may be quite distinct. In this sense, diagonal clustering brings together firms that supply separate

products and services, effectively creating a bundle that will be consumed as though it was one item.

In this research, a tourism micro cluster is seen as a group of cooperating businesses involved in complementary activities in small rural communities. The concept of diagonal clustering as mentioned above is the underlying principle for micro clustering in this study as it seems suited to symbiotic tourism development in the studied village. This is because the village as a tourism destination relies upon co-operative community enterprises/businesses to supply complementary activities which add value to the tourism experience.

Based on the concept of RBV model, clustering concept, and the sufficiency economy philosophy, the tourism micro cluster model is proposed as shown in figure 1 below.

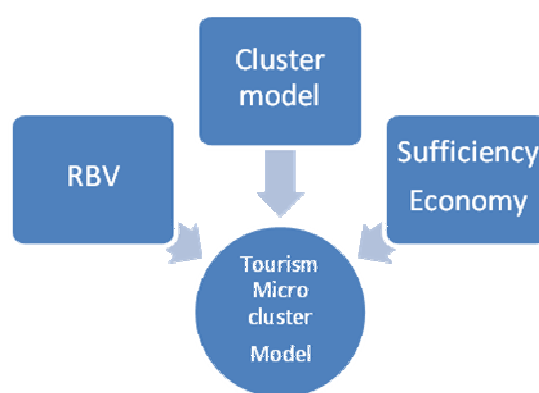


Fig. 1. Contribution of several concepts to tourism micro cluster model

The tourism micro cluster model proposed here is defined as “the concentration of interconnected businesses or income generating activities related to tourism in a rural village which aims to take advantage from local resources and capabilities and to apply sufficiency economy philosophy which means all businesses or income generating activities in the cluster will be conducted in the way which focuses on a balanced way of doing business based on three principles—moderation, reasonableness, and self-immunity along with the conditions of morality and knowledge”.

Methodology. This study adopts an action research methodology as it involves promoting collaborative activities amongst stakeholders (researchers and villagers) searching for ways to reduce poverty within in the participating village. The Kaeng Ruang village or ‘Ban Kaeng Ruang’ is a village in Ubon Ratchathani province in the northeastern part of Thailand. It was selected as a case study because the village was relatively poor and income of the villagers was mainly from agricultural production. Additionally it was also selected because the village had potentials for developing tourism activities to generate supplementary income for the villagers. A research team which consisted of four Czech students and one Thai professor went to the selected village and stayed with local

families for four weeks to collect data and to a develop tourism micro cluster model.

Data were collected through qualitative and quantitative methods. Qualitative methods included participatory observation and unstructured in-depth interview which were arranged through the village head, other leaders, and the people of village to gain a unique insight about the village’s problems and potentials (e.g. opportunities, needs, motivations and readiness of villagers, etc) . Quantitative method of data collection was conducted through secondary data including the annual Thai rural village report and basic needs report of the village to obtain data concerning background information and fundamental physical and social tourism-related resources of the village. All data were analyzed in the light of RBV using a SWOT analysis framework to identify the village’s key resources and capabilities and the possible businesses/activities related to tourism in order to develop a micro cluster model for planning the village’s tourism development.

The results.

Geography and location of the village. The Ban Kaeng Ruang village is situated in the Na Chaluai district, Ubon Ratchathani province in North-Eastern region of Thailand and approximately 630km away from the Bangkok, the capital city of Thailand. The village is located only eight kilometers from Phu Chong Na Yoi National Park which has one of the most beautiful

waterfalls in northeastern part of Thailand is close to the triangle of borders between Thailand, Laos and Cambodia.

The village is easily accessible as it can be directly reached by bus from Bangkok and is located only a few minutes on foot from the bus stop to the village.

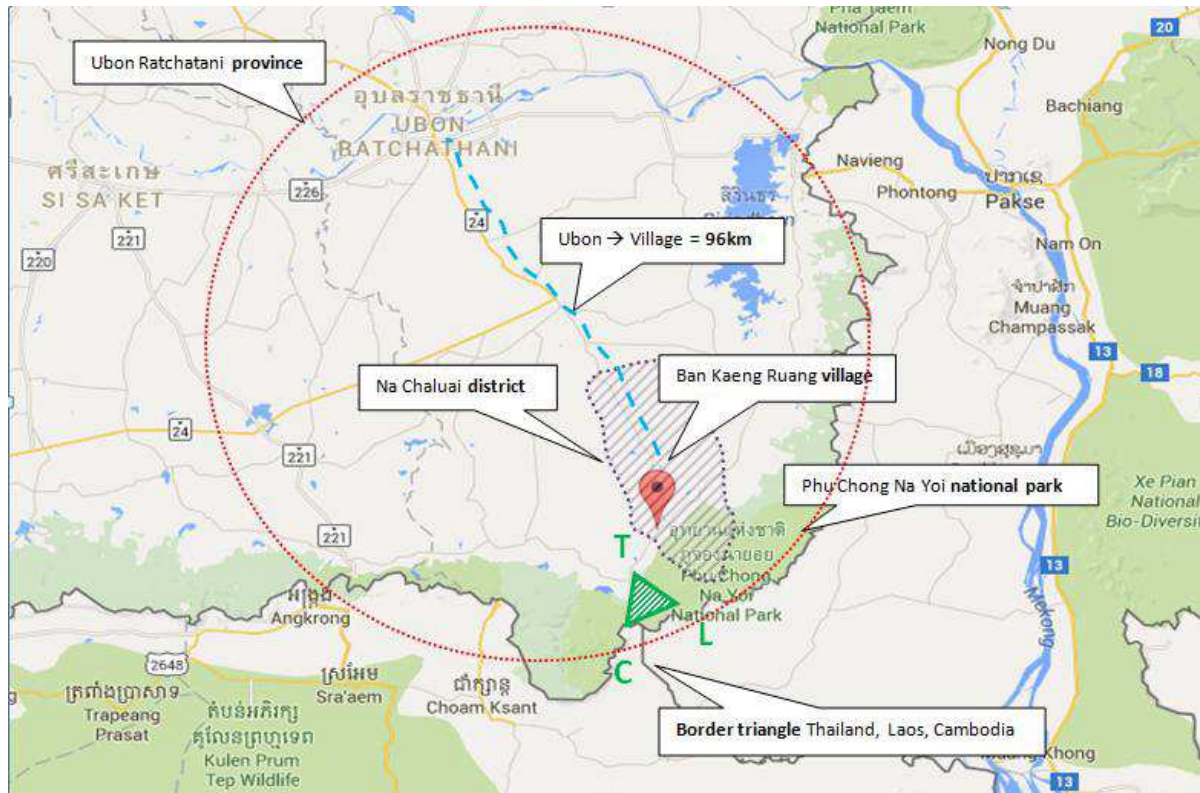


Fig. 2. Location of the studied village

The village, with the area of 15.62 Km², has 162 households and 543 inhabitants. More than 90 percent of population are working in agricultural farms cultivating mainly rice and tapioca. Many of the villagers are relatively poor due to several factors, E.g lack of an irrigation system, unstable price of agricultural products, low productivity, and so on. These factors lead to debt levels rising in the past years and remaining high. The village has social institutions including 1 temple, 1 school, 1 children, 1 healthcare center.

Resources of the studied village related to tourism development

The results from mixed method study showed that the village has sufficient resources both tangible and intangible for tourism development.

Tangible resources

1) Village fund:

The fund was established by the Thai government to financially support villages throughout the whole country. The village funds are sources of working capital for investment in career development, job creation, income generation and relief of urgent needs of the communities to stimulate grassroots economies. Also, the funds are aim to strengthen the economic and social resilience of people throughout the country which will create positive impact on villages in terms of adaptability to social, economic, political and cultural change. Villagers can get loans from the fund through the village committee.

2) Natural resources nearby the village

1. National Park
2. Huai Luang Waterfall

A large waterfall Caused by the flow of the Royal Creek With a height of about 45 meters, flowing through the cliff into the bottom which looks like a large pool with clean white sand. The water is clean emerald green, suitable for swimming. In addition, there are many yellow tail fishes that can facilitate foot spa's for visiting bathers.

3. Kaeng Kalao (Kalao rapid)

This is a large- rapids meandering around bouldes in the middle of Huai Luang stream which is shady with many kinds of plants. There are many butterflies in the rapids area. Along the edge of the rapids, in the rainy season, tourists can enjoy swimming.

4. Phalan Pa Chad

A large palette enriched with large, small chad trees. There is also a variety of grass fields suitable for exploring the beautiful grass during the late rainy season (October - November).

3) Houses with unused space and local tractors

4) Local fruits and vegetables including malva nut, pumpkin, banana, coconut, bamboo shoots etc.

Intangible resources

1) Strong leadership of formal and informal leaders

2) Social and vocation groups. The villages' social capital is contained mainly within 1 women group, 1 processing group, and 1 bamboo processing group.

3) Human resources. The village has enough labour to for business expansion within the cluster.

4) Identity of the community. The village have a mixed lifestyle. There are many tribes living together, including Thai, Lao, Khmer and Suay.

5) Cohesion and cooperation of villagers.

SWOT Analysis for Tourism Development.

SWOT analysis is a kind of analysis that considers the congruence of internal and external conditions. The analysis was made based on data collected. The analysis indicated that the village has several strengths and opportunities which can be utilized as a potential for tourism development in the community.

Components of SWOT analysis are showed as followed:

Strengths

1) Natural resources. There are beautiful national park and tourist attractions e.g. water fall, rapid, palette, etc. near by the village.

2) Strong leadership. The head of the village and informal leaders are interested in and willing to new development projects.

3) Local enthusiasm to participate in new businesses or income generating activities. Strong vocational groups

4) Human resources available for business activities

5) Good location. The village is situated close to bus stop and national park and attractions

6) Village fund. The village has the fund which is able to support the start-up and viable businesses

7) Local resources. The village has rare fruit - Malva nut and other local vegetables.

Weakness

1) Lack of business knowledge and skills.

2) Lack of technical knowledge related to tourism activities.

Opportunities

1) Increasing demand for authentic and rural tourism.

2) Domestic tourism promoted by the Thai government.

3) The village can be easily accessible as the village is located very close to the main road and the bus stop of Bangkok bus. In addition, the road is linked to the center of Ubon Ratchathani and other provinces.

4) Strong support from the national park in any tourism activities done by the studied village.

Threats

1) Collaboration and support from concerning government agencies are complicated.

2) Competition from other tourist destinations nearby.

Tourism micro cluster development in the village

Based on tourism related resources and SWOT analysis, the micro cluster model in tourism at Kaeng Ruang village was developed to plan development through tourism. The cluster was consisted of 4 tourism related businesses/activities which are connected and complement one another. These 4 businesses/ activities include home stay, marked trekking, adventure tours, and processed malva nut as shown in the figure 3. The development of these businesses was undertaken based on the needs of the community members and also resources available in the village. The businesses will be operated and managed by the community with assistance by local government and concerned organizations.



Fig. 3. Tourism micro cluster model for the selected village

The 4 main businesses/income generating activities incorporated into tourism micro cluster at Baan Kaeng Ruang are described as followed:

1) Homestay

In Thailand there are a growing number of individual travelers trying to discover and experience the country's unique treasures. Homestay is helping these travelers access these places and be close to local

population. Explanation of it guarantees better coexistence during common time in village.

The aim of Homestay service is to serve tourists who visit the village and nearby national park. The village is merely self-sufficient. Most people here are living in poor conditions. The first idea was to create the village as a tourist destination. In connection with tourism, therefore, it is necessary to provide alternatives to Hotel accommodation which is missing in the village. Some people in the village live in houses that have unused rooms and spaces, thus implementation of Homestay can be solution to accommodate tourists who come to visit the village and seek experiences of local life and culture. Homestay can provide a good opportunity for tourists to learn and experience the villagers' way of life, their customs, and daily chores, and try the local cuisine. In the meantime, the homestay family can gain supplementary income from visitors. There are initially around 10 households which are ready to participate in the homestay activity at the early phase of the project.

To operate this business, a homestay group will be established. There will be 10 members, who all are house owners. Members of the home stay group will be trained to have knowledge of homestay standards and sufficient skills to run the business. The business plan including operation, financial, marketing, and risk management has been prepared by the research team to support the group in managing this business.

2) Marked Trekking

The marked trekking project is set up to take advantage of potential and current trend towards an increase in the number of tourists visiting national parks. There is a high opportunity for developing a trekking marked system in Phu Chong Na Yoi National Park and to prepare the National Park for a future demand within this market. The point is to take an advantage of the growth of demand of trekking, natural resources, and establish a new marked system for comfortable and easy travelling and trekking. The service of trekking system will set up and provide comfortable and easy way for visitors.

Phu Chong Na Yoi National Park is located eight kilometres away from a village and it is the main attraction for tourists. The National Park has one of the most beautiful water fall in Thailand and it is also rich and full of natural resources e.g. mountains, water fall, rapid, creek etc. General forest conditions are dry evergreen forest, mixed deciduous forest. There is a diverse species of plants in the area. Resident fauna includes elephants, tigers, Malayan sun bears, barking deer, gibbons, black hornbills and endangered white-winged ducks, which have thus far largely gone unnoticed by visitors. (LonelyPlanet.com; Introducing Phu Chong Nayoi National Park). The idea is to provide tourists with the opportunity to visit the National Park and focus on experiencing authentic activities in the village and the National Park. An attractive trekking journey tries to satisfy visitor needs to build new relationship with nature and new culture. The target customers are mainly backpackers and visitors who are interested in seeking new type of self-discovering the

beauty of Thai nature right in the middle of the National Park.

Creation of easy trekking marked journey has huge advantages for visitors as they can be independent in the area of National Park. It is also important to get local people involved in the creation of marking a systematic journey and build a trekking journey for tourists (that are host in a local village or backpackers that visit for one day). The system and colours of marked journeys will be overseen by forest rangers and they will together implement the marks. Members will prepare a journey which will go around the main attraction in the National Park and colour particular trees for a trekking journey. The implementation of the marked system will be realized by 5 rangers, who will take care of the implementation of colouring marked indicators on a trees trough a trekking journey which is designed by them.

