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## Coopetition as a New Form of Managing the Tourist Offer on the Polish-German Border

### Abstract

The main purpose of this article is the presentation of the relationships of coopetition among the internal stakeholders of a cluster that could contribute to the development of tourism in its area of operation. This analysis is based on the case study of the Historical Tourism Cluster, which operates on the Polish-German border. This article is theoretical and conceptual in nature. In it, the following research methods have been used: a critical analysis of the literature, logical inference, and observation. Currently, clusters are considered to be among the organizations with promising perspectives for development. The EU has decided to support transnational clusters in its latest strategy (after 2020). In this case, the specialization of the cluster (historical tourism) could be an obstacle. However, this article indicates how the cluster described here could make use of the existing development opportunities.

**Keywords:** coopetition, tourism, Historical Tourism Cluster

**Słowa kluczowe:** kooperacja, turystyka, Klaster Turystyki Historycznej

## Introduction

Tourist regions are looking for opportunities to increase their attractiveness and competitiveness on both the domestic and the global tourism market. All entities whose activities are aimed at satisfying the demand of tourists in tourism areas participate in creating an offer on this market. Only comprehensive cooperation of entities representing supply on the tourism market, such as, local government units, tourism entrepreneurs and tourism industry organizations is the basis for creating a tourism area offer. The structure and quality of the offer in the administered area directly depends on them [Panasiuk 2015]. Important entities operating on the tourism market are, among others, tourism clusters that implement activities on various levels, often impossible to implement for a single entrepreneur. Thanks to cooperation they overcome difficulties more easily, stimulating material growth and increasing tourist traffic. Clusters can also play a significant role in activating the local community and in transforming a village into tourism areas, as well as increase competitiveness on the tourism market [Pałka-Łebek, Wrońska-Kiczor 2017]. Although the traditional perception of clusters is moving away from the perspective of the geographical proximity of entities creating the connection, in the tourism industry these aspects are crucial and they determine the possibilities of establishing and developing a cooperative connection. There are many publications on the functioning of clusters in tourism [Jackson, Murphy 2002; Michael 2008; Iordache et al. 2010; Kusa 2010; Malakauskaite, Navickas 2010; Rapacz et al. 2010; Estevão 2011; Erkus-Ozturk 2011; Shtonova 2011; Imali, Long 2012; Sikora 2012; Skowronek 2015; Bembenek 2017; Pałka-Łebek, Wrońska-Kiczor 2017]. They often emphasize that the cluster influences the competitive advantage of destinations through various partnerships and a properly functioning cluster should increase the competitiveness of destinations and stimulate tourist traffic in its area [Dębski 2014: 55]. In science, we are dealing with a change in the competition paradigm – the traditional, based solely on competition, is displaced by the concept of competition based on cooperation. The best tools to implement it are cluster structures, in which the competition of individual entities is as important as cooperation, because only on the path of well-understood competition and competitiveness one can become better. Competition and cooperation in clusters bring positive outcomes for entities operating within their structures [Stanienda 2012: 182]. Therefore, a characteristic feature of clusters is the combination of two opposites – competition and cooperation, which is referred to as co-competition [Cygler 2013].

The aim of the article is to present the relationships of co-competition among the internal stakeholders of the cluster that can contribute to the development of tourism in its area of operation. The article has a theoretical and conceptual character. In the first part the critical analysis of the literature concerned with the co-competition

between the members of the cluster is presented. The second part presents the analysis of research, carried out by case study method, of the Historical Tourism Cluster operating on the Polish-German border.

A case study is a qualitative method used to find a solution to an exploratory or explanatory problem. It is used when it is not possible to apply quantitative methods, in particular when the aim is to understand the conditions and causes of the occurrence of a given phenomenon. In the subject literature [Dogan, Pelassy 1990; Diamond 1996; Wójcik 2013], this method is described as: “empirical inference that concerns a contemporary phenomenon in its natural context, especially when the boundary between a case and its context cannot be clearly defined” [Diamond 1996 after: Wójcik 2013].

The following research questions are the focus of this paper:

1. What conditions must be met to enable cooperation (coopetition) of entities, usually strongly competing with one another in the tourism industry?
2. What factors determine the success of coopetition within the cluster operating in the tourism industry on the Polish-German border?

