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STRATEGY AND TACTICS OF BUSINESS COLLABORATION: CLUSTERING AND OTHER JOINT ACTIVITIES

Collaboration (or cooperation) between business entities is an essential element of business strategy and tactics, as the synergistic effects synthesized by this phenomenon can manifest themselves in increased competitiveness of business entities, the development of their innovation, the reduction of operational risks, and in other areas. The above provisions emphasize the overall significance of research on the strategy and tactics of collaboration among business entities. Therefore, the purpose of the article is to identify the characteristics of forming a strategy and tactics for collaboration among business entities through clustering and other forms of joint activities. Based on the study of the characteristics of forming the strategy and tactics of collaboration among business entities, particularly in the form of clusters and other joint activities, several conclusions have been drawn. It has been noted that while collaboration among business entities can take various forms, the format of the strategy and tactics of collaboration among business entities remains unchanged. It has been demonstrated that there are classical elements of collaboration strategy and tactics, which include: the circle of collaboration participants, the format of goals and objectives, the format of strategy, the format of tactical actions, the format of resource allocation and responsibilities, the format of monitoring and evaluation, the format of communication and interaction, and the format of analysis and correction of collaboration strategy and tactics. Each of the outlined elements, while having a common essence, takes on individual content that depends on the form of collaboration. It has been observed that the better the classical elements of strategy and tactics align with the form of collaboration, the greater the mutual benefit and synergy. Under these conditions, collaboration allows participants in joint activities to achieve maximum mutual benefit and a synergistic effect that exceeds individual achievements. For example, in clusters, various business entities can jointly utilize resources and knowledge for the collaborative development of innovative products. The research results allow for an exploration of the Ukrainian context of business entity collaboration in the direction of clustering and other joint activities.

Keywords: *format of goals and objectives, format of strategy, format of tactical actions, resource allocation, monitoring, and evaluation, communication and interaction.*

JEL classification: *A14, C80, C88*

СТРАТЕГІЯ І ТАКТИКА КОЛАБОРАЦІЇ СУБ'ЄКТІВ ГОСПОДАРЮВАННЯ: КЛАСТЕРИЗАЦІЯ ТА ІНША СПІЛЬНА ДІЯЛЬНІСТЬ

Колаборація (або співпраця) між суб'єктами господарювання є важливим елементом бізнес-стратегії та тактики, оскільки синергетичні ефекти, породжені цим явищем, можуть проявлятися у збільшенні конкурентоспроможності суб'єктів господарювання, розвитку їх інноваційності, зниженні операційних ризиків та інших сферах. Наведені вище положення звертають увагу на загальне значення досліджень щодо стратегій та тактик колаборації суб'єктів господарювання. Таким чином, метою цієї статті є визначення особливостей формування стратегій і тактик колаборації суб'єктів господарювання в контексті кластеризації та інших видів спільної діяльності. На основі проведеного дослідження щодо особливостей формування стратегій і тактик колаборації суб'єктів господарювання, зокрема у формі кластерів та інших форм спільної діяльності, було отримано кілька важливих висновків. Зауважимо, що хоча

колаборація суб'єктів господарювання може приймати різні форми, формат її стратегії і тактики залишається сталим. Доведено, що класичні елементи стратегії та тактики колаборації охоплюють: коло учасників колаборації, формат цілей і завдань, формат стратегії, формат тактики дій, формат розподілу ресурсів і відповідальності, формат контролю та оцінки, формат комунікації та взаємодії, формат аналізу і корекції стратегії й тактики колаборації. Кожен із наведених елементів, хоча має загальний зміст, набуває індивідуального наповнення, що залежить від форми колаборації. Встановлено, що чим краще класичні елементи стратегії і тактики відповідають формі колаборації, тим вища взаємна користь і синергія від неї. Саме в таких умовах колаборація дозволяє учасникам спільної діяльності отримувати максимальну взаємну користь та синергетичний ефект, який перевищує індивідуальні досягнення. Наприклад, у кластерах різні суб'єкти господарювання можуть спільно використовувати ресурси та знання для спільної розробки інноваційних продуктів. Отримані результати дослідження дозволяють вивчити контекст колаборації суб'єктів господарювання в Україні, зокрема в напрямках кластеризації та іншої спільної діяльності.

Ключові слова: формат цілей і завдань, формат стратегії, формат тактики дій, розподіл ресурсів, контроль і оцінка, комунікація і взаємодія.