The trekking journey is around 6 km long where tourists will spend time in the National Park for a half of a day. After tourists arrive the village, they will be transferred to the National Park, which is around 5 km away from the village, by local people or hosts unless they wish to travel independently. Once they arrive in the National Park, they can buy a ticket for the National Park where forest rangers will introduce a trekking journey which will be available for individuals and also groups of people. Assistants also have to give an instruction about safety. The journey starts on a white/yellow/white colour and goes all the way around a trekking journey. Customers starts at the Start Point (the arrival centre) and they go 3.26 km to the main waterfall. During the first part of the journey they can see many interesting places and experience natural beauty. The forest has many interesting flowers to see (the Natural Trail), trees which change their leaves or tourist can stop at the Kaeng Kaloew (Kaloew rapid) and enjoy a view on butterflies which are flying around. Journey also goes through a tropical forest and enjoy the beauty of the surrounding green paradise. The white/yellow/white marked will be set all around the journey and it will be visible on the way according to rules of touristic marked system in the EU (if a tourist stops at a marked point with a mark he/she has to see from the point they stay another one). After the first part of the journey tourist will stop at the Visitor Centre - Waterfall. This is the main attraction in the Park and here they can enjoy and relax while they sit next to the beautiful waterfall. Marked system will continue with while/yellow/white coloured markings from the visitors centre another 2.90 km back to the start. During this part of the journey tourists will continue walking in a beautiful nature and discovering quiet and peaceful spirit of the National Park and experience with the Praown Raor Waterfall.

This activity will operate through the cooperation between the national park and the community. Therefore, the activity will benefit the villagers because it will complement the homestay business and malva nut processed business. The activity will attract tourists who, consequently, will be accommodated at home stay in the village allowing the sale of malva nut products to tourists after their trip at the national park. Additionally, the local people can gain more income from transfer

services from the village to the national park to tourists who want to experience a marked trekking journey.

3) Adventure Track

This business project is about to provide tourists an adventure tour on local farm tractor into the edge of the national park. The business idea was created on the basis that the rural areas can provide tourists with local authenticity. Also, visiting rural areas and spent some money in small attractions or eating local food can improve the economic situation of local people and contribute to eradication of poverty. In addition, there is recently a trend for tourists to search for adventurous types of holiday and want to experience a real 'taste' of the country and enjoy the real spirit inside the authentic atmosphere with local people. This opportunity is more and more influencing the rural areas of Thailand. These types of tourists encourage rural areas to be more creative and provide visitors experiences that they want.

The project is proposed due to availability of beautiful nature in the area connecting the national park, underutilization of agriculture tractors of some villagers, the willingness of people to manage tasks related to this activity. The adventure tour service is named "the adventure track" in the project. The length of total trip is 15 Km. (including 5 Km. track length) and trip will last about 4,5 hours. Each tractor can accommodate a maximum 6 tourists. The fee charged is 300 Thai Baht each. The tour will start in the morning. The tourists will be picked up in the village by the tractor or by mini truck and will be taken to the forest on the adventure track. In the course of the adventure track they will have four stops during which they can experience nature and see various interesting things e.g. a cave or small temple. The last stop will include lunch at a local reservoir served with local food in the bamboo containers.

The project expects 6 operating farm tractors to participate in this activity. At least 20 people will be part-time employed (drivers, assistants, and cooks). The business will positively affect the people who are involved in form of supplementary income. In addition, the activity will support and complement the home stay and malva nut businesses in the way that these will draw interest from tourists who will stay in the village with home stay families and buy malva nut products at the end of the trip. To secure this business, a group of tractors owners will be formed and self-managed. Members of the group will attend a short training course to gain knowledge and skill of operation and safety standard. The business plan including operation, financial, marketing, and risk management has been prepared to support the group in managing the business.

4) Malva Nut Processed Products

This business is developed to enable the village's women group to process malva nut which is very nutritious food. The malva nut is local crop is cultivated in the village and surrounding areas. It's low in calories but high in natural fibre and attractive for health-conscious people, especially those with weight control problems. The malva nut is very healthy and nutritious and is cultivated for its healing and illness preventive properties because malva nut is rich in vitamins and minerals, e.g. Calcium, Iron, Sodium, Iodine, Vitamin B1 and Vitamin B2. Malva nut gives relief from

insomnia, prevents bacterial infections, improves digestive health, gives relief from pain and headache etc.

Previously the women group used to make and sell juice from this malva nut but this didn't have enough demand. This business project, therefore, created two new products – malva nut jelly and pumpkin soup with malva nut. This offers the prospect of adding value in and subsequently can generate extra income to the women's group. This could bring income for local people, create new job opportunities and create something new, sustainable and interesting.

The first idea is to make a jelly because is very easy to make, store and sell and the main ingredient is abundantly available locally. The second idea is to make pumpkin soup because there are a lot of pumpkins and this is very delicious way to include malva nut into a diet. The products will be sold on the local markets, in the national park and kiosks. The jelly and pumpkin soup will be served to tourists in the nearby national park and during their home stay in the village. The operation of this business will be coordinated by the village's women group which has 12 members. The group has already facilities and equipment for production. The fund for the project will mainly be from the village fund. A training course on how to process the malva nut fruit will be provided. A Business plan as a guideline on running business has been prepared by the research team.

In conclusion, all four tourism related businesses are interconnected according the concept of diagonal clustering, which identifies the concentration of complementary businesses. Each business adds complementary value to the products or services produced by other business. This clustering contributes to building a sustainable tourist destination in the village. These complementary activities will be designed to generate economies of scope, encourage employment opportunities and alleviate poverty.

Conclusion. The study explored the possible micro cluster model to plan development of a tourist destination in a poor rural village in Thailand context. The study also addressed the theoretical foundation of a tourism micro cluster model for a rural village in Thailand that applies concepts derived from a board literature review.

In light of our analysis, it is evident that tourism clustering is feasible in the context of this locality. The studied village has sufficient resources both tangible and intangible resources possible for planned tourism micro cluster development. However, an attempt at cluster development in the studied village would require an intervention to provide technical assistance from concerned parties e.g. local government in the early stage to build capacity building of local people for running businesses independently and sustainably.

Although one of the limitations of this study is to focus on only one village, the case study of Kaeng Ruang village can provide contextual insight and meaningful implications for policymakers when considering clustering as a planned destination development strategy. However, further research should be conducted to explore the potentials of tourism cluster model for planned rural development in the other villages.

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Надійшла до редколегії 15.02.2019 р.

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УДК 911.3:339.56 (477)

DOI: 10.26565/2076-1333-2019-26-06

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**ТРАНСФОРМАЦІЇ ЗОВНІШНЬОЇ ТОРГІВЛІ ТОВАРАМИ УКРАЇНИ:
РЕАЛІЇ, ПРОБЛЕМИ, ПЕРСПЕКТИВИ**

У статті проведено аналіз трансформацій зовнішньої торгівлі товарами України у 2000-2017 рр. Вибір періоду дослідження зумовлений тим, що з 2000 р. почалося «оздоровлення» і поступове зростання економіки України після тривалої кризи 1990-х рр. Протягом 2000-2017 рр. Україна мала переважно від'ємний зовнішньоторговельний баланс (окрім 2000-2004 та 2015 рр.); в цілому збалансовану зовнішню торгівлю; небезпечну імпорتنу залежність; надзвичайно відкриту економіку; високий рівень експорту. Обсяги експорту, імпорту і зовнішньоторговельного обороту мали нестабільну динаміку з негативними тенденціями в 2008-2009 та 2013-2015 рр.

У структурі експорту товарів у 2017 р. переважали недорогочінні метали та вироби з них; продукти рослинного походження; жири та олії тваринного або рослинного походження; а в структурі імпорту – мінеральні продукти; машини, обладнання та механізми, електротехнічне обладнання; продукція хімічної та пов'язаних з нею галузей промисловості. Протягом 2001-2017 рр. відбувалося в експорті – збільшення частки продукції галузей первинного сектору (за рахунок рослинництва) та зменшення продукції вторинного сектору (за рахунок металургії, машинобудування, хімічної та текстильної промисловості); в імпорті – зменшення частки сировини та збільшення частки інших категорій товарів. Товарна структура зовнішньої торгівлі стала більш пропорційною, без сильно домінуючого товару.

Головними партнерами в експорті товарів у 2017 р. були Російська Федерація, Польща, Туреччина, Італія, Індія, а в імпорті – Російська Федерація, Китай, Німеччина, Польща, Білорусь. Протягом 2001-2017 рр. головними партнерами України залишалися в експорті – Російська Федерація, Польща, Туреччина, Італія, Китай, Німеччина; в імпорті – Російська Федерація, Німеччина, Польща, Білорусь, США, Італія. Незважаючи на різке скорочення торговельних зв'язків з Російською Федерацією, вона все ще залишається найбільшим партнером у зовнішній торгівлі товарами України. Серед регіонів світу найбільшим торговельним партнером України в останні роки стає Європа при відповідному скороченні частки країн СНД.

Для збалансування зовнішньої торгівлі товарами України необхідно вжити комплекс заходів, спрямованих на підвищення ефективності експортної діяльності та імпортозаміщення у певних секторах економіки.

Ключові слова: зовнішньоекономічні зв'язки, зовнішня торгівля товарами, зовнішньоторговельна політика, товарна структура зовнішньої торгівлі, географічна структура зовнішньої торгівлі товарами, трансформації зовнішньої торгівлі товарами, оптимізація імпорту, експортний потенціал.

Наталія Гусєва, Юрій Кандиба, Павел Кобылин. ТРАНСФОРМАЦИИ ВНЕШНЕЙ ТОРГОВЛИ ТОВАРАМИ УКРАИНЫ: РЕАЛИИ, ПРОБЛЕМЫ, ПЕРСПЕКТИВЫ

В статье проведен анализ трансформаций внешней торговли товарами Украины в 2000-2017 гг. Выбор периода исследования обусловлен тем, что с 2000 г. началось «оздоровление» и постепенный рост экономики Украины после длительного кризиса 1990-х гг. В течение 2000-2017 гг. Украина имела преимущественно отрицательный внешнеторговый баланс (кроме 2000-2004 и 2015 гг.), в целом сбалансированную внешнюю торговлю; высокие импортную зависимость, открытость экономики и уровень экспорта. Объемы экспорта, импорта и внешнеторгового оборота имели нестабильную динамику с негативными тенденциями в 2008-2009 и 2013-2015 гг.

В структуре экспорта товаров в 2017 г. преобладали недорогочинные металлы и изделия из них; продукты растительного происхождения; жиры и масла животного или растительного происхождения; а в структуре импорта – минеральные продукты; машины, оборудование и механизмы, электротехническое оборудование; продукция химической и связанных с ней отраслей промышленности. В течение 2001-2017 гг. было характерно для экспорта – увеличение доли продукции отраслей первичного сектора (за счет растениеводства) и уменьшение продукции вторичного сектора (за счет металлургии, машиностроения, химической и текстильной промышленности); для импорта – уменьшение доли сырья и увеличение доли других категорий товаров. Товарная структура внешней торговли стала более пропорциональной, без сильно доминирующего товара.

Главними партнерами в експорті товарів в 2017 г. були Російська Федерація, Польща, Турція, Італія, Індія, а в імпорте – Російська Федерація, Китай, Німеччина, Польща, Білорусь. В течение 2001-2017 гг. главными партнерами Украины оставались в экспорте – Российская Федерация, Польша, Турция, Италия, Китай, Германия; в импорте – Российская Федерация, Германия, Польша, Беларусь, США, Италия. Несмотря на резкое сокращение торговых связей с Российской Федерацией, она все еще остается крупнейшим партнером во внешней торговле товарами Украины. Среди регионов мира крупнейшим торговым партнером Украины в последние годы становится Европа при соответствующем сокращении доли стран СНГ.

Для сбалансування зовнішньої торгівлі товарами України необхідно прийняти комплекс заходів, направлених на підвищення ефективності експортної діяльності та імпортозаміщення в певних секторах економіки.

Ключевые слова: внешнеэкономические связи, внешняя торговля товарами, внешнеторговая политика, товарная структура внешней торговли, географическая структура внешней торговли товарами, трансформации внешней торговли товарами, оптимизация импорта, экспортный потенциал.

Nataliia Husieva, Yurii Kandyba, Pavlo Kobylin. TRANSFORMATION OF FOREIGN COMMERCE OF UKRAINE: REALITIES, PROBLEMS, PERSPECTIVES

The paper analyzes transformations of foreign trade in goods of Ukraine in 2000-2017. The choice of the study period is due to the fact that the "recovery" and the gradual growth of the Ukrainian economy after the long crisis of the 1990s has begun since 2000. Ukraine had a mostly negative foreign commercial balance (except for 2000-2004 and 2015); generally balanced foreign trade; dangerous import dependency ratio; extremely economy openness index; the high exports ratio in 2000-2017. The volumes of export, imports and foreign commercial turnover had unstable dynamics with negative trends in 2008-2009 and 2013-2015.

Base metals and their ware; plant products; animal or plant fats and oils were prevailed in the export component of the foreign commerce; mineral products; machines, equipment and mechanisms, electric and technical equipment; products of chemical and derivative industries were dominant in the structure of import in 2017. The export was characterized by increase in the share of products of the primary sector (due to crop production) and decrease in the secondary sector (due to metallurgy, machine building, chemical and textile industry) during 2001-2017. The import was characterized by decrease in the share of raw materials and increase in the share of all other goods during the mentioned period. Commodity structure of foreign trade became more proportional, without a highly dominant product.

The Russian Federation, Poland, Turkey, Italy, India were the key partners in the export of goods, while those ones in the import were the Russian Federation, China, Germany, Poland, Belarus. The key partners remained during 2001-2017 (the Russian Federation, Poland, Turkey, Italy, China, Germany were key partner in export; In the import - the Russian Federation, Germany, Poland, Belarus, the USA, Italy were key partner in import. Despite the drastic decrease in trade relations with the Russian Federation, it remains the largest partner in the Ukrainian foreign commerce. Among the regions of the world, the largest trading partner of Ukraine in recent years is Europe with relevant reduction of CIS countries in the common share.

It is necessary to provide a set of measures aimed at increasing the efficiency of export activity and import substitution in the certain sectors of the economy to balance foreign commerce of Ukraine.

Keywords: foreign economic relations, foreign commerce, foreign trade policy, commodity pattern of foreign commerce, geographical allocation of foreign commerce, foreign commerce transformation, optimization of import, increase of export potential.

Постановка проблеми. Зовнішньоторговельні зв'язки є важливим індикатором економічного розвитку країни. В умовах глобалізації значення зовнішньої торгівлі суттєво зростає, оскільки національні економіки стають все більш відкритими і вразливими до впливів зовнішнього середовища. Розвитку міжнародної торгівлі сприяє діяльність СОТ, інтеграційні процеси в окремих регіонах світу.