## The essence and meaning of coopetition

Based on domestic and foreign scientific achievements, which relate to cooperation between enterprises, it can be stated that in the conditions of globalization and increasing competitiveness, cooperation enables enterprises to mobilize inputs and information, which should contribute to the efficiency of their activities. Independent business entities compete with one another, but despite their natural tendency to compete for survival and development, numerous forms of their cooperation can also be observed. Inter-organizational relations are established and maintained with various partners, also with direct and indirect competitors [Klimas, Czakon 2018: 474–475], which is referred to as coopetition [Czakon 2009: 11–14].

The concept of coopetition appeared as a business practice in 1993 at the Novell computer company run by Raymond Noorda. It was then popularized by Adam Brandenburger and Barry Nalebuff, who in their analysis of coopetition drew attention to the game theory of John von Neumann and Oskar Morgenstern, which analyzes the relationship between competition and cooperation [Jankowska 2012: 55].

Joanna Cygler [2007: 64] proposes that coopetition should be defined as “a system of streams of simultaneous and interdependent relations of competition and cooperation between competitors maintaining their organizational separateness. Coopetitive relationships are created to achieve specific strategic goals in a given time horizon and their consequences have a significant impact on the strategy of the

parties involved.” At the same time, the author gives a set of coopeitition features, which include: the simultaneous occurrence of competition and cooperation, the separation of the occurrence of competition and cooperation, comprehensiveness, interdependence, dynamism, long-term relationship, formality or its lack, open character [Koszel, Bartkowiak 2017: 24]. An attempt to determine the characteristics of coopeitition was also made by Mariusz Rogalski [2011: 17–18]. The author pointed to six features determining the essence of coopeitition: the simultaneous occurrence of competition and cooperation, mutual benefit, complexity, dynamics, managerial challenge and impact on the change of the sector. The bibliometric study carried out by the author showed that in all analysed papers always two features are included: the simultaneous occurrence of cooperation and competition and mutual benefits, which are mentioned in all of the publications examined by the author. Based on this, coopeitition can be defined as a phenomenon of simultaneous cooperation and competition that brings mutual benefits to partners involved in this relationship [Bengtsson, Kock 2000; Fjeldstad et al. 2004; Dagnino et al. 2008; Osarenkhoe 2010: 343; Czakon 2013; Zakrzewska-Bielawska 2013; Hanachi, Coleno 2016; Simon, Tellier 2020]. It is treated as a kind of phenomenon that allows enterprises (mutual rivals) to mutually benefit from their cooperative relationships, while remaining competitive. In addition, achieving these benefits would be difficult or even impossible if the organizations carried out their activities individually [Romaniuk 2016: 509].

Magdalena Gorzelany-Dziadkowiec [2018: 171] lists the benefits and risks of coopeitition. The first of these relate primarily to: mutual learning and stimulating innovation, improving and creating new technological solutions, reducing the cost of research and development, reducing transaction costs, achieving the benefits of specialization (synergy), increasing company value, access to resources, strengthening the company’s position towards competitors not covered by the coopeitition agreement, fuller use of market opportunities, extension of the scale of operations and, finally, through access to new markets. However, the threats often include: the risk of leaking knowledge and know-how from an enterprise, which may result in a loss of control over technology, opportunistic behavior of coopeititors, conflicts between competitors, fear of loss of organizational independence, low efficiency of jointly implemented processes and goals, weakening of market position and company image.

The coopeitition strategy is being analysed at various levels. There is a micro level (the coopeititors are then internal units in the company, e.g. functional departments, strategic business units, employees), the meso level (the coopeititors are enterprises in industries, entities in clusters), the macro level (the coopeititors are clusters, industries, sectors of the economy) and the global level (coopeititors are national economies, integration groups) [Jankowska 2012: 59; Zakrzewska-Bielawska 2013; Dobrowolska 2015].

Coopetition research is also carried out in various economic sectors. Barbara Jankowska [2012] based on research conducted in Poland, Denmark and Japan presented the implications of coopetition for international competitiveness, innovation and internationalization of enterprises. However, the largest exploration is in the services sector, especially in the information and communication subsectors, as well as healthcare, social assistance and tourism [Lipianin-Zontek et al. 2010; Klemens, Derlukiewicz 2014; Kolarska-Kardela 2014; Barczak 2015; Panasiuk 2015; Stankiewicz, Lewicki 2015; Barczak, Grzeszczak 2016; Sidorkiewicz 2018].

