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With every new edition of the *Horizons* scientific journal, the academic public has become used to the expectation that it traces new pathways towards its further establishment in the international educational and scientific –research areas.

For the coming period, just as it did previously, *Horizons* will continue to respect the principles of scientific impartiality and editorial justness, and will be committed to stimulating the young researchers in particular, to select *Horizons* as a place to publish the results of their contemporary scientific and research work. This is also an opportunity for those, who through publishing their papers in international scientific journals such as *Horizons*, view their future carrier development in the realm of professorship and scientific-research profession.

The internationalization of our *Horizons* journal is not to be taken as the furthest accomplishment of our University publishing activity. Just as the scientific thought does not approve of limitations of exhaustive achievements, so is every newly registered success of the *Horizons* editions going to give rise to new “appetites” for further objectives to reach.

Last but not the least, we would like to express our sincere appreciation for the active part you all took in the process of designing, creating, final shaping and publishing the scientific journal. Finally, it is with your support that *Horizons* is on its way to attain its deserved, recognizable place where creative, innovative and intellectually autonomous scientific reflections and potentials will be granted affirmation, as well as an opportunity for a successful establishment in the global area of knowledge and science.

Sincerely,
Editorial Board

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**DEVELOPING DESTINATION COMPETITIVENESS: SMALL
TOURISM ENTERPRISES (STE) AS INNOVATION
DRIVERS⁶⁴**

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Abstract

Small tourism enterprises (STE) are particularly important for the destination competitiveness. In order to maintain or improve destination market position, STEs must be constantly innovative. Innovation is a key factor for improving SMEs performances, and indirectly for increasing destination competitiveness. Innovation is a multifaceted concept and it can be classified according to the object, the field, relevance and origin. As a result of innovation, STEs improve product quality, reduce production costs, increase the range of products, replace outdated products, improve their performances and thus enhance destination competitiveness. This paper examines the specific contributions to destination competitiveness of the innovative STEs, with some data reflecting the innovation activity by registered enterprises in the Republic of Macedonia.

Key words: Small tourism enterprises (STE), innovation, entrepreneurship, tourism destination

INTRODUCTION

As World Tourism Organization (WTO) points out ...”Today, the business volume of tourism equals or even surpasses that of oil exports, food products

⁶⁴ review scientific paper

or automobiles . Tourism has become one of the major players in international commerce , and represents at the same time one of the main income sources for many developing countries... ”. Tourism is one of the fastest growing, and world’s largest industry. Consider following tourism key facts: 9% of GDP– direct, indirect and induced impacts; 1 in 11 jobs is in tourism; US\$ 1.5 trillion in exports; 6% of the world’s exports; 30% of services exports (2015). Tourism growth has accelerated significant changes in the way tourism destinations compete for their share of the global travel market. Different tourism stakeholders try to understand destination competitiveness determinants, find the way to spur relationships and coordination between actors’ activities in a destination, and stimulate tourism led destination development. From the perspectives of entrepreneurship, tourism destination is seen as a different context in which entrepreneurial opportunities can be identified, sized and commercialized into a consumable tourism product. These opportunities are then transformed into business innovations based on nature, culture, heritage, traditions, religions, and other tourism venture initiatives. A small tourism enterprise (STE) is able to cope with the constant market pressure if it realizes reliable, balanced and high-standard operation in its business. STE business innovation activities have been identified by different authors as the principal driver of destination competitiveness, as well as key factor for any business survival (Van Auken et al., 2008). STE business innovations enable STEs to bring new and / or improved products and services in the market and thus meet customers' needs better and fully, gain loyal customers, increase sales of products and services, substitute outdated products, increase income, improve market share, increase competitive advantage, conquer new market segments, improve performance, and positively affect the economic development of the destination in which STEs operate.

DESTINATION COMPETITIVENESS DEVELOPMENT

As tourism demand continues to mature, the need for understanding destination competitiveness ability will inevitably lead to competitive advantage factors developing. The concept of competition and competitive advantage of a tourism destination has been researched and studied across tourism and business disciplines as a part of growing interest in business competition generally (Teece, 2010). Competitiveness is a complex, multi-dimensional, multi-faceted, relative and very confusing concept. Since early 1980s until today, various authors, depending on the width and aspect of their research, offer different views on the competitiveness and continually expand their models for competitiveness. The competitiveness concept

according to Waheeduzzaman and Ryans (1996) involves different perspectives, namely, comparative advantage perspective, management and organization perspective, as well as socio-cultural perspective. O’Sullivan (2008) adds cost, quality, delivery dependability, flexibility and *innovation* as factors formulating such a competitive position. The World Competitiveness Report (2014-2015) survey, as well as Porters’ work on competition among firms (Porter, 1980, 1985) and among nations (Porter, 1990) provides a stepping stone in understanding the concept of competitive advantage. Porter’s “diamond” model (1990) emphasizes the inputs needed to compete in the industry, required level of home demand for the products/services, the context in which *innovative entrepreneurship* nourishes- enterprise creation, organization and management, and supporting and competitive industry structure- supplier and other related industries.