Зовнішньоторговельні зв'язки є особливо актуальними для країн з перехідною економікою. Ці країни активно переживають структурну перебудову економічної системи, що безпосередньо відображається і на структурі зовнішньої торгівлі. Україна, визначивши пріоритети європейської інтеграції, переживає глибокі зміни в економічному розвитку. Це стосується і зовнішньої торгівлі. Економіка України пройшла процес трансформації від планової командно-адміністративної до ринкової, переживала періоди зростання і спаду, а нині змінює вектор розвитку від Російської Федерації і країн СНД до Європейського Союзу. Всі перелічені процеси проектується на зовнішньоторговельні зв'язки, виступаючи чинниками їх динаміки, трансформації товарної і географічної структури. Отже, дослідження зовнішньоторговельних зв'язків України є важливою темою для науковців.

Метою даного дослідження є аналіз трансформації зовнішньої торгівлі товарами України у кон-

тексті особливостей її соціально-економічного розвитку.

Часові рамки дослідження охоплюють період з 2000 до 2017 рр. Вибір такого часового інтервалу зумовлений тим, що з 2000 р. почалося «оздоровлення» і поступове зростання економіки України після тривалої кризи 1990-х рр. Протягом ХХ ст. економіка України переживала період зростання (2000-2007 рр.), період спаду, викликаного світовою економічною кризою 2008-2009 рр., період післякризового відновлення 2010-2013 рр., період затяжної кризи (2014 р. – по цей час), зумовленої переорієнтацією від головного торговельно-економічного партнера – Російської Федерації – до країн ЄС.

Аналіз основних тенденцій у міжнародній торгівлі. Негативні тенденції зовнішньої торгівлі України в 2008-2009 та 2013-2017 рр. (зменшення обсягів експорту, від'ємне сальдо торгівлі, висока імпортна залежність тощо), вимагають від держави певних заходів, спрямованих на нарощування експортного потенціалу та оптимізацію імпорту. Вагомим підґрунтям для цього може стати вивчення міжнародного досвіду впровадження зовнішньоторговельної політики.

Зовнішньоторговельна політика держав поділяється на політику вільної торгівлі (фрітеріанство) та протекціонізму (табл. 1).

Таблиця 1

Політика вільної торгівлі та протекціонізму: визначення та сутність
(складено авторами)

Автор, джерело	Політика вільної торгівлі (фрітре- ріанство)	Політика протекціонізму
Словник сучасної економічної теорії Макміллана (2003) [24]	політика невтручання держави в міжнародну торгівлю, при якій торгівля здійснюється відповідно до міжнародного поділу праці і теорії порівняльних переваг. Така політика веде до найбільш ефективного розподілу ресурсів у світовому масштабі і максимізації світового доходу	економічна політика держави, спрямована на захист національної економіки від іноземної конкуренції; реалізується за допомогою фінансового заохочення вітчизняної промисловості, стимулювання експорту, обмеження імпорту
Великий економічний словник (2002) [2]	державна утримується від безпосереднього впливу на зовнішню торгівлю, залишаючи ринок основним регулятором. При цьому держава взагалі усувається від впливу на зовнішню торгівлю – вона укладає договори з іншими країнами про надання максимальної свободи своїм господарюючим суб'єктам	заходи із захисту внутрішньої економіки за допомогою тарифів, квот та інших обмежень
А. Данильцев (2004) [5]	спрямована на створення умов, що сприяють розвитку міжнародного обміну товарами, послугами і факторами виробництва, і проводиться як частина заходів з розширення доступу вітчизняних товарів на зарубіжні ринки в рамках багатосторонніх або двосторонніх зусиль щодо лібералізації міжнародної торгівлі	виключається вільна дія ринкових сил. Обмеження називаються торговими бар'єрами, спрямованими на штучне створення більш сприятливих умов для вітчизняних підприємств ціною деякого зниження зовнішньоторговельного обороту і відмови від частини вигод, пов'язаних з розвитком міжнародних економічних відносин

Ж. Ваена Rojas, Ж. Сано (2018 р.) підіймають питання, чому країни приймають тарифні та нетарифні бар'єри, щоб забезпечити їх експорт [29]. За Ф. Пієрола (2007 р.), з моменту створення Генеральної угоди з тарифів і торгівлі (ГАТТ) у 1947 р. було проведено вісім раундів переговорів протягом майже п'яти десятиліть щодо заходів з обмеження експорту аж до створення СОТ у 1995 р. У цих переговорах розглядалися теми, пов'язані з роллю тарифних і нетарифних бар'єрів, правил, питань інтелектуальної власності, врегулювання спорів тощо [28, 32].

Згідно S. Mildner і G. Lauster (2011 р.), обмеження на експорт були введені з різних причин, які відповідають політичним цілям, зокрема національній безпеці і захисту навколишнього середовища, соціальним цілям, а також економічним цілям, таким як збільшення державних доходів, сприяння розвитку галузей промисловості, диверсифікація експорту і контроль коливань цін [31].

Тарифні бар'єри впроваджуються у вигляді заходів з удосконалення умов торгівлі, продовольчої безпеки та стабілізації кінцевої ціни споживання, стабілізації проміжної ціни споживання і розвитку переробної промисловості, зростання державних до-

ходів, перерозподілу доходів, стабілізації прибутку з експорту. Нетарифні бар'єри впроваджуються у вигляді заходів із захисту та просування продукції галузей первинної обробки сировини та дешевих предметів споживання, просування соціальної політики, екологічного захисту та збереження природних ресурсів, контролю над інфляцією, протидії росту тарифів тощо [29].

Співвідношення свободи торгівлі і протекціонізму залежить від ряду факторів. Одним з них є розміри національної економіки. Мінімальний рівень торгових бар'єрів характерний для малих розвинутих економік. Бельгія, Нідерланди і Люксембург створили перший у післявоєнній Європі митний союз, а потім увійшли до числа членів – засновників ЄС. Навпаки, у великих державах з містким внутрішнім ринком існує більш високий рівень тарифного захисту. У США історично існував досить високий митний тариф, який поступово знижувався відповідно до домовленостей, досягнутих у рамках ГАТТ [4].

Методика дослідження. Для виявлення структурно-динамічних особливостей зовнішньої торгівлі товарами України в 2013-2017 рр. було проаналізовано ряд показників (табл. 2).

Таблиця 2

Показники розширеної торгівлі (складено за [3, 21, 26, 30])

Показник	Формула	Примітка
Обсяг експорту $V_{\text{екс}}$		
Обсяг імпорту $V_{\text{имп}}$		
Зовнішньоторговельний оборот $V_{\text{зтв}}$ – сума вартісних обсягів експорту та імпорту суб'єктів зовнішньої торгівлі за певний проміжок часу	$V_{\text{зтв}} = V_{\text{екс}} + V_{\text{имп}}$	
Сальдо зовнішньоторговельного балансу S – різниця між вартістю експорту та імпорту	$S = V_{\text{екс}} - V_{\text{имп}}$	При позитивному сальдо зовнішньоторговельний баланс є активним, при негативному – пасивним
Рівень імпорту (коефіцієнт імпоротної залежності) $K_{\text{зв.з.екс}}$ – відношення обсягу імпорту до ВВП, виражене у відсотках	$K_{\text{зв.з.екс}} = \frac{V_{\text{имп}}}{\text{ВВП}} * 100\%$	Характеризує імпортозалежність національної економіки від світового господарства. Масштаб імпорту вважається безпечним, якщо показник імпоротної залежності менше або дорівнює 15 %
Коефіцієнт покриття експорту імпортом $K_{\text{пок.екс}}$ (або індекс ступаю балансу) – відношення доходів від експорту до витрат на імпорту	$K_{\text{пок.екс}} = \frac{V_{\text{екс}}}{V_{\text{имп}}}$	Розглядається як міра збалансованості зовнішньої торгівлі. При активному сальдо зовнішньоторговельного балансу значення коефіцієнта покриття експорту імпортом більше одиниці, при пасивному – менше одиниці. Результат різниці одиниці і коефіцієнта покриття експорту імпортом характеризує масштаб дефіциту (профіциту) зовнішньоторговельного балансу
Коефіцієнт відкритості національної економіки $K_{\text{зв.з.екс}}$ – відношення обсягу експорту та імпорту до ВВП, виражене у відсотках	$K_{\text{зв.з.екс}} = \frac{V_{\text{екс}} + V_{\text{имп}}}{\text{ВВП}} * 100\%$	Показує ступінь участі країни в міжнародному поділі праці
Рівень експорту $K_{\text{екс}}$ – відношення обсягу експорту до ВВП, виражене у відсотках	$K_{\text{екс}} = \frac{V_{\text{екс}}}{\text{ВВП}} * 100\%$	Залежить від здатності країни конкурувати на світовому ринку і від потреби країни в імпорті, тому доходи від експорту повинні перекривати витрати на імпорту
Коефіцієнт збалансованості зовнішньої торгівлі $K_{\text{зб.з.екс}}$	$K_{\text{зб.з.екс}} = 1 - \frac{2V_{\text{имп}}}{V_{\text{екс}} + V_{\text{имп}}}$	При збалансуванні обсягів експорту та імпорту коефіцієнт збалансування зовнішньоторговельної діяльності стає близьким до нуля. За наявності однобічності відносин, тобто коли значно розрізняються обсяги експорту та імпорту, значення коефіцієнта залежно від знаку зовнішньоторговельного сальдо наближається до «+1» або «-1». Значення коефіцієнта на рівні «+1» або «-1» свідчить про повну однобічність зовнішньоторговельних зв'язків, тобто ці зв'язки представлені або тільки експортними або тільки імпортними поставками. При значенні $K_{\text{зб.з.екс}}$, що дорівнює 0, їх слід вважати повністю збалансованими.

Економічна інтерпретація зовнішньої торгівлі	
Значення коефіцієнта	Характеристика
-1	абсолютна незбалансованість імпорту
1	абсолютна незбалансованість експорту
від -1 до -0,5	значна незбалансованість імпорту
від -0,5 до 0	порівняна збалансованість імпорту
0	абсолютна збалансованість експорту й імпорту
від 0 до 0,5	порівняна збалансованість експорту
від 0,5 до 1	значна незбалансованість експорту

Експортний потенціал держави (показник інтенсивності експорту) $K_{\text{експ. потенц}}$	$K_{\text{експ. потенц}} = \frac{V_{\text{екс}}}{N_{\text{сер.}}}$ де $N_{\text{сер.}}$ – середньорічна чисельність населення країни
Показник інтенсивності імпорту $K_{\text{інтенс. імп.}}$	$K_{\text{інтенс. імп.}} = \frac{V_{\text{імп.}}}{N_{\text{сер.}}}$
Показник інтенсивності зовнішньоторговельного обороту $K_{\text{інтенс. зто}}$	$K_{\text{інтенс. зто}} = \frac{V_{\text{зто}}}{N_{\text{сер.}}}$

Виклад матеріалів дослідження

Основні показники розвитку зовнішньої торгівлі товарами України (табл. 3) дозволяють зробити такі висновки, що в 2017 р.:

1) Україна мала від'ємний зовнішньоторговельний баланс (як і протягом попередніх 10 років, окрім 2015 р.), який дорівнював -6342,5 млн. дол. США;

2) зовнішня торгівля України була порівняно збалансованою (коефіцієнт збалансованості дорівнював -0,07, тобто з незначним переважанням імпорту);

3) для України характерна висока імпортна залежність (коефіцієнт імпоротної залежності дорівнював 44,2 %, тобто вище 15 %, що говорить про небезпечний масштаб імпорту, який загрожує національній безпеці країни);

4) на кожного українця припадало 1018,0 дол. США експорту, 1167,2 дол. США грн. імпорту або

2185,2 дол. США зовнішньоторговельного обороту;

5) економіка України відрізнялася дуже високою відкритістю (коефіцієнт відкритості економіки дорівнював 82,8 %, тобто на сумарну частку експорту та імпорту припадає понад 4/5 ВВП країни, що свідчить про високий вплив кон'юнктури світового ринку на економічні процеси в державі);

6) для України характерний високий рівень експорту (38,6 %), у той час як він вважається нормальним, якщо не перевищує 10 %. Взагалі, високий рівень експорту – показник високої насиченості економіки високоякісною продукцією, конкурентоспроможності вітчизняних товарів на світовому ринку [22]. Проте в Україні високий рівень експорту забезпечується експортом продукції сировинних галузей, що характеризує низьку конкурентну спроможність у наукоємних галузях. Часто такий експорт вимушений.