### Cluster as an example of cooperation in tourism

The specificity of the tourist product offered by the area requires the existence of not only organizations specializing in the provision of various tourist services, but also their cooperation [Barczak, Grzeszczak 2016: 33]. According to Marta Derek [2008: 68], from the point of view of tourism, the competitiveness of the region means the ability to create and make such an offer that would distinguish a given region from others and as a result would attract tourists and increase the socio-economic benefits resulting from the development of tourism. In the region, or in the tourist town, there are many entities classified as part of the so-called direct and indirect tourism economy, that work together in various forms. Originally, one of the most commonly used forms of cooperation in this field was the creation of inter-municipal associations and, later, of regional and local tourist organizations. Currently, enterprises are increasingly operating on the basis of network cooperation – for example, striving to reduce transaction costs [Rapacz et al. 2010: 415–416] – which may take the form of cluster structures. Entrepreneurs from the tourism industry have been observing for a long time that by joining forces and offering better and more diverse service packages, you can attract more tourists, which is advantageous for all members of the structure and the location itself. One could even say that the sphere of tourism is destined to benefit from functioning in a networked environment [Klemens, Derlukiewicz 2014: 22].

The starting point for cooperation of entities in tourism is the high level of tourist attractiveness of the area. The emergence of tourist regions depends upon the presence of particular factors: natural (e.g. surface waters, forest cover, terrain, landscape, climate), anthropogenic (buildings and historic infrastructure), cultural (tradition and folklore, religion, museums, events) and social (way of life of residents and the local community). Their significant number favors the development and sustainability of cluster initiatives. In addition to tourist attractiveness, the cluster's functioning and development also require: infrastructure, service providers, suppliers, a business environment, and public institutions that can actively take part in the cluster's activities, participating in both its costs and benefits [Skowronek 2015: 132].

## The Historical Tourism Cluster and its key success factors

The aim of the paper is to present cooperation relationships among internal stakeholders on the example of the Historical Tourism Cluster. The method of achieving this goal is a case study, recognized as one of the basic methods of qualitative research and consisting in studying one or more objects (e.g. organizations, events, phenomena) of high internal complexity in a situation of many relationships and relations with the environment. Thus, it provides an in-depth analysis of a specific phenomenon [Wójcik 2013].

The Historical Tourism Cluster was established in November 2019 in Krosno Odrzańskie. It is a joint initiative of the Association of Municipalities of the Republic of Poland Euroregion "Sprewa-Nysa-Bóbr", Lubuska Employers' Organization in Gorzów Wielkopolski, Business and Innovation Center in Frankfurt (Oder) and Innovation and Technology Center in Forst, undertaken as part of the project entitled: "EuRegioNet – Internationalization of the Network and Clusters", in close cooperation with the authorities of Krosno Odrzańskie. The area covered by the initiative is mainly the Lubuskie Voivodship and the Federal State of Brandenburg. The cluster is currently at an early stage of development, which is referred to as the "embryonic stage". At the current stage of the cluster's development, the legal and organizational foundations of its activity are shaped, priority directions and areas of operation are set, and decisions regarding the scope and form of activity are made. This is an example of a cross-border cluster starting its activity on the Polish-German border, which is both an advantage that distinguishes it from other similar initiatives as well as a considerable challenge. The location of the cluster at the junction of two cultures provides an opportunity for faster development of tourism in regions located on both sides of the border, due to the historical conditions of these lands. The spatial proximity of Polish and German culture also gives a chance to accept multiculturalism and the complex socio-cultural reality of the borderland.

The cluster is currently at the stage of creating its offer. The main areas of its activity are concentrated around three complementary spheres: historic palaces and castles, fortifications, history and traditions of winemaking. The cluster can design its strategic goals and activities separately for each of the indicated areas, it can also combine these activities within all of them or in the arrangement of a given two. This is important for the further development of the Cluster, the design of its mission and vision, as well as the main strategic goals. These areas will interpenetrate each other in the entire activity of the cluster.

The goal of the Historical Tourism Cluster is to support activities aimed at creating a network of entities operating on the Polish-German border in the broadly understood tourist and historical industry as well as to promote the tourist potential and historical heritage of the region through [Cheba, Bąk 2020]:

1. Conducting activities supporting the development and promotion of enterprises operating in the historical tourism industry.
2. Creating favorable conditions for conducting business activities.
3. Taking actions aimed at obtaining external financial resources for the cluster.
4. Taking actions aimed at lobbying the cluster.
5. Implementation of joint projects aimed at promoting the cluster and its members.
6. Building the cluster brand as an entity supporting the development of historical tourism on the Polish-German border.
7. Development of the cluster brand (e.g. promotion, public relations) as areas focused on supporting historical tourism.
8. Increasing the position of the cluster as a partner towards the environment (e.g. towards entities operating in the tourism industry within the area of the cluster's activity and outside it).
9. Supporting the development of cross-border historical tourism by creating a cooperation network of enterprises, local government, administration, universities, business environment institutions, non-governmental organizations, cultural institutions and natural persons.