Target setting. Collaboration (or cooperation) among business entities is an important element of business strategy and tactics. Considering that the strategy and tactics of collaboration among business entities are plans and methods used to achieve common goals and objectives, it enables business entities to work on shared goals, resource plans, and projects to achieve mutual benefit. It is the strategy and tactics of collaboration that allow its participants to form clusters and other forms of alliances and achieve a synergistic effect, where collaborative work and resource exchange lead to mutual benefits that exceed the individual achievements of each business entity. Collaboration allows business entities to access additional resources that can be crucial for development, including finances, technology, infrastructure, and talented personnel. The synergistic effects synthesized by this phenomenon can manifest themselves in increased competitiveness of business entities, the development of their innovation, the reduction of operational risks, and other areas. The above provisions emphasize the overall significance of research on the strategy and tactics of collaboration among business entities.

Analysis of research and publications. Research on collaboration issues among business entities is an important field in both scientific research and business practice. The works of notable researchers such as Magomedova A.M., Krykhivska N.O., Pylypenko A.A., Voloshina-Siidei V., Yevseeva O., Maslyhan O., Syrtseva S., Nesterenko O., and Harkusha S. have contributed to uncovering various aspects of collaboration and identifying key questions related to the formation of collaboration strategy and tactics. For example, research by Voloshina-Siidei V., Yevseeva O., Maslyhan O., Syrtseva S., Nesterenko O., and Harkusha S. highlights that collaboration among business entities is indeed a diverse phenomenon. Researchers propose various approaches to implementing collaboration, including strategic partnerships, research or development partnerships, joint production activities, logistics or supply chains, commercial alliances, and other forms. The outlined research has also been instrumental in identifying key aspects of forming strategy and tactics for collaboration, such as defining the purpose and objectives of cooperation, resource allocation, responsibility distribution, result analysis, and strategy adjustment based on learning and experience. Indeed, the existing research today has generated a wealth of information that allows for a deeper understanding of the essence and complexities of forming the strategy and tactics of collaboration among business entities. However, currently, researchers have left unaddressed questions regarding the identification of classical elements of collaboration strategy and tactics

among business entities. Furthermore, the conditions of collaboration that enable participants in joint activities to achieve maximum mutual benefit and synergistic effects have not been defined.

The wording of the purposes of article (problem).

The purpose of the article is to identify the characteristics of forming the strategy and tactics of collaboration among business entities through clustering and other forms of joint activities.

The paper main body with full reasoning of academic results. Within the research, attention is drawn to the fact that collaboration among business entities (from French "collaboration," meaning "cooperation") can take various forms depending on the purpose of cooperation, the scope, and the nature of the interaction between participants (for example, clusters and technology parks, commercial alliances and consortia, joint production activities, and others).

In any case, the essential elements of collaboration include the strategy and tactics of collaboration among business entities, which must be aimed at uniting business entities around a common plan of action and methods to achieve shared goals and objectives. Analysis of the scientific literature reveals the fact that there are established classical elements of collaboration strategy and tactics, which include tactics [1; 3; 6]:

- The circle of collaboration participants.
- The format of goals and objectives.
- The format of strategy.
- The format of tactical actions.
- The format of resource allocation and responsibilities.
- The format of monitoring and evaluation.
- The format of communication and interaction.
- The format of analysis and correction of collaboration strategy.

Each of the outlined elements, while having a common essence, takes on individual content that depends on the form of collaboration. In particular:

Element 1 – Circle of Collaboration Participants. This element determines the collaboration participants. Choosing the right partners is critically important as it defines the success or failure of the collaborative project. Entities included in the collaboration should not only have strategic alignment and financial stability but also meet criteria of mutual trust, reliability, resource capability, competence, and responsibility (see Figure 1).

The right format of the circle of participants is the first and one of the most important steps in creating a successful collaboration strategy, as it determines the ability to achieve common goals and obtain a synergistic effect from cooperation.