Таблиця 3

Основні показники розвитку зовнішньої торгівлі товарами України в 2000-2017 рр.
(обраховано і складено за [6-19])

Показник	2000	2005	2007	2009	2011	2013	2015*	2017*
Експорт товарів, млн. дол. США	14572,5	34228,4	49296,1	39695,7	68394,2	63320,7	38127,1	43264,7
Імпорт товарів, млн. дол. США	13956	36136,3	60618	45433,1	82608,2	76986,8	37516,4	49607,2
Сальдо зовнішньоторговельного балансу, млн. дол. США	616,5	-1907,9	-11321,9	-5737,4	-14214	-13666,1	610,7	-6342,5
Зовнішньоторговельний оборот, млн. дол. США	28528,5	70364,7	109914,1	85128,8	151002,4	140307,5	75643,5	92871,9
Коефіцієнт імпоротної залежності, %	44,64	41,95	42,47	38,76	48,78	40,41	41,21	44,22
Коефіцієнт покриття імпорту експортом (індекс стану балансу)	1,04	0,95	0,81	0,87	0,83	0,82	1,02	0,87
Коефіцієнт відкритості економіки, %	91,26	81,68	77,01	72,62	89,17	73,65	83,10	82,78
Рівень експорту, %	46,61	39,73	34,54	33,86	40,39	33,24	41,88	38,56
Коефіцієнт збалансованості зовнішньої торгівлі товарами	0,02	-0,03	-0,10	-0,07	-0,09	-0,10	0,01	-0,07
Експортний потенціал (показник інтенсивності експорту), дол. США на 1 особу	296,5	726,7	1060,1	862,0	1496,6	1391,7	889,8	1018,0
Показник інтенсивності імпорту, дол. США на 1 особу	283,9	767,2	1303,6	986,6	1807,6	1692,0	875,5	1167,2
Показник інтенсивності зовнішньоторговельного обороту, дол. США на 1 особу	580,4	1493,9	2363,7	1848,6	3304,2	3083,7	1765,3	2185,2

*В 2015 р. – без урахування тимчасово окупованої території АР Крим, м. Севастополя та частини зони проведення антитерористичної операції; в 2017 р. – без урахування тимчасово окупованої території АР Крим, м. Севастополя та частини тимчасово окупованих територій у Донецькій та Луганській областях

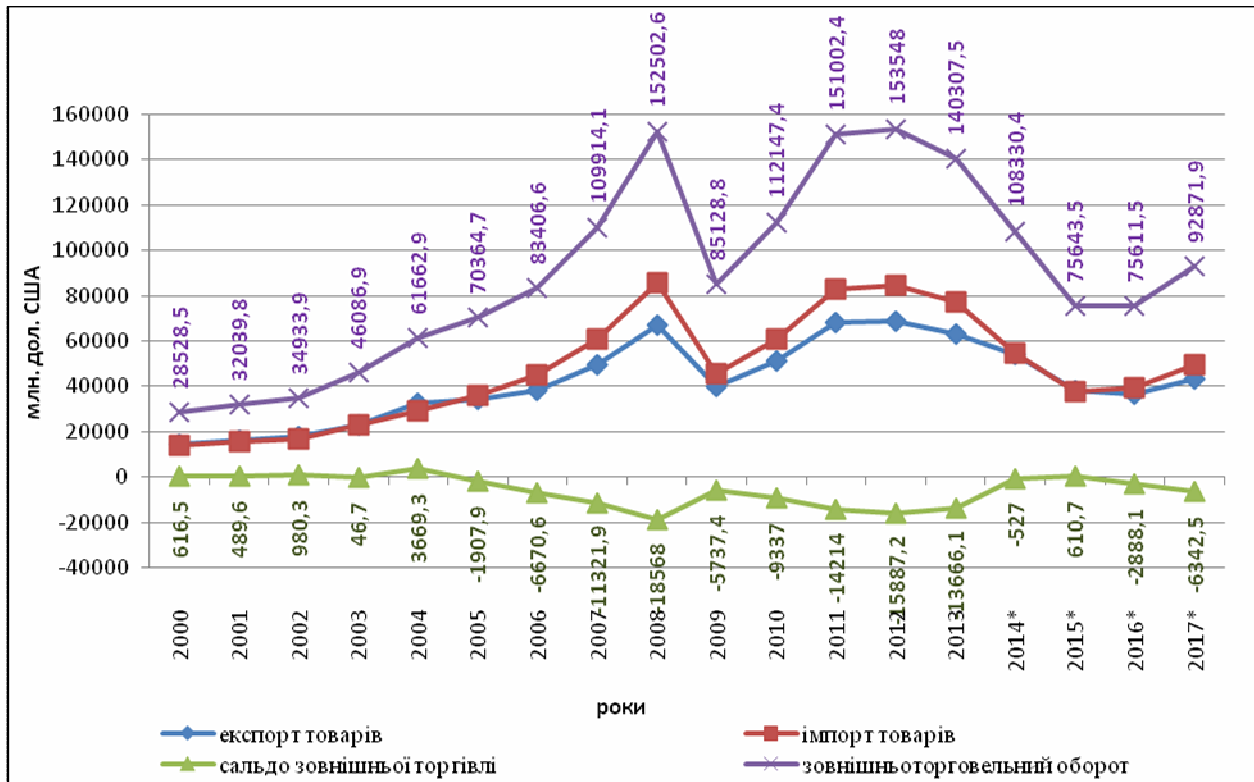
Порівняльний аналіз показників зовнішньої торгівлі товарами України в 2000-2017 рр. (табл. 3) показує, що в ХХІ ст. зовнішня торгівля товарами змі-

нювалася незначно: коефіцієнт імпоротної залежності залишався небезпечним (38,8-48,8 %), а національна економіка – надзвичайно відкритою (72,6-91,3 %);

зовнішня торгівля була в цілому збалансованою (в 2000, 2005 і 2015 рр. – з абсолютною збалансованою експорту й імпорту; в 2007, 2009, 2011, 2013 і 2017 рр. – з порівняною збалансованістю імпорту); показники інтенсивності експорту, імпорту та зовнішньоторговельного обороту до 2014 р. мали позитивні тенденції (окрім 2009 р.), а в 2014-2015 рр. – значно впали.

Динаміка обсягів зовнішньої торгівлі товарами України

В 2017 р. Україна експортувала товарів на суму 43264,7 млн. дол. США, а імпортувала – на суму 49607,2 млн. дол. США. Зовнішньоторговельний оборот склав 92871,9 млн. дол. США. Сальдо торгівлі було від'ємним (-6342,5 млн. дол. США) (рис. 1).



*В 2014-2016 рр. – без урахування тимчасово окупованої території АР Крим, м. Севастополя та частини зони проведення антитерористичної операції; в 2017 р. – без урахування тимчасово окупованої території АР Крим, м. Севастополя та частини тимчасово окупованих територій у Донецькій та Луганській областях

Рис. 1. Динаміка експорту, імпорту, зовнішньоторговельного обороту й сальдо торгівлі товарами України у 2000-2017 рр. (побудовано за [6-19])

Аналіз динаміки експорту, імпорту, зовнішньоторговельного обороту й сальдо торгівлі товарами України в 2000-2017 рр. дозволяє виявити наступні особливості:

1) з 2000 по 2008 рр. спостерігається стабільне зростання обсягів як експорту, так і імпорту товарів України, проте обсяги імпорту зростали швидше, що обумовило зменшення сальдо торгівлі товарами, яке з 2005 р. стало негативним. В 2008 р. спостерігаються найвищі обсяги імпорту товарів України протягом досліджуваного періоду та найвище переважання імпорту над експортом, що обумовило найнижче сальдо торгівлі товарами України в ХХІ ст. (-18568 млн. дол. США). В 2009 р. відбувається різке зменшення обсягів експорту й імпорту товарів через світову економічну кризу. При цьому зменшення обсягів імпорту відбулося більш інтенсивно, тому сальдо торгівлі товарами в цьому році, навпаки, збільшилося. З 2009 по 2012 рр. спостерігається черговий зріст обсягів експорту й імпорту товарів України. Обсяги імпорту зростають інтенсивніше, що

обумовлює погіршення сальдо торгівлі. З 2012 р. обсяги експорту й імпорту починають зменшуватися, і знову ж таки більш інтенсивно зменшуються обсяги імпорту, що позитивно позначилося на сальдо торгівлі товарами України, яке в 2015 р. стало позитивним. Проте це було характерно тільки для одного року, і в 2016-2017 рр. сальдо торгівлі товарами повернулося до від'ємних показників;

2) найвищий обсяг експорту товарів та зовнішньоторговельного обороту Україна мала в 2012 р. (68830,4 і 153548,0 млн. дол. США відповідно), а імпорту – в 2008 р. (85535,3 млн. дол. США);

3) протягом досліджуваного періоду позитивне сальдо торгівлі товарами в Україні спостерігалось з 2000 по 2004 рр. включно, а також у 2015 р. Найвище сальдо торгівлі товарами Україна мала в 2004 р. (3669,3 млн. дол. США), що можна пояснити стабільним розвитком економіки України в попередні роки, а найнижче – в 2008 р. (-18568,0 млн. дол. США), що стало наслідком світової економічної кризи, яка позначилася на цінах на сировину на світово-

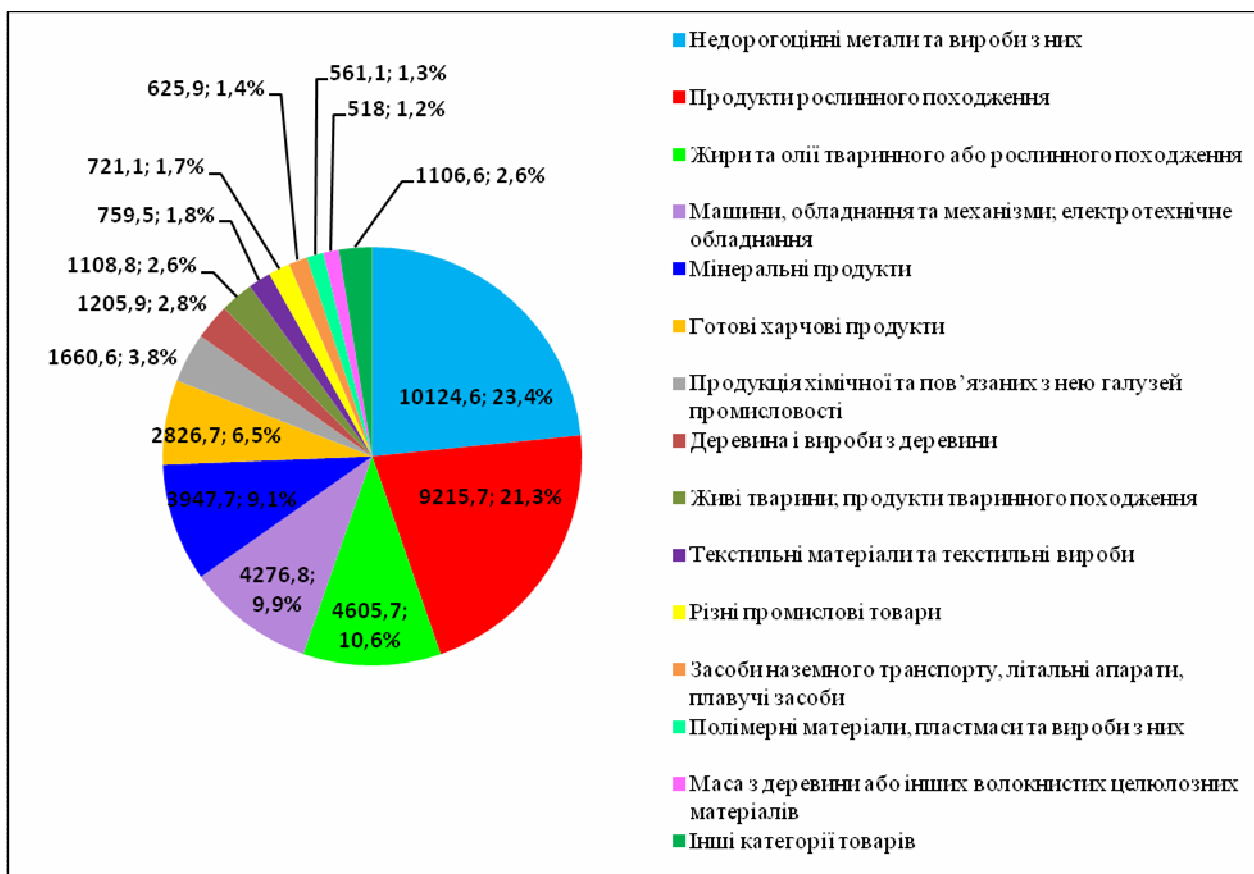
му ринку;

4) починаючи з 2000 р., обсяги експорту товарів, імпорتنі надходження та зовнішньоторговельний оборот зросли в 3,0-3,6 разів.

Трансформація товарної структури зовнішньої торгівлі товарами України

Сильною стороною зовнішньої торгівлі України є порівняно високий ступінь продуктової диверсифікації експорту товарів, що зменшує вплив змін у зовнішній кон'юктурі за окремими товарними групами на загальні показники країни. Слабка сторона – висока питома вага продукції первинного сектору економіки, ціна на яку на світовому ринку значно поступається продукції обробної промисловості. Осно-

ву товарної структури експорту України в 2017 р. склали недорогоцінні метали та вироби з них (зокрема, чорні метали); продукти рослинного походження (зокрема, зернові культури, насіння і плоди олійних рослин); жири та олії тваринного або рослинного походження; машини, обладнання та механізми, електротехнічне обладнання (зокрема, електричні машини; реактори ядерні, котли, машини); мінеральні продукти (зокрема, руди, шлаки і зола); готові харчові продукти; продукція хімічної та пов'язаних з нею галузей промисловості (разом склали 84,6 % від загального експорту товарів держави) (рис. 2).



*Без урахування тимчасово окупованої території АР Крим, м. Севастополя та частини тимчасово окупованих територій у Донецькій та Луганській областях

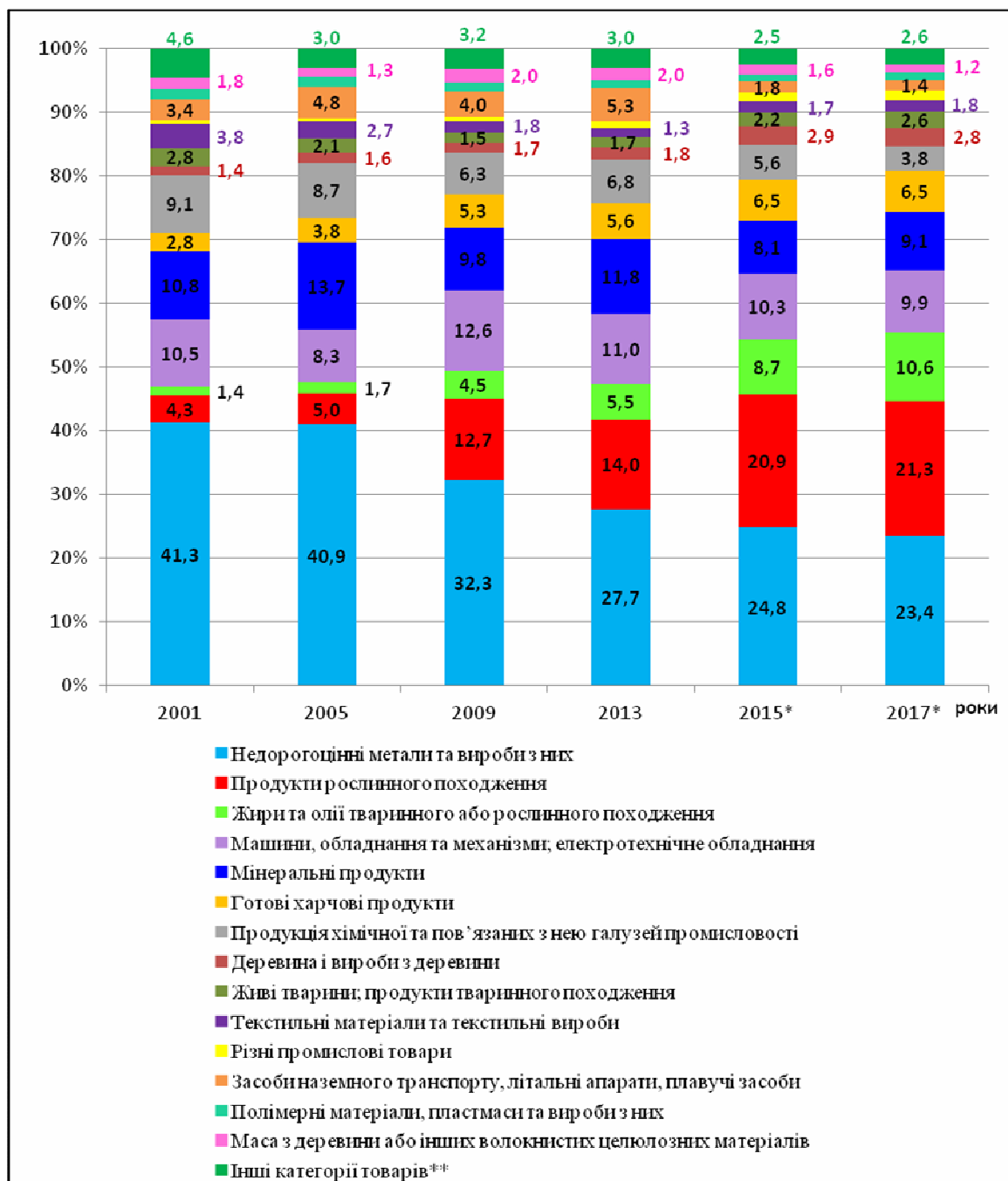
Рис. 2. Товарна структура експорту України за категоріями товарів у 2017 р.*, млн. дол. США, % (показані категорії товарів, питома вага яких в експорті більше 1 %) (побудовано за даними [11, 19])