Currently the cluster, apart from the local government sector, mainly comprises members of the Polish-German tourism industry, who have so far competed for clients. While creating the cluster, being aware of the complexity of the situation, attempts were made to identify areas that could provide a field for joint activities within the cluster.

Table 1 presents the key success factors of the Historical Tourism Cluster, which are closely related to the phenomenon of coopetition due to simultaneous cooperation and competition between representatives of the Cluster. Initiating a network of economic connections, creating integrated tourist products by using the potential of border towns and communities is a solution that fits in with the global trends on the tourism market. In addition, the cooperation between business and scientific entities as well as public authorities within the cluster helps in raising competences and skills in the implementation of the set tasks, which contributes to the improvement of competitiveness and innovation of operating entities and common financing of various projects has a positive effect not only on the development of enterprises but also on cooperating regions together.

It is worth paying attention to the compliance of the cluster's specialization (historical tourism) with the so-called smart specializations. In the case of the Lubuskie Voivodship, it is the specialization in health and quality of life, which is indicated as one of the important development directions of the Lubuskie Voivodship, also in the sphere of tourism. For Brandenburg, this is specialization explicitly referred to as tourism, under which development areas such as sustainable tourism, ICT for tourism, climate-friendly mobility or combining regional products with tourist

Table 1. Key success factors of the Historical Tourism Cluster as an example of coopetition

In the sphere of an offer	In the sphere of servicing internal and external clients	In the sphere of resources	In the sphere of specialization	In the sphere of influence on the development of regions
Universal specialization with which many entities operating in the region are identified.	The potential of institutional partners that is a guarantee for financing the ongoing operations of the Cluster.	Access to the potential and knowledge of institutional entities and industry organizations that are members of the Cluster.	Easier access to financing due to the compliance of the Cluster's specialization with the development directions of the region.	The development of supra-regional cooperation thanks to the functioning of the Cluster on both sides of the border.

Source: Cheba, Bąk [2020].

services are listed. This is an important aspect of the cluster's activity when applying for funds from the European Union. For these types of projects, compliance with smart specializations allows for additional points at the assessment stage. Cross-border cooperation within cluster structures is also indicated as one of the priority directions of EU development. The EU cohesion policy after 2020 will focus on five main priorities, which have been identified as giving the opportunity for the best results after 2020. The five main objectives guiding the EU's investments in 2021–2027 are [European Commission]:

- a smarter Europe through innovation, digitization, economic transformation and support for small and medium-sized enterprises;
- a more environmentally friendly, zero-emission Europe implementing the Paris Agreement and investing in the transformation of the energy sector, renewable energy sources and the fight against climate change;
- a better connected Europe with strategic transport infrastructure and digital networks;
- Europe with a stronger social dimension, implementing the European Pillar of Social Rights and investing in high-quality employment, education, skills, social integration and equal access to health care;
- Europe closer to its citizens by supporting bottom-up development strategies and sustainable urban development throughout the EU.

The most important directions of regional policy development after 2020 from the point of view of the cluster's activities include:

1. A better targeted approach to regional development

Cohesion policy will continue to invest in all regions and there will continue to be three categories of regions (less developed; in transition; more developed). The method of allocating funds will still largely be based on GDP per capita results. In addition, new criteria (youth unemployment, low level of education, climate change and activities related to the reception and integration of migrants) will be taken into account to better reflect the situation on the ground. The outermost regions will

continue to benefit from specific EU support. Under the cohesion policy, bottom-up development strategies will be supported and the position of local authorities in managing funds will be strengthened.

## 2. Interreg: eliminating cross-border obstacles and supporting innovation projects

Interregional and cross-border cooperation will be facilitated by the fact that regions will be able to use part of their allocated funds to finance projects across Europe together with other regions. The new generation of cross-border and interregional cooperation programs (“Interreg”) will help Member States to remove cross-border obstacles and create shared services. The commission proposes to introduce a new instrument for border regions and countries wishing to harmonize their legal framework – the European cross-border mechanism. Regions with resources in the field of “smart specialization” will receive more support in creating pan-European clusters. Due to the fact that these are areas outside the main area of the cluster functioning (e.g. large data set technologies, circular economy, advanced production technologies or cybersecurity), the cluster should seek opportunities to implement supporting activities, for example, in the field of digitization of the region’s resources in areas of smart specialization.