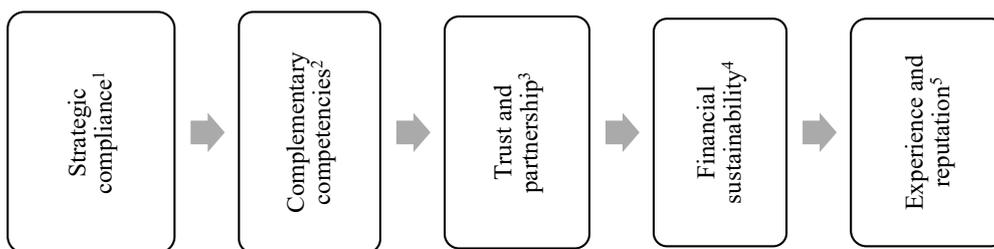


Figure 1. Criteria for selecting the circle of collaboration participants, who can be participants in the collaboration

Note:

1. Partners should have similar strategic goals and values to work together on achieving common objectives.
2. Selecting partners who possess unique competencies or resources necessary for achieving the goals can enhance the effectiveness of collaboration.
3. Participants must have mutual trust and a willingness to work as a team, jointly developing and implementing plans.
4. Partners should have financial stability to fulfill their obligations within the collaboration.
5. Partners should have the necessary experience and reputation to help reduce risks and increase confidence in mutual success.

Source: formed based on [1–2]

Element 2 – Format of Goals and Objectives. This element specifies a list of specific performance indicators and tasks that should be achieved through collaboration. The performance indicators and tasks serve as a guide for all collaboration participants and determine the results they collectively strive to achieve. These goals need to be not only specific but also meet the criteria of being measurable, achievable, realistic, and time-bound (SMART criteria). Adherence to these criteria should ensure a clear understanding and alignment of actions.

Element 3 – Strategy Format. This element defines the content of the plan (it outlines how the objectives of

collaboration among business entities will be achieved at a strategic level). Essentially, this element should specify the pathways to achieve the set tasks and determine how business entities will collectively act based on the following components (see Figure 2): vision and mission of collaboration; situation analysis; strategic goals and priorities; description of strategy and tactics; assessment of resources and budget; determination of the format of goal implementation schedules and progress monitoring; description of risks and countermeasures; determination of responsibility format and roles of the implementers [1; 3].



Figure 2. Components that define the content of the plan, which outlines how the objectives of collaboration among business entities will be achieved at a strategic level

Note:

1. Defining the shared purpose of the business entities united in collaboration and the significance they are intended to have in the market environment.
2. Examining internal and external factors that can influence the achievement of objectives.
3. Specific strategic objectives that the collaboration aims to achieve at the strategic level and determining their priority.
4. Describing the strategic directions and tactical approaches that will be used to achieve the objectives.
5. Assessing the resources required for strategy implementation and the budget formation specifics among different components of the strategy.
6. Defining the format of the timeline for executing the strategy, including monitoring and progress tracking.
7. Identifying potential risks and formats of risk management measures.
8. Determining which business entities or teams are responsible for executing specific tasks and components of the strategy.

Source: formed based on [1; 3]

The right format of the strategy serves as a map that helps business entities navigate the shared direction of development and the achievement of common goals. It makes the collaboration strategy more systematic and manageable, aiding in its successful implementation.

Element 4 – Format of Tactics. The selection of tactics is an essential part of business entities' collaboration and involves developing specific methods and actions for implementing the strategy at the practical level. Tactics determine how business entities will execute strategic plans and achieve goals based on the following components (see Figure 3): formulation of specific tasks; selection of methods and tools; consideration of resources and budget; development of a schedule and action plan; monitoring and evaluation; communication and collaboration; analysis of results and improvements [4–6].

The selection of effective collaboration tactics and their successful implementation play a crucial role in achieving the common goals of its participants and ensuring their mutual benefit.

Element 5 – Resource Allocation and Responsibility Format. This involves defining the list of resources (financial, human, technical, etc.) that will be provided to each party, as well as the duties and responsibilities related to the distribution of resources assigned to each partner, which is an important part of the effectiveness of business collaboration. In this regard, several key aspects ensure the effectiveness of the resource allocation and responsibility format: proper identification of resources (which should be ensured through the joint identification of all resources that may be necessary for the implementation of the collaboration strategy); assessment of resource availability (including determining the list of resources available to collaboration participants and how well they align with collaboration needs); resource allocation (based

on how resources will be distributed among collaboration participants and under what conditions); delineation of duties and responsibilities assigned to each collaboration participant. The resource allocation and responsibility format should be fair and consider the interests of all collaboration participants.