Порівняльний аналіз товарної структури експорту товарів України в 2001-2017 рр. (рис. 3) показує, що за цей період:

1) головні товари в структурі експорту не змінилися (окрім категорії «Різні промислові товари», питома вага якої в 2000-х рр. була менше 1 %), проте структура експорту стала більш пропорційною (якщо в 2001 р. на одну категорію товарів – недорогоцінні товари та вироби з них – припадало більше 40 % всього експорту, то в 2017 р. такого сильно домінуючого товару вже не було);

2) значно збільшилася питома вага продукції агропромислового комплексу (зокрема, продуктів рослинного походження – з 4,3 до 21,3 %; жирів та олій тваринного або рослинного походження – з 1,4 до 10,6 %; готових харчових продуктів – з 2,8 до 6,5 %);

3) сильно зменшилася питома вага металургії (з 41,3 до 23,4 %), хімічної промисловості (з 9,1 до 3,8 %) та машинобудування (машини, обладнання та механізми; електротехнічне обладнання – з 10,5 до 9,9 %; засоби наземного транспорту, літальні апарати, плавучі засоби – з 3,4 до 1,4 %).



*В 2015 р. – без урахування тимчасово окупованої території АР Крим, м. Севастополя та частини зони проведення антитерористичної операції; в 2017 р. – без урахування тимчасово окупованої території АР Крим, м. Севастополя та частини тимчасово окупованих територій у Донецькій та Луганській областях.

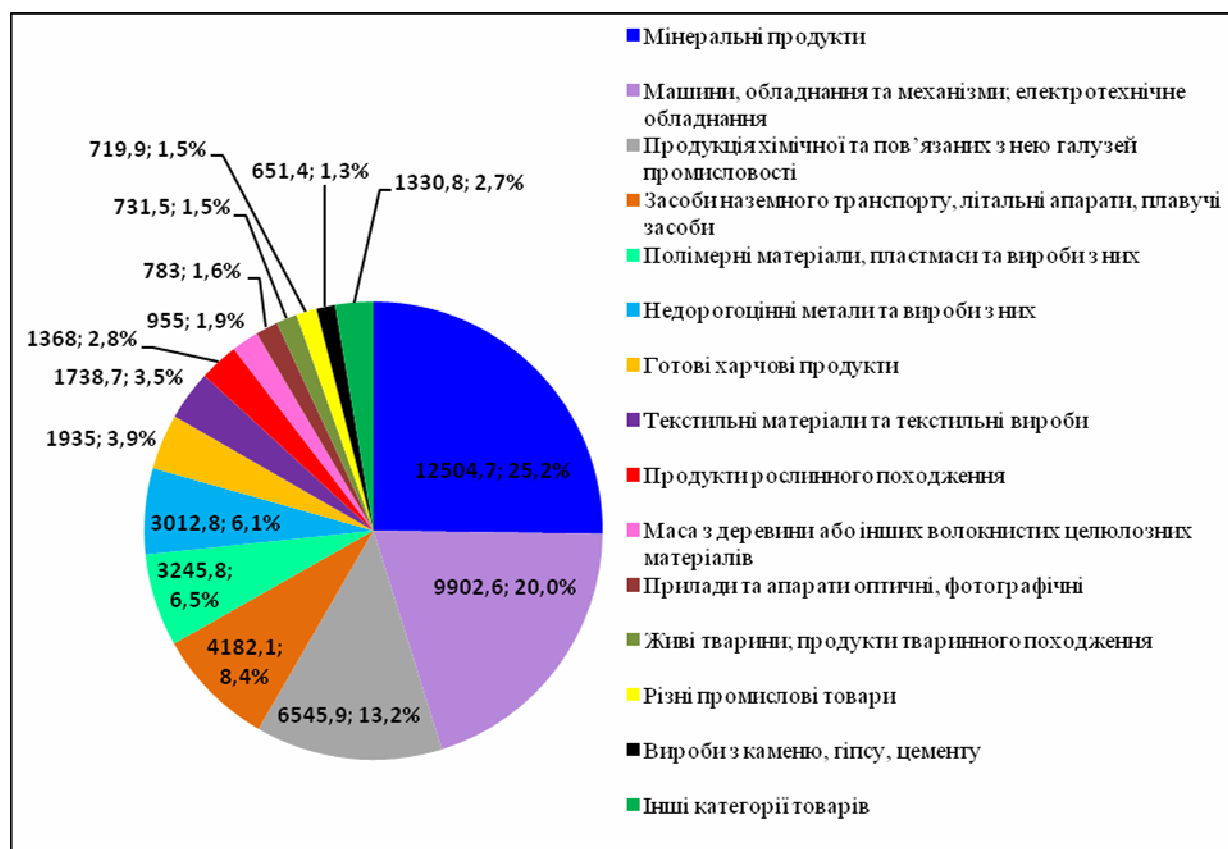
**Назви товарів надано згідно Класифікації видів економічної діяльності 2010 р.

Рис. 3. Динаміка товарної структури експорту України протягом 2001-2017 рр. (показані категорії товарів, питома вага яких в експорті у 2017 р. була більше 1 %) (побудовано за даними [6-19])

В цілому можна говорити про збільшення питомої ваги продукції галузей первинного сектору (за рахунок рослинництва) та зменшення – продукції вторинного сектору (за рахунок металургії, машинобудування, хімічної та деяких інших галузей промисловості).

У структурі імпорту товарів України в 2017 р. вагоме місце посідали мінеральні продукти (зокрема, палива мінеральні, нафта і продукти її перегонки); машини, обладнання та механізми, електротехнічне

обладнання (зокрема, реактори ядерні, котли, машини; електричні машини); продукція хімічної та пов'язаних з нею галузей промисловості; засоби наземного транспорту, літальні апарати, плавучі засоби (зокрема, засоби наземного транспорту, крім залізничного); полімерні матеріали, пластмаси та каучук (зокрема, пластмаси, полімерні матеріали; фармацевтична продукція); недорогоцінні метали та вироби з них; готові харчові продукти (склали 83,3 % усіх імпортованих до країни товарів) (рис. 4).



*Без урахування тимчасово окупованої території АР Крим, м. Севастополя та частини тимчасово окупованих територій у Донецькій та Луганській областях

Рис. 4. Товарна структура імпорту України за категоріями товарів у 2017 р.*, млн. дол. США, % (показані категорії товарів, питома вага яких в імпорті більше 1 %) (побудовано за даними [11, 19])

Порівняльний аналіз товарної структури імпорту товарів України в 2001-2017 рр. (рис. 5) показує, що за цей період:

1) головні товари в структурі імпорту не змінилися (окрім категорії «Різні промислові товари», питома вага якої на початку 2000-х рр. була менше 1 %; в 2013 р. до головних товарів з часткою понад 1 % додалася категорія «Взуття, головні убори, парасольки»), проте структура імпорту стала більш пропорційною (якщо в 2001 р. на одну категорію товарів – мінеральні ресурси – припадало майже 43 % всього імпорту, то в 2017 р. такого сильно домінуючого товару вже не було);

2) значно зменшилась питома вага сировини – з 42,6 до 25,2 %, що пов'язано, головним чином, з різким зменшенням споживання природного газу; несуттєво – продукції целюлозо-паперової та текстильної промисловості, оптичних і фотографічних приладів та апаратів. Частка всіх інших категорій товарів зросла, особливо продукції хімічної та пов'язаних з нею галузей промисловості (з 7,1 до 13,2 %) та машин, обладнання та механізмів, електротехнічного обладнання (з 15,1 до 20 %).

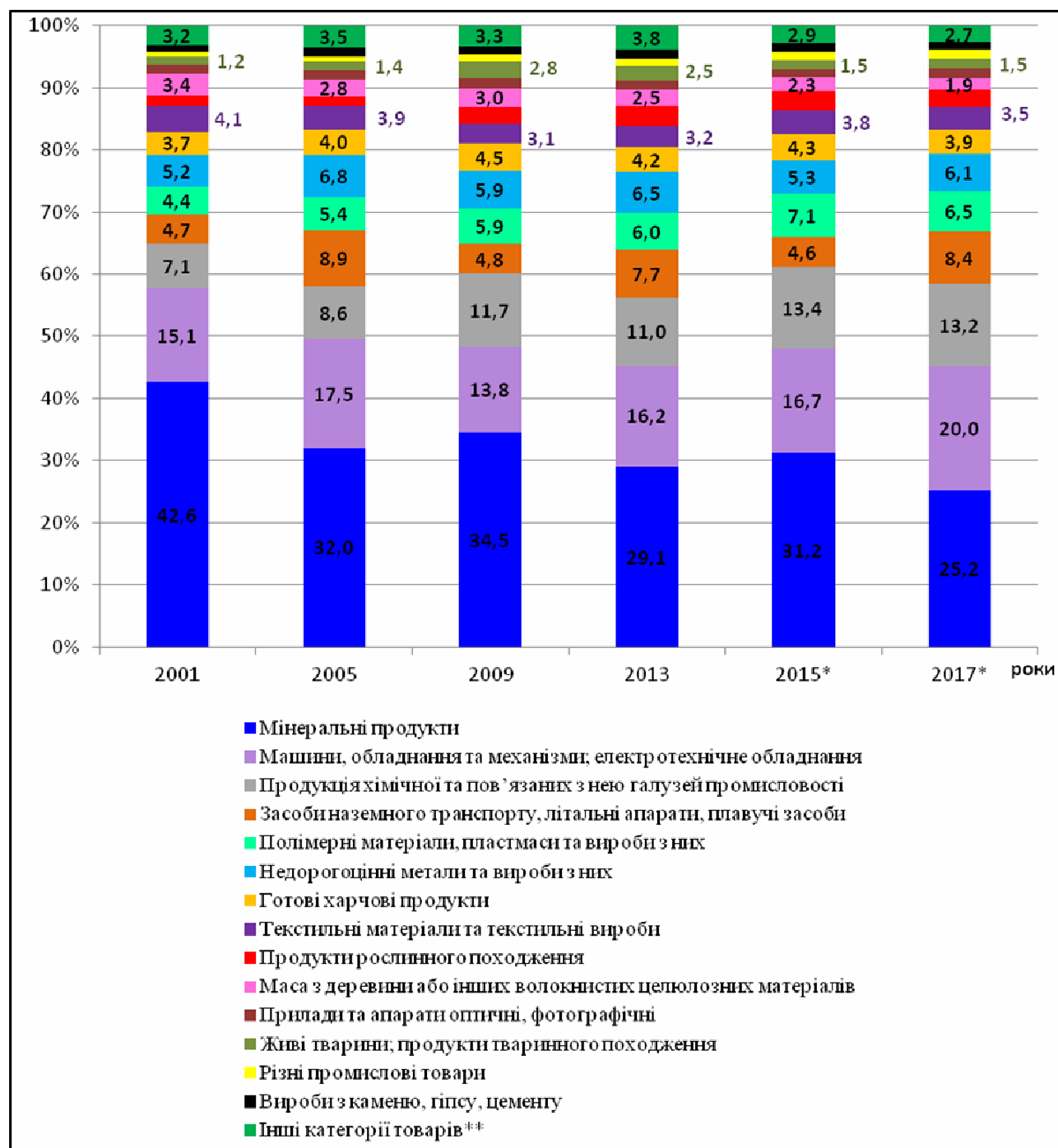
У 2017 р. найбільше позитивне сальдо склалось у зовнішній торгівлі продуктами рослинного по-

ходження (7847,7 млн. дол. США), недорогоцінними металами та виробами з них (7111,9 млн. дол. США), жирами та оліями тваринного або рослинного походження (4339 млн. дол. США). Найзбитковішою стала зовнішня торгівля мінеральними продуктами (-8557 млн. дол. США), машинами, обладнанням та механізмами, електротехнічним обладнанням (-5625,8 млн. дол. США), продукцією хімічної та пов'язаних з нею галузей промисловості (-4885,3 млн. дол. США) (рис. 6).

Трансформація географічної структури зовнішньої торгівлі товарами України

На початку ХХІ ст. географія зовнішньої торгівлі товарами України залишається досить широкою, що в сучасних умовах економічного розвитку є потужним важелем нарощування експортного потенціалу країни. Кількість країн-партнерів у 2017 р. дорівнювала 166 [11, 19] (рис. 7).

У 2017 р. найбільший експорт товарів Україна здійснювала до Російської Федерації (9,1 % від загального обсягу експорту товарів), Польщі (6,3 %), Туреччини (5,8 %), Італії (5,7 %), Індії (5,1 %). Протягом 2001-2017 рр. головними партнерами України залишалися Російська Федерація, Польща, Туреччина, Італія, Китай, Німеччина (рис. 8).



*В 2015 р. – без урахування тимчасово окупованої території АР Крим, м. Севастополя та частини зони проведення антитерористичної операції; в 2017 р. – без урахування тимчасово окупованої території АР Крим, м. Севастополя та частини тимчасово окупованих територій у Донецькій та Луганській областях.