Based on previous notions, we can identify some of the factors that influence destination competitiveness. These are:

- *Infrastructure* group of factors provide foundation for a strong tourism sector, such as roads and communication network, accessibility, accommodation, facilitation, and STEs.
- *Attractive* group of factors represents destination appeal factors, such as physiography, culture, events, activities, ties, and human infrastructure
- *Constraints* group of factors which govern the potential of destination competitiveness, such as location, safety, and cost
- *Destination management* group of factors are shaping the destination competitive strength and marketability, such as marketing and promotion, tourism sector destination organization, strategic alliances, destination maintenance, market research, service productivity and uniqueness.

STEs fall under *infrastructure* group of factors. STEs are a foundation for a strong tourism sector at destination level. STEs are more flexible to the market changes, they help in creating diversified economic structure, build healthy *competition* environment, stimulate *innovation*, improve quality of the products and services, and foster entrepreneurship culture. As agents of economic development, STEs are cornerstone of the tourism destination economy. STEs play vital role in expanding overall economic development in a tourism destination. STEs are ideal mechanism for development of innovative tourism products and experiences.

INNOVATION CHALLENGES FOR TOURISM DESTINATION AT OPERATIONAL LEVEL

But, tourism fragmentation can be seen as a weakness, too. Tourism is mainly composed of STEs. In OECD countries, 60-90% of all companies in tourism sector employ less than nine employees (OECD, 2014). STEs are characterized with high labor intensity, and low levels of productivity (Aremu and Adeyemi, 2011). Low levels of productivity are affecting the competitiveness, and organization innovation ability. The loss of destination competitiveness can occur when innovation failure becomes widespread across the overall tourism sector. It is better to focus on destination innovation in early developmental phases, than to rebuild already declined destination.

The origin of the word “innovation” comes from the Latin words “innovatio” or “innovo.” Both words mean to “renew or to make something new”. The research shows that innovation is the key catalyst of destination growth, rather than capital investment (OECD, 2009). Innovation in the tourism destination can be observed at different levels: firm level, network level, public policy level. Schumpeter (1996) outlines the main areas of innovation as product innovation (new or significantly improved product), process innovation (new distribution method), market innovation (identifying new markets or new ways to serve target markets), and logistical innovation (supply chain improvements). According to Sundbo et al. (1998) tourism innovation means a change in business behavior, which is culture shift. The culture of innovation can be spurred by growing appropriate business attitude, building necessary supporting structures, and focusing state actions into welcoming the new ventures. Once the destination masters the relationship between its public tourism sector and organization innovativeness, destination competitiveness grows naturally. Innovative activity at a destination level can be improved by appropriate public sector decision-making and activity leadership. Cooperation between public sector policy-makers is fundamental to create innovative behavior in tourism. Public sector has an important role in leading innovation process by building tourism networks which will enhance the learning and dissemination of knowledge at destination level. This leads to the notion of a “learning” destination as a new concept in adding value to destination competitiveness. Private businesses view themselves in terms of competition, that’s why

public sector policy-makers can assist in facilitating tourism networks, and educating network agents about the collaborative benefits at a wider, destination level (Table 1).

Table 1: Developing destination competitiveness through tourism networks

Learning and Knowledge Sharing	Accelerated Business Activity	Destination Effects
Public sector initiatives dissemination	Public sector investment increase	Tourism purpose destination
Culture shift	Joint marketing	Tourist spending
STEs early stage support	Pooling STEs resources	retention
Understanding destination development context	Increased customer base through cooperation	STEs networking
Communication strengthening	Business continuum	

STEs INNOVATIVE CONTRIBUTIONS TO DESTINATION COMPETITIVENESS

Innovative STEs are defined as small and medium size tourism enterprises which create value through 'innovation,' or seek innovative activities continuously. Innovative STEs are those enterprises which play a leading role in creating jobs and add value by improving existing tourism products or services, or producing and distributing new ones. STEs have potential to drive destination growth and create quality jobs through continuous innovation activities. Due to the considerable importance of STEs in job creation at a destination level, policies and approaches to enhance STEs competitiveness have become an important part of public policy decision-making (Figure 1).