Element 6 – Control and Evaluation Format. An important part of the effectiveness of collaboration between business entities is the establishment of a control system that allows tracking the progress of task execution and the strategy as well as evaluating the results of cooperation. In this regard, several key aspects that ensure the effectiveness of the control and evaluation format for task and strategy execution can be highlighted, including: defining key performance indicators; determining components of the data collection and reporting system (including necessary data and report generation directions); responsibility for control and reporting (including establishing a list of responsible individuals or teams responsible for data collection, analysis, and report preparation); defining specific methods for data collection and interpretation; open feedback between collaboration participants and the control and evaluation process; regular reporting on progress and results of control and evaluation. The control and evaluation format helps ensure that collaboration remains effective and contributes to the achievement of strategic goals. It allows for timely responses to changes in the environment and helps avoid potential issues.

Element 7 – Communication and Interaction Format. A crucial part of the effectiveness of collaboration between business entities is the standardization of communication mechanisms between partners and means of interaction for efficient teamwork. Several key aspects ensure the effectiveness of interaction between partners for successful cooperation, including (Figure 4): defining communication

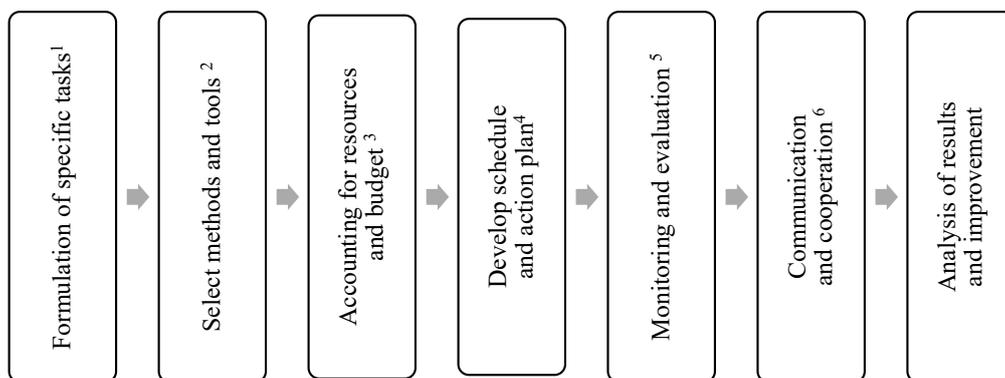


Figure 3. The components that define the content of tactics within the collaboration of business entities

Note:

1. Description of specific tasks and challenges that need to be addressed to achieve strategic goals.
2. Determination of methods and tools that can be used to solve the tasks (marketing campaigns, market research, new product development, technological innovations, training and staff development, optimization of production processes, and many others).
3. Identification of resource needs that are realistic and consider the financial capabilities of collaboration participants.
4. Timetable and action plan for implementing selected tactics.
5. Format for a monitoring and evaluation system to track progress and make timely adjustments to tactics if necessary.
6. Format for open communication and collaboration among all collaboration participants (in forms such as regular meetings, information, and experience exchange to achieve better results).
7. Format for analyzing results and determining the status of individual tasks' completion.

Source: formed based on [4–6]

methods; establishing an information exchange system (which includes data sharing, reporting, collaborative tools, and other instruments); developing communication and interaction rules; ensuring access to information; fostering a communication culture; managing feedback; using collaborative tools [4; 6].

The format of communication and interaction is an important component of business entity collaboration, as it helps ensure effective teamwork, prevents misunderstandings, and contributes to achieving common goals and objectives.

Element 8 – Format for analyzing and correcting the strategy and tactics of collaboration. For the effectiveness of business entity collaboration, continuous analysis of results and readiness to adjust the strategy and tactics when necessary are crucial. In this regard, several key aspects ensure the effectiveness of the collaboration strategy and tactics, including: monitoring and tracking progress (having a monitoring and progress tracking system for the execution of the strategy and tactics), the ability to identify the reasons for changes (if the results differ from expectations, there should be mechanisms for identifying the reasons for such changes), effective correction of the strategy and tactics (which may involve changes in action plans, resources, or priorities).

Considering the provided principles, the overall specificity of collaboration strategy and tactics determines the synergistic effect (a state in which each business entity benefits mutually). This leads to an overall increase in the region's attractiveness to tourists and an increase in the income of all collaboration participants.

So, for example, if we imagine that in the village of Kolochava in the Zakarpattia region, there are several

business entities involved in tourism (including hotels, restaurants, transportation companies, travel agencies, etc.), and each of them has its specific resources and capabilities, it's evident that such entities face competition and risks.