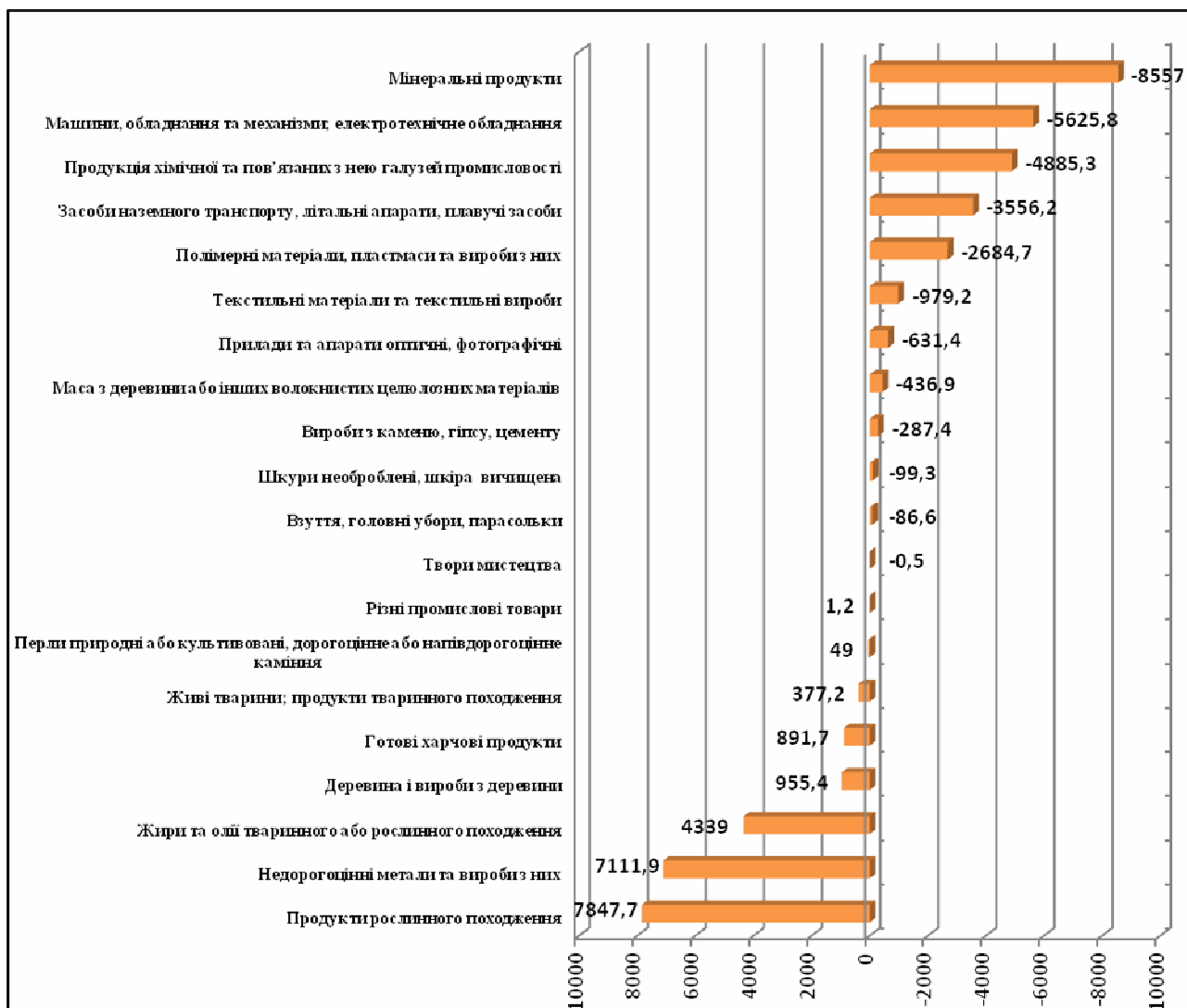
**Назви товарів надано згідно Класифікації видів економічної діяльності 2010 р.

Рис. 5. Динаміка товарної структури імпорту України протягом 2001-2017 рр. (показані категорії товарів, питома вага яких в імпорті у 2017 р. була більше 1 %) (побудовано за даними [6-19])

Важливою тенденцією останніх років стало нарощування експорту до країн Європи, Азії та Африки при відповідному скороченні експорту до країн СНД і Америки (рис. 9).

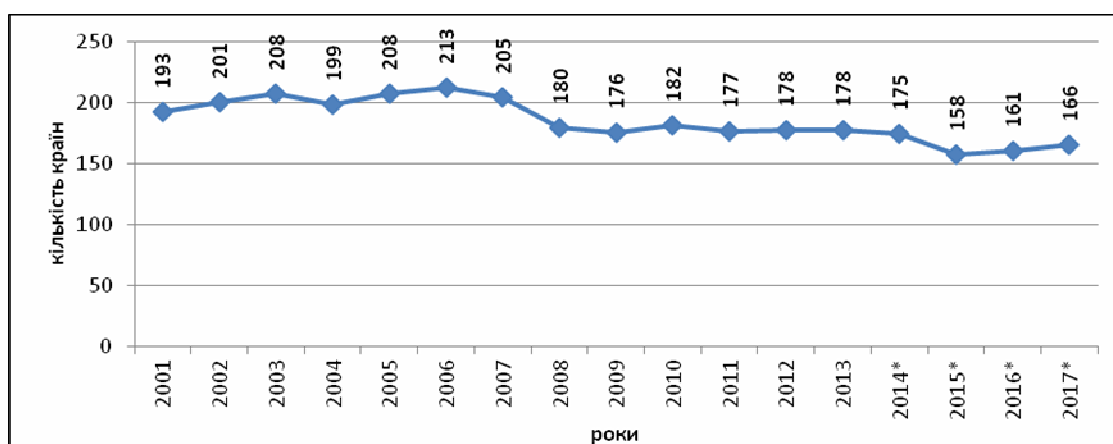
Найбільший імпорт товарів до України в 2017 р. надходив з Російської Федерації (14,5 % від загаль-

ного обсягу імпорту товарів), Китаю (11,4 %), Німеччини (11,0 %), Польщі (7,0 %), Білорусі (6,5 %), США (5,1 %). Протягом 2001-2017 рр. головними партнерами України залишалися Російська Федерація, Німеччина, Польща, Білорусь, США, Італія (рис. 10).



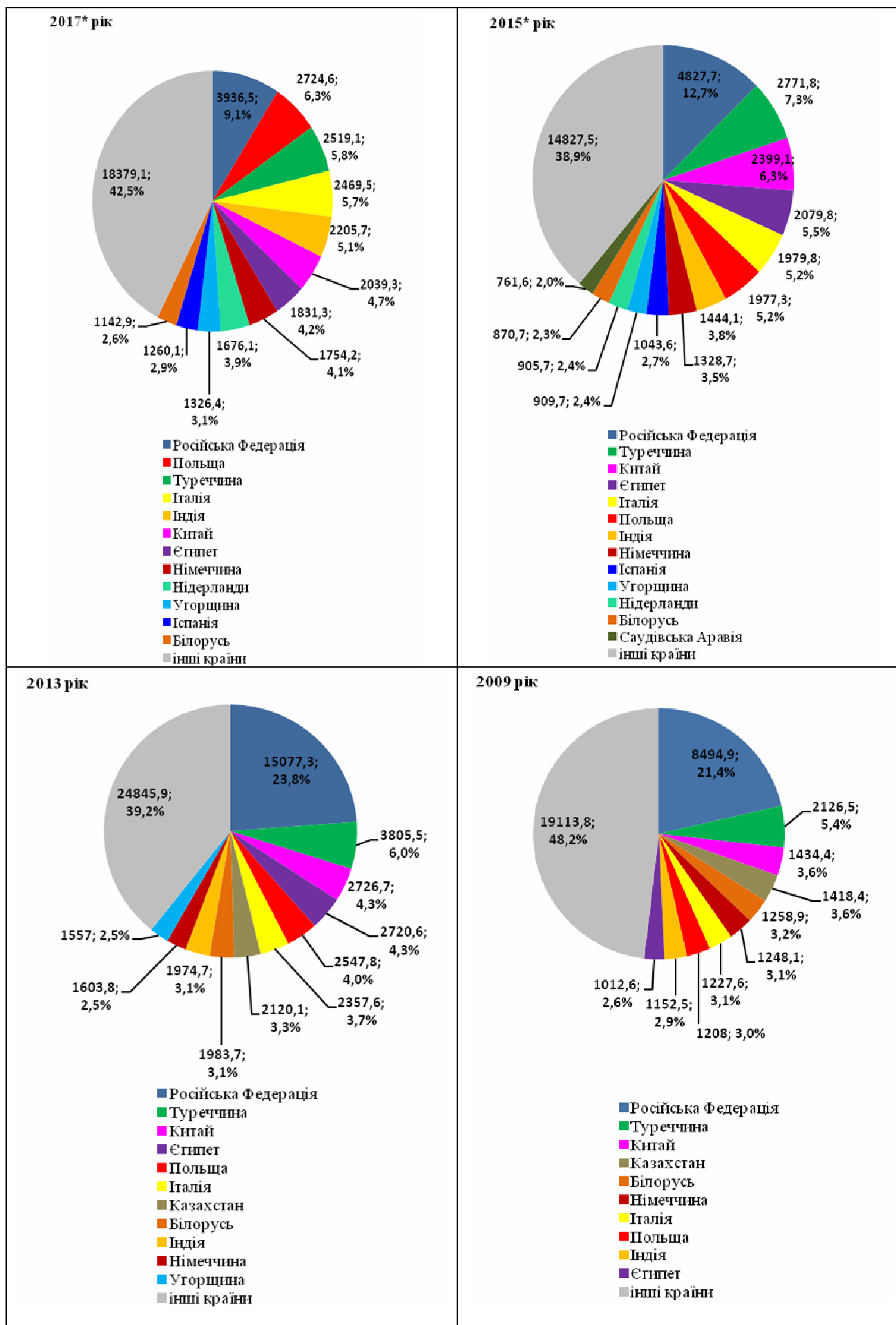
*Без урахування тимчасово окупованої території АР Крим, м. Севастополя та частини тимчасово окупованих територій у Донецькій та Луганській областях

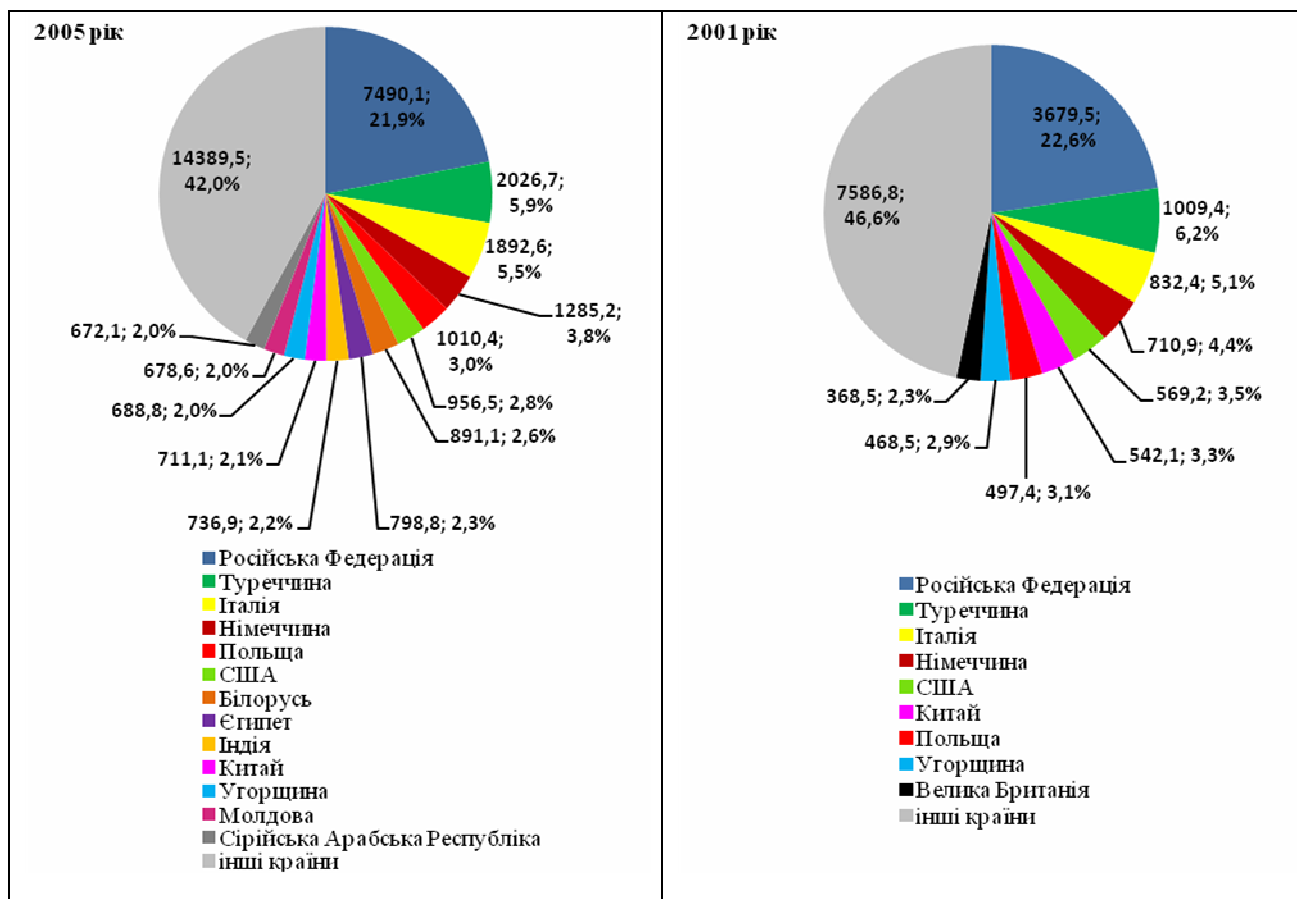
Рис. 6. Сальдо зовнішньої торгівлі товарами України в 2017 р.*, млн. дол. США (побудовано за [6-19])



*В 2014-2016 рр. – без урахування тимчасово окупованої території АР Крим, м. Севастополя та частини зони проведення антитерористичної операції; в 2017 р. – без урахування тимчасово окупованої території АР Крим, м. Севастополя та частини тимчасово окупованих територій у Донецькій та Луганській областях