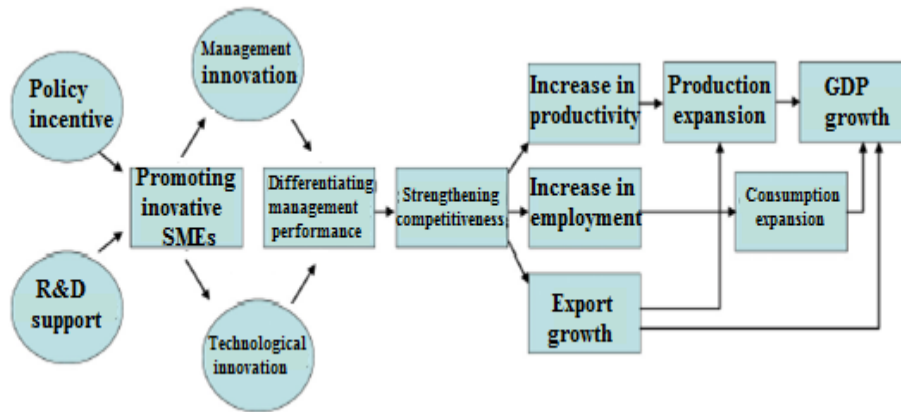


Figure 1: Destination competitiveness impacts of innovative SMEs
(Developed from Tiwari and Buse, 2007)

Various factors encourage an STE to innovate. These factors can be summarized as follows (O’Sullivan, 2008): emerging technologies; competitor actions; new ideas from customers, strategic partners, and employees; and emerging changes in the external environment (societal, political, industry trends and government support). STEs directly influence visitors’ experience thereby potentially gaining valuable correctives’ in the form of visitor feedback. Acting in a more informal manner and faced with fewer intra-firm hierarchy levels than large firms, STEs are better suited for innovations than their large counterparts. This opportunity for invention should enable STEs to develop products better suited to market niches and thus bring more success at a firm and destination level.

Particularly, with regard to STEs/destination level innovative entrepreneurship, following activities contributes to poorly developed destination competitiveness:

- Local supply of food and services in the hospitality sector creates innovative opportunities for numerous alternative suppliers, building competitive environment for excellence
- Establishing innovative linkages between STEs in a destination encourages inter-firm cooperation on a mutual self-interest in the success of the destination (sectoral associations, market alliances, management structures)
- Promoting learning activities and sharing innovative practices at industry meetings

- Focusing on innovative local and regional foods in product development enables STEs/destination to concentrate on their core competencies
- Receiving consultancy services and expertise from other destinations
- Informal and formal dissemination of acquired knowledge through tourism networking
- Government business assistance in the form of business incubators and facilitators for development of creative destination-wide innovative ideas, which needs to be implemented by private sector
- Establishing municipal incentives for innovations development
- Local authority engagement in stimulating STEs to cooperatively innovate through the process of building public-private network structure,etc

Despite the evident contributions to destination competitiveness, the high number of small firms in tourism industry leads to several problems and challenges. The tourism business is seasonal in nature, and staff turnover is very high, which makes difficult for owner-managers to invest in staff training. The nature of tourist product “assembled” by tourist consumption makes it difficult for entrepreneur to be concentrated and to recognize firm dependency on the competitiveness of the destination as a whole.

STEs AND INNOVATION IN THE REPUBLIC OF MACEDONIA

The term STE covers a wide range of definitions and measures varying from country to country and between the sources reporting STE statistics. Some of the commonly used criteria are the number of employees, total net assets, sales, investment level, and shareholders funds. Thus, depending on the criterion selected, the same firm can be classified as “small” under one criterion and as “medium” under another criterion.

European commission defines micro, small and medium-sized enterprises based on headcount as: micro- less than 10 persons employed, small- less than 50 persons employed, and medium-size- less than 250 persons employed. Same definition is applied by State Statistical Office, Republic of Macedonia (European Commission, 2003). Peterson et al. (1986) use both quantitative and qualitative measures in defining STEs. Quantitative measures such as the number of employees and the annual turnover are the most popular tools to define STEs. Storey (1994) considers STEs as enterprises with a relatively small share of their market, enterprises managed

by owners- without formalized management structure, and enterprises as self-sufficient businesses, not being part of a large group.

The following examples will illustrate the state of STEs innovation activity in Macedonia and their relevance for Macedonian economy.

Table 2 represents the total number of active enterprises and statistics for accommodation and food service businesses for 2014 in the Republic of Macedonia. It is obvious that micro, small and medium size enterprises (less than 249 employees) represent 94.0% of the total number of enterprises in 2013. On the other hand, micro -enterprises (1-9 employees) are representing 88.0% of the total number of enterprises in accommodation and food service sector. We found these numbers in correlation with OECD (2014) countries data where between 70% and 95% of all firms are micro-enterprises (firms with less than ten employees).

Table 3 gives overview of accommodation and food service sector in 2013, by number of employees, per business size. In 2013, 73.16% were employed in micro enterprises with less than 19 employees. Also, in 2013 accommodation and food service sector employment number represented 2.87% of the total employment in Macedonia⁶⁵.

According to data of the State Statistical Office of the Republic of Macedonia, only 42.8% of companies in Macedonia have implemented some