The identified directions of regional policy development give the members of the Cluster a chance to search for such areas of activity which, despite a very similar profile and specialization of entities, will allow for joint implementation of projects. Most of the Cluster members do not currently have sufficient potential to apply for EU funds on their own. Functioning in the structure of the cluster with strong support of the local government will allow cluster members to participate in projects of this type. As a rule, various forms of coopetition are a direct effect of EU projects aimed at clusters; starting from developing a cluster strategy representing the expectations of various stakeholders, through preparing a joint offer, to the implementation of joint activities. The following part of the article focuses on identifying potential conditions and circumstances conducive to the further development of the cluster.

## Discussion and conclusions

The Lubuskie Voivodeship due to its natural values is indicated as one of the regions in Poland in which tourism has a great chance to stimulate the development of the entire region. It is not difficult to notice, however, that despite the region’s obvious potential (high forest cover, access to many lakes, etc.), the tourist development of the region is slow. The main reason is the transit nature of the region and the insufficient base of available tourist facilities. The development of tourism is an important development direction indicated by representatives

of local authorities operating in the region. The creation of the Historical Tourism Cluster is one example of an initiative whose goal is to develop tourism. It was decided that this would be development focused on historical tourism on both sides of the Polish-German border. The European Commission also recognizes the need to support cluster development, which calls, among others, for further development of European cluster policy to connect and scale up regional clusters into pan-European world-class clusters, based on the principles of smart specialization to support the emergence of new value chains in Europe.

According to the opinion of the European Economic and Social Committee (EESC) published on August 20, 2019,

interregional, transnational cooperation based on pre-existing historical, socioeconomic and cultural links should be the necessary response to the challenges arising from the rapidly growing expansion of the European Union (EU), partly caused by the growing global competition and the resulting urgent need to expand the audited markets, both geographically and economically. Establishing an interconnected cross-border and cross-sectoral cooperation system based on multilevel governance and creating a strategic framework of thematic axes for funding institutions to implement well-targeted projects in the macro-region is of great importance [Opinia Europejskiego Komitetu Ekonomiczno-Społecznego 2019].

The Committee expects that these opinions will be important for policy makers when implementing macro-regional strategies and taking into account the opportunities arising from cross-border cross-sectoral cluster creation.

However, the obstacle to the Historical Tourism Cluster reaching for funds allocated for the development of European Union clusters may be the specialization of the created cluster. Currently, innovative projects are supported in the European Union, the cluster has fewer opportunities to raise funds in this respect. IT solutions can be a possible direction to explore in this respect, for example in the area related to the digitization of data sets, through development of IT applications enabling such activities associated with tourism as comprehensive planning of a stay in the region.

Effective cooperation carried out by entities representing the same area of activity (in this case of owners of tourist facilities located in the Lubuskie Voivodeship) is not an easy task. The solution can be cooperation under the so-called value chain and offering a comprehensive tourism product. Similar solutions already exist in other organizations of this type. Biomedical clusters specializing in the development of new active substances, cooperating within the cluster, offer potential recipients not only new treatment units, but also support in the form of activities aiding the introduction of a new product to the market. Another solution is establishing cooperation with clusters representing different industries, for example with medical and technology clusters operating in the Medical Valley Nurnberg

and Tuttlingen in Germany, Emilia-Romagna in Italy or Galway in Ireland. As the experience of other clusters shows, their way of formation and development is very different. In the case of the Historical Tourism Cluster, we are dealing with a bottom-down initiative initiated by an institutional sector. Due to the area of the cluster's activity, such a system of initiators of the cluster's establishment is very important for the durability of its further functioning and a large dispersion of various types of tourist attractions in the region. The strength of the cluster's initiators is their institutional potential, technical and organizational support, and the ability to implement activities related to coordinating the cluster's activities within the existing structures of the institutions that created it. This is an important starting point for clusters operating in areas considered to be niche, which need greater support at the start of their activity than industrial clusters.

Further effective and, above all, sustainable development of the cluster will require, among other things, undertaking activities in the scope of: increasing the cluster's resources (including: increasing the number of its members, increasing financial resources), initiating common processes in the cluster, and continuing cooperation with the environment, including cooperation with other clusters in Poland and abroad.

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