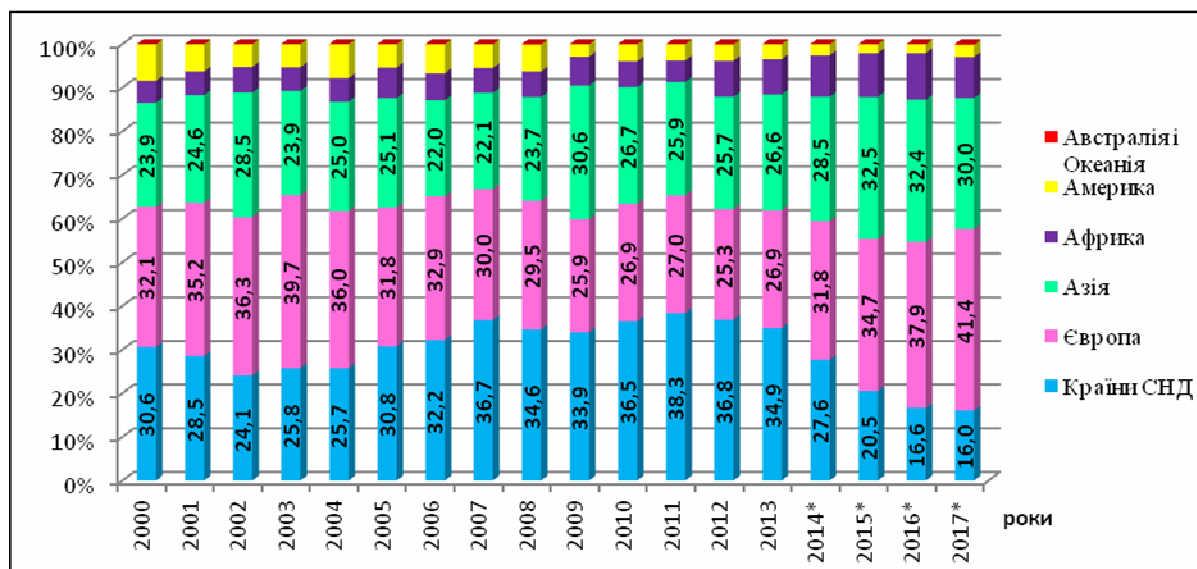
Рис. 7. Динаміка кількості країн-партнерів у зовнішній торгівлі товарами України в 2001-2017 рр. (побудовано за [6-19])





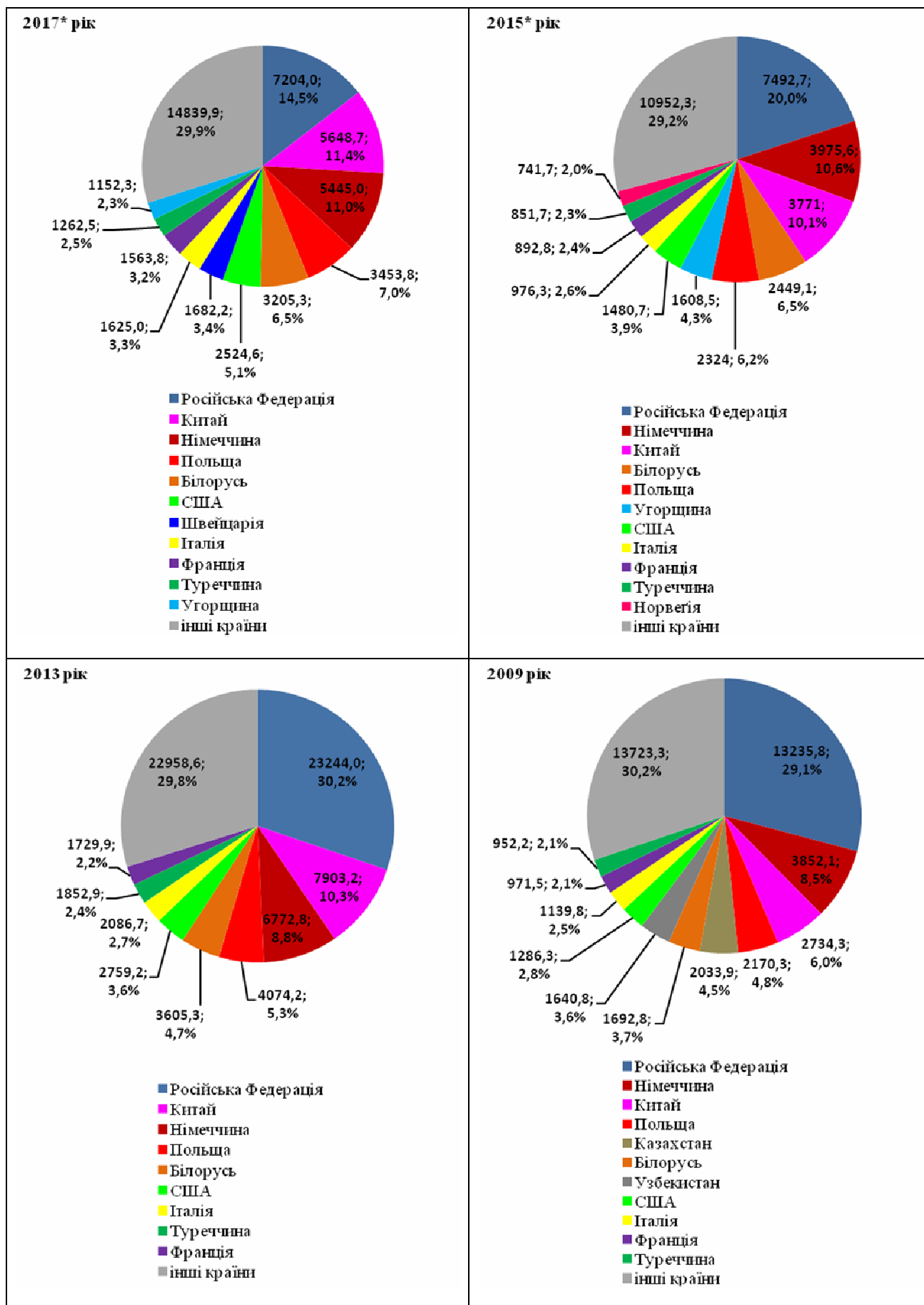
*В 2015 р. – без урахування тимчасово окупованої території АР Крим, м. Севастополя та частини зони проведення антитерористичної операції; в 2017 р. – без урахування тимчасово окупованої території АР Крим, м. Севастополя та частини тимчасово окупованих територій у Донецькій та Луганській областях.

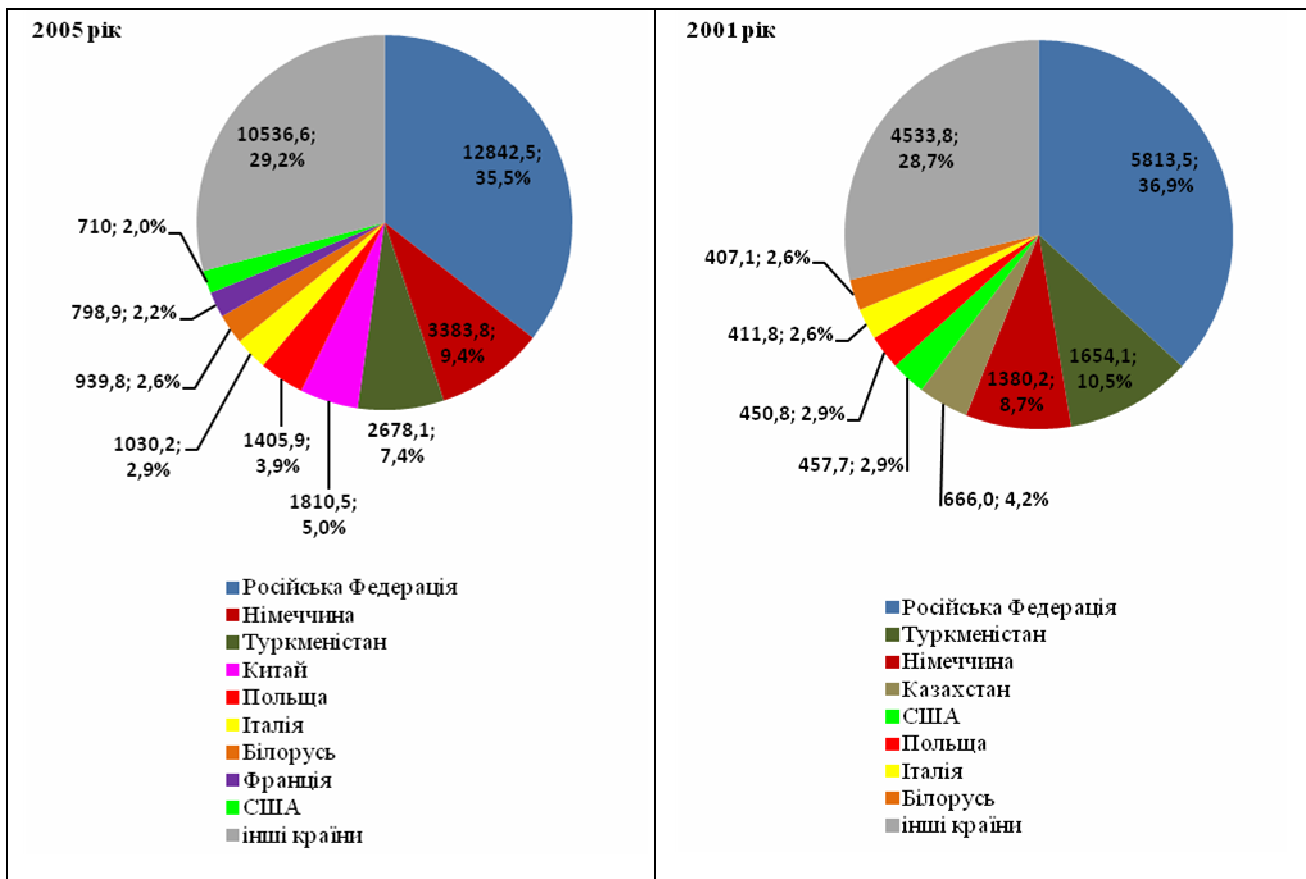
Рис. 8. Країни – провідні партнери України в експорті товарів у 2001-2017 рр., млн. дол. США, % (показані країни, питома вага яких в експорті товарів більше 2 %) (побудовано за [6-19])



*В 2014-2016 рр. – без урахування тимчасово окупованої території АР Крим, м. Севастополя та частини зони проведення антитерористичної операції; в 2017 р. – без урахування тимчасово окупованої території АР Крим, м. Севастополя та частини тимчасово окупованих територій у Донецькій та Луганській областях

Рис. 9. Динаміка обсягів експорту товарів за географічною структурою в 2001-2017 рр., % (побудовано за [6-19])





*В 2015 р. – без урахування тимчасово окупованої території АР Крим, м. Севастополя та частини зони проведення антитерористичної операції; в 2017 р. – без урахування тимчасово окупованої території АР Крим, м. Севастополя та частини тимчасово окупованих територій у Донецькій та Луганській областях

Рис. 10. Країни – провідні партнери України в імпорті товарів у 2001-2017 рр., млн. дол. США, % (показані країни, питома вага яких в імпорті товарів більше 2 %) (побудовано за [6-19])

Як і з експортом, відбувається скорочення імпорту з країн СНД. Питома вага всіх інших регіонів світу в обсязі імпорту товарів України збільшується (рис. 11).

Отже, незважаючи на різке скорочення торговельних зв'язків з Російською Федерацією, вона все ще залишається найбільшим партнером у зовнішній торгівлі товарами України. Економіки України і Російської Федерації мали тривалі глибокі коопераційні зв'язки, що відобразалося на обсягах і структурі міждержавної торгівлі. Розрив цих зв'язків, що почався в 2014 р., болоче вдарив по основним експортоорієнтованим галузям економіки України – чорній металургії, машинобудуванню, хімічній промисловості. Підвищилися політичні ризики роботи на російському ринку. У 2013 р. підприємства України зіткнулися з особливо широким застосуванням торговельних бар'єрів з боку Російської Федерації, розривом угод. У 2014 р. у зв'язку із загостренням відносин між Україною та Російською Федерацією через ситуацію в Криму та на Донбасі скорочення товарообороту набуло обвального характеру.

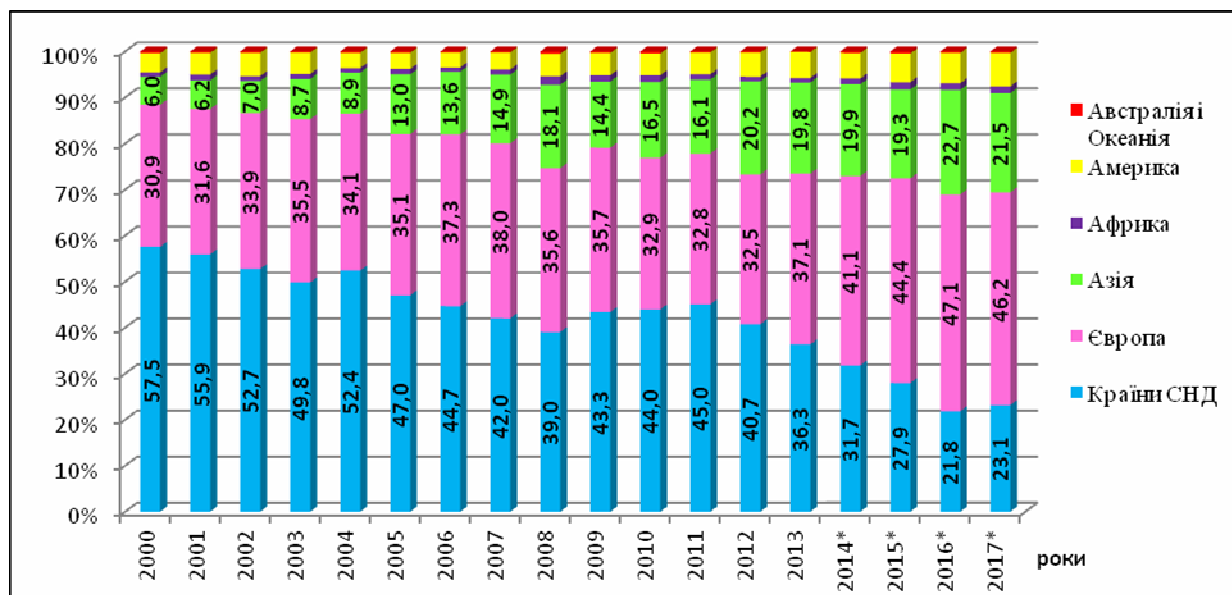
Серед регіонів світу найбільшим торговельним партнером України в останні роки стає Європа. Доступ до європейського ринку полегшився з підписанням Угоди про асоціацію та зону вільної торгівлі

між Україною та ЄС. Разом європейські країни охоплюють понад 43,8 % обсягів експортно-імпортних операцій України (рис. 11, 13). В той же час слід враховувати, що створення зони вільної торгівлі з країнами ЄС відкриває європейський ринок для українських товарів, однак низька конкурентоспроможність вітчизняних товарів та обмежуючі квоти з боку ЄС на імпорт окремих товарів з України ставлять українських товаровиробників перед необхідністю пошуку нових ринків – перш за все в Азії та Африці.