However, the collaboration of such entities within the Kolochava mini cluster in 2020, as well as the strategy and tactics of this collaboration developed during this period, should enhance their competitiveness by the overall specifics outlined in Figure 5. Under such an approach, each business entity receives mutual benefits. The outcome of the outlined collaboration should result in a synergistic effect characterized by a set of features [2; 5–6]:

1. Hotels and guesthouses receive more guests thanks to recommendations from restaurants and other businesses. This became possible through a joint advertising campaign and package offers for tourists, which include accommodation in hotels and dining at restaurants.

2. Restaurants and cafes increase their revenue due to tourists who come for well-known hotels. Collaboration between restaurants, cafes, and hotels involves recommendations and special offers for guests.

3. Transportation companies and private carriers provide convenient and reliable infrastructure for tourists, enhancing the overall attractiveness of the region. This includes transfers, village, and surrounding area tours (including to the Line of Arpad), and transportation services that make the trip more comfortable for tourists.

4. Tourists receive higher-quality services and incentives for returning to the region. This contributes to the satisfaction of tourists, many of whom become repeat visitors to the village.

Indeed, in the case of Kolochava village, the classic elements of strategy and tactics align with the collaboration

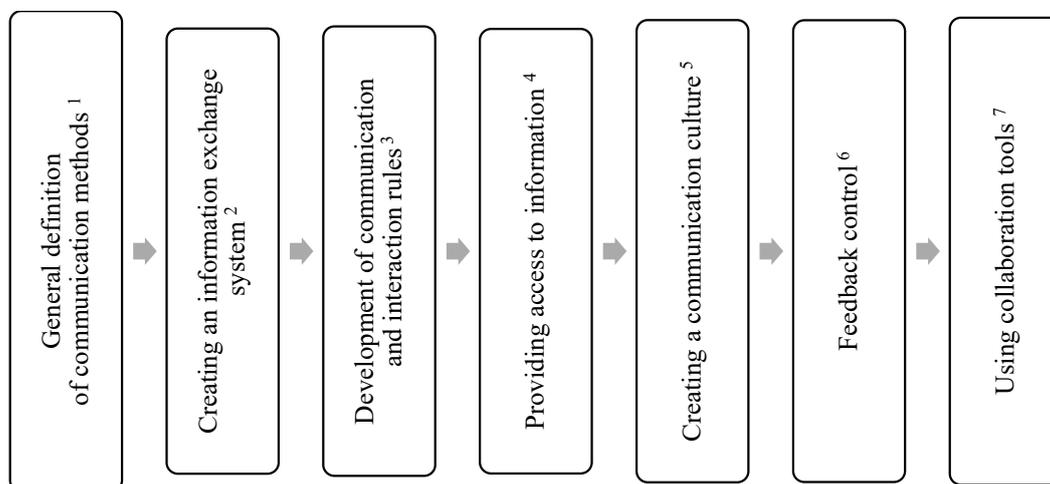


Figure 4. Components that ensure effective interaction between partners to ensure effective collaboration

Note:

1. Defining how partners will communicate with each other.
2. Developing a system for exchanging crucial information among partners. This includes data sharing, reports, collaborative tools, and other instruments.
3. Establishing rules and procedures for communication and interaction between partners.
4. Making information accessible to all collaboration participants in a convenient manner.
5. Creating a communication culture that promotes openness, collaboration, and mutual understanding among partners.
6. Ensuring an effective feedback collection system from collaboration participants.
7. Utilizing tools such as dedicated platforms for information exchange, project managers, collaborative document-sharing tools, and more.

Source: formed based on [4; 6]