З 166-ти партнерів у 2017 р. Україна мала від'ємне сальдо зовнішньої торгівлі з 65 країнами (39,2 %). Найзбитковіша зовнішня торгівля товарами в 2017 р. була з Німеччиною, Китаєм, Російською Федерацією, Білоруссю і США. Навпаки, найбільший прибуток Україна отримала від зовнішньої торгівлі з Єгиптом, Індією, Туреччиною, Нідерландами та Італією (рис. 12).

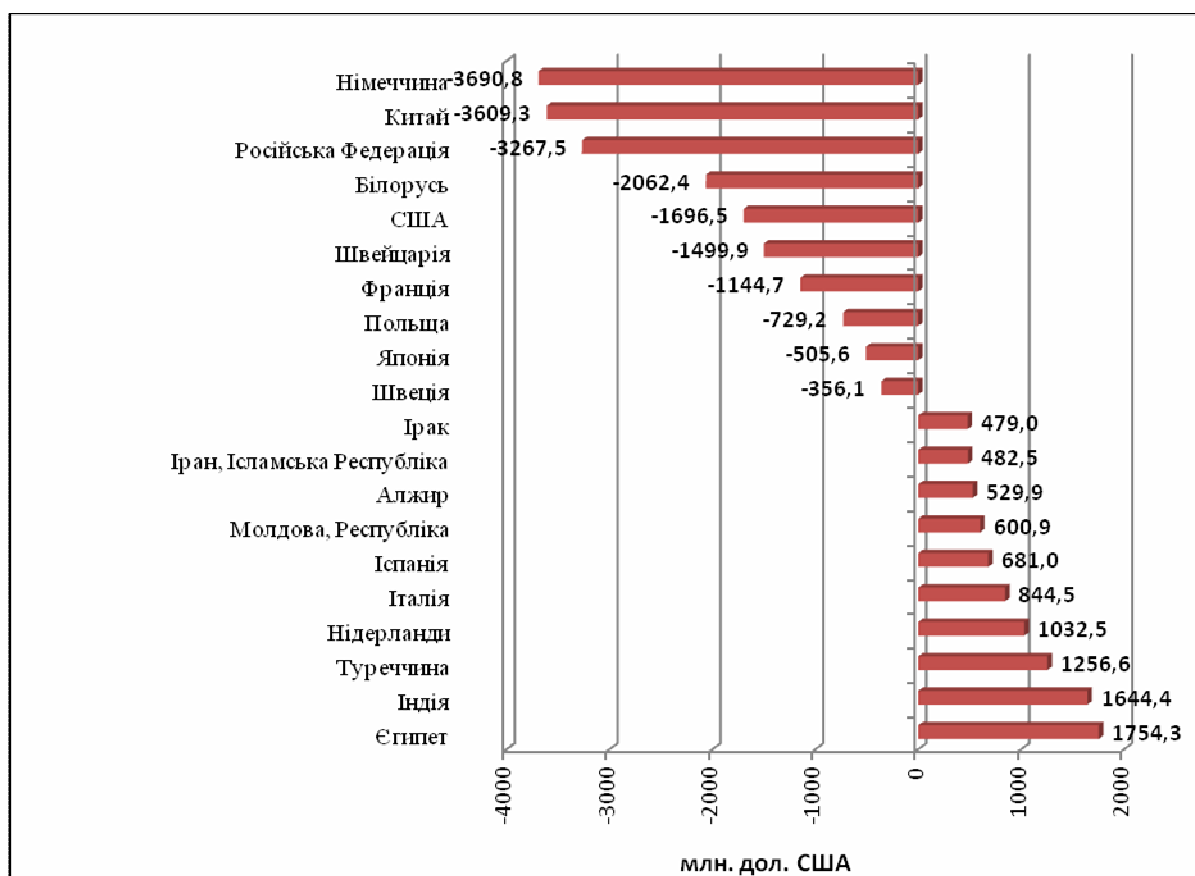
Заходи з покращення структури зовнішньої торгівлі товарами

Для збалансування зовнішньої торгівлі товарами України необхідно вжити комплекс заходів, спрямованих на підвищення ефективності експортної діяльності та імпортозаміщення у певних секторах економіки (табл. 4).



*В 2014-2016 рр. – без урахування тимчасово окупованої території АР Крим, м. Севастополя та частини зони проведення антитерористичної операції; в 2017 р. – без урахування тимчасово окупованої території АР Крим, м. Севастополя та частини тимчасово окупованих територій у Донецькій та Луганській областях

Рис. 11. Динаміка обсягів імпорту товарів за географічною структурою в 2001-2017 рр., % (побудовано за [6-19])



*Без урахування тимчасово окупованої території АР Крим, м. Севастополя та частини тимчасово окупованих територій у Донецькій та Луганській областях

Рис. 12. Топ-10 країн-партнерів України з найнижчим і найвищим сальдо зовнішньої торгівлі товарами в 2017 р.* (побудовано за [11, 19])

Таблиця 4

Заходи з покращення структури зовнішньої торгівлі товарами України
(складено авторами за [3, 20, 23, 27])

Основні напрями нарощування експортного потенціалу України	Основні напрями оптимізації імпорту в Україні
<ul style="list-style-type: none"> - орієнтація на експорт високоякісного прокату, металомісткої продукції, включаючи транспортні засоби (зокрема судна, літаки, залізничну техніку), металорізальні верстати, комплексне устаткування, особливо гірниче, енергетичне, металургійне, хімічне; - розвиток спеціалізованого, орієнтованого на міжнародні ринки комплексу виробництва ракетної та авіапродукції; - створення нового виробничого комплексу на основі галузей з видобутку рідкоземельних металів, розвитку мікроелектроніки, випуску комп'ютерів, побутової техніки із залученням іноземного капіталу; - формування нового наукоємного комплексу на базі виробництв, що безпосередньо пов'язані з реалізацією перспективних науково-технічних досягнень; - проведення державної політики, спрямованої на сприяння перепрофілюванню підприємств, що дасть їм можливість переорієнтуватися на випуск конкурентоспроможної продукції, яка користуватиметься попитом як на внутрішньому, так і світовому ринку; - активізація переговорного процесу щодо створення зони вільної торгівлі «плюс» між Україною та Європейським Союзом у зв'язку з підписанням Україною Угоди про Асоціацію з ЄС; - прискорення діяльності з гармонізації сертифікації української продукції відповідно до стандартів ЄС у зв'язку з тим, що чимало українських підприємств досі акцентують увагу на низькій вартості робочої сили і сировини, а не на підвищенні якості продукції; - активізація співпраці зі структурами СОТ щодо реалізації позитивного потенціалу членства України. Українські підприємці до цього часу не відчули переваг участі країни в СОТ, тому все більшого значення набуває діяльність представництва України при СОТ, активність торговельно-економічних місій України за кордоном, кваліфікована робота юристів щодо скасування антидмпінгових санкцій проти України, відшкодування збитків, завданих країнами, які не входять до СОТ; - сприяння динамічному розвитку експорту сільськогосподарської продукції – потужний аграрний потенціал України дає змогу динамічно нарощувати експортні поставки продовольчих товарів. Проте застаріла транспортна інфраструктура, брак зерносховищ, відсутність держави як потужного гравця на ринку для забезпечення прийнятних для виробників цін, відсутність системи сертифікації продукції, гармонізованої відповідно до норм ЄС, не дозволяють аграрному сектору повністю реалізувати експортні можливості. 	<ul style="list-style-type: none"> - проведення радикальної раціоналізації енерго- та матеріалоспоживання, поширення заощадливих технологій у виробництві та в побуті; - перехід на використання енергоносіїв, альтернативних імпортом, – сонячної, вітрової енергії, супутнього газу, метану вугільних шарів, етилового спирту (його джерелом можуть бути побічна продукція та відходи сільського господарства й агропереробки, зокрема, цукрових буряків після технологічного процесу виготовлення цукру); - збільшення розвідок та власного видобутку нафти й газу, більш повний видобуток паливних родовищ; - поширення виробництва на території України тих товарів іноземних марок, які характеризуються найкращими споживчими властивостями та користуються високим попитом; - розвиток виробництв, альтернативних імпортом поставкам (з урахуванням того, що магістральним напрямом формування відкритої економіки України має стати модель національної спеціалізації, а не економіки, яка будується за принципом «все – сам»); - стимулювання інвестицій у розвиток тих галузей економіки, які програють у міжнародній конкурентній боротьбі, зокрема, і на національному ринку через об'єктивний дефіцит у них фінансових ресурсів.

Напрями подальших досліджень. Виходячи з актуальності досліджуваної тематики, складності та багатоаспектності проблем зовнішньої торгівлі, у подальшому вбачається необхідність дослідження зовнішньоторговельних зв'язків між Україною та окремими країнами світу. У цьому контексті доцільно проаналізувати різні сценарії розвитку зовнішньої торгівлі, зокрема:

- перспективи розвитку торговельних зв'язків України з Російською Федерацією після можливої нормалізації відносин;

- розвиток торговельних зв'язків України з країнами ЄС в умовах поглиблення інтеграції України до європейських структур;

- налагоджування торговельних зв'язків України з позаєвропейськими країнами, освоєння нових ринків збуту українських товарів.

Висновки. Проведене дослідження дає підстави зробити такі висновки:

1. Стан зовнішньої торгівлі товарами України перебуває у безпосередній залежності від розвитку її економіки. Зокрема, у періоди економічних криз сут-

тево зменшуються обсяги експорту й імпорту товарів та, відповідно, зовнішньоторговельний оборот. Салдо зовнішньої торгівлі товарами переважно від'ємне і практично не залежить від стану економіки, стадії її зростання чи спаду.

2. У товарній структурі експорту переважають товари сировинного спрямування і продовольство, що відповідає рівню країни з середнім рівнем економічного розвитку, причому частка продукції АПК за останні роки зростає, що свідчить про поступову трансформацію структури економіки України з індустріально-аграрної на аграрно-індустріальну. З метою оптимізації товарної структури експорту необхідно підвищувати частку готової продукції, як традиційних експортних галузей (АПК, чорна металургія), так і найбільш конкурентоспроможних галузей машинобудування і хімічної промисловості, зокрема наукоємних.

3. У товарній структурі імпорту значну частину становлять товари сировинної групи, а також продукція машинобудування і хімічної промисловості,

значна частина якої може бути вироблена в Україні. Тому для скорочення обсягів імпорту та оптимізації його товарної структури необхідно проводити політику імпортозаміщення, спрямовану на розвиток вітчизняного виробництва.

4. Різке скорочення зовнішньоторговельного обороту з Російською Федерацією та складнощі у торгівлі з країнами ЄС, зумовлені низькою конкурентоспроможністю українських товарів і часто невідповідністю їх стандартам ЄС, спонукають вітчизняних товаровиробників шукати нові ринки збуту переважно у країнах Азії та Африки.

5. Для підвищення стійкості економіки України необхідно зменшувати її відкритість, але не шляхом зменшення експорту товарів, а за рахунок зростання ВВП та розвитку виробництва товарів для наповнення внутрішнього ринку. При цьому частка експорту від ВВП буде скорочуватись, що зменшуватиме залежність економіки України від кон'юнктури на світових ринках та її вразливість до світових економічних криз.

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Надійшла до редколегії 25.04.2019 р.

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Правила оформлення та подання статей

«Часопис соціально-економічної географії» приймає до друку матеріали обсягом понад 20 друкованих сторінок до рубрики «Горизонти науки», понад 15 сторінок до рубрики «Наукові повідомлення», до 5 сторінок до рубрики «Рецензії», до 3 сторінок до рубрики «Постаті», до 1 сторінки до рубрик «Хроніка» та «Ювілеї».

Згідно *Постанови ВАК України «Про підвищення вимог до фахових видань, внесених до переліків ВАК України»* за № 7-05/1 від 15 січня 2003 р. стаття повинна мати такі необхідні *елементи*:

1) постановка проблеми у загальному вигляді та її зв'язок із важливими науковими чи практичними завданнями; 2) аналіз останніх досліджень і публікацій, в яких започатковано розв'язання даної проблеми і на які спирається автор. Згідно з вимогами, що висувуються до наукових видань міжнародного рівня, статті мають містити глибокий аналіз попередніх досліджень; 3) виділення невирішених раніше частин загальної проблеми, котрим присвячується означена стаття; 4) формулювання цілей статті (постановка завдання); 5) виклад основного матеріалу дослідження з повним обґрунтуванням отриманих наукових результатів; 6) висновки з даного дослідження і перспективи подальших розвідок у даному напрямку.

Вимоги до оформлення статті: Текстовий редактор Microsoft Word. Всі поля по 20 мм, формат 210x297 мм, шрифт Times New Roman 14 пт, інтервал 1,5. Для статті необхідно вказати УДК (у лівому верхньому куті), нижче посередині рядка ім'я та прізвище автора, під ними – його науковий ступінь, вчене звання та посада. Нижче наводяться e-mail та ORCID ID автора, відомості про устанovu, її поштова адреса з індексом. Після цього з нового рядка посередині великими буквами наводиться заголовок статті.

Під заголовком з абзацу наводиться *анотація статті* (не менш як 1800 знаків) та *ключові слова* (5 – 8 слів чи словосполучень) українською мовою (шрифт 10 пт). Нижче наводиться ім'я та прізвище автора, назва статті, анотація та ключові слова російською мовою (шрифт 10 пт, курсив).

Після анотацій подається ім'я та прізвище автора, назва статті, реферат та ключові слова англійською мовою (шрифт 10 пт).

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Наукове видання

ЧАСОПИС соціально-економічної географії

Збірник наукових праць

Випуск 26

Українською, англійською та російською мовами

Комп'ютерне верстання – *Юрій Кандиба*

Підписано до друку 03.06.2019 р. Формат 60x84/8. Папір офсетний.

Друк ризографічний. Ум. друк. арк. 6,7. Обл.-вид. арк. 7,8.

Наклад 50 пр. Ціна договірна.

Видавець та виготовлювач

Харківський національний університет імені В.Н. Каразіна

61022, Харків, майдан Свободи, 4

Свідоцтво суб'єкта видавничої справи ДК № 3367 від 13.01.09.