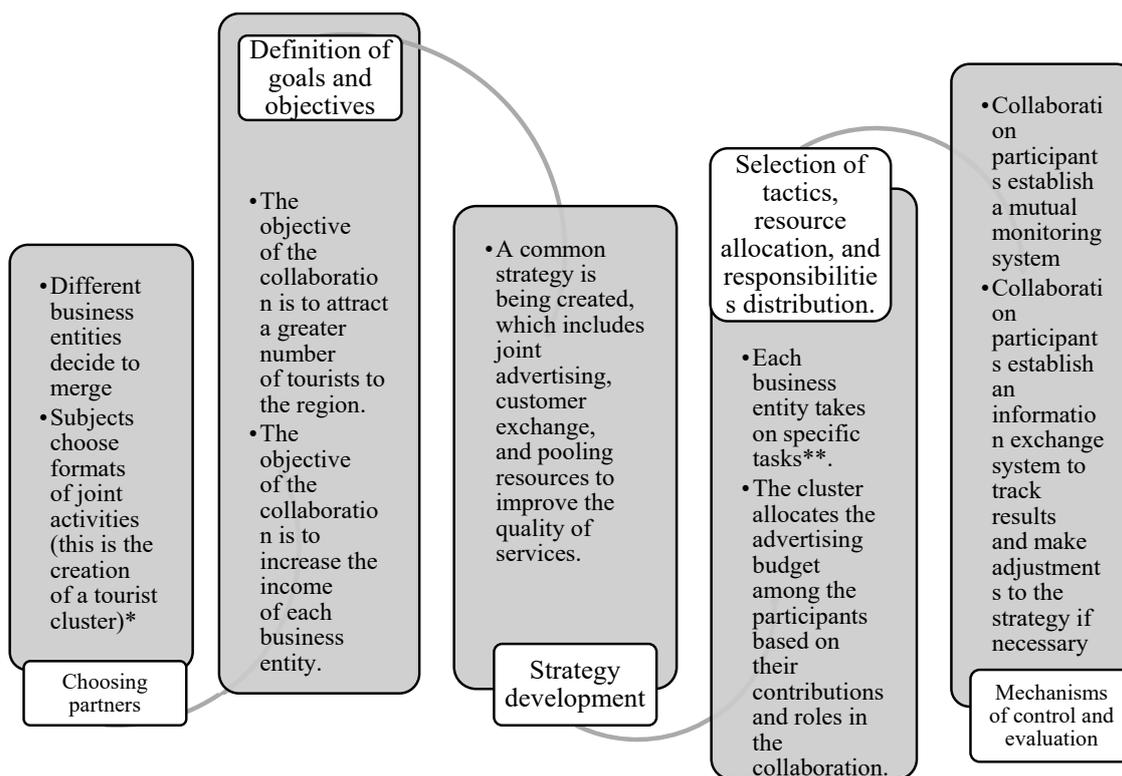


Figure 5. General specifics of collaboration strategy and tactics that determine the synergistic effect

Note

*The tourist cluster includes representatives from hotels and guesthouses, restaurants and cafes, transportation companies, and other sectors.

**Hotels offer special deals for restaurant guests, and vice versa. Transportation companies focus on convenient transfers for tourists.

Source: formed based on [2; 5–6]

form [2]. Collaboration and the creation of a tourist mini cluster have allowed for mutual benefits that surpass the results each business entity could achieve independently. For example, the average annual income of restaurants and cafes before their collaboration (before 2020) in the Kolochava mini cluster ranged from \$3,700 to \$5,000 per year. However, after collaboration, it increased from \$7,000 to \$13,400 per year. The average annual income of hotels and guesthouses before their collaboration was between \$3,000 and \$4,200 per year. After collaboration, it increased from \$6,000 to \$11,100 per year. The average annual income of local transport companies and private carriers before their collaboration was \$4,300 per year. However, after collaboration, it increased from \$12,000 to \$13,000 per year. Therefore, the better the classical elements of strategy and tactics align with the collaboration format, the higher the mutual benefit and synergy achieved.

Conclusions. Based on the study of the features of forming the strategy and tactics of business collaboration, especially collaboration in the form of clusters and other joint activities, several important conclusions can be drawn:

1. While business collaboration among entities can take various forms, ranging from creating clusters and technology parks to strategic partnerships and commercial alliances, the format of the strategy and tactics of business

collaboration remains relatively constant (with its inherent internal elements remaining unchanged).

2. There are classical elements of business collaboration strategy and tactics, which include: the circle of collaboration participants, the format of goals and objectives, the format of strategy, the format of action tactics, the format of resource allocation and responsibility, the format of control and evaluation, the format of communication and interaction, and the format of strategy and tactics analysis and correction. Each of these outlined elements, while sharing a common framework, takes on individual content depending on the form of collaboration.

3. The better the classical elements of strategy and tactics align with the form of collaboration, the higher the mutual benefit and synergy. It is under such conditions that collaboration allows participants to achieve maximum mutual benefit and a synergistic effect that surpasses individual achievements. For example, in clusters, various business entities can jointly utilize resources and knowledge for the collaborative development of innovative products.

The obtained research results allow for the exploration of the Ukrainian context of business entity collaboration in the direction of clustering and other forms of joint activity. This is because collaboration among business entities in the post-war period can become crucial for enhancing the competitiveness of Ukrainian enterprises and overall economic development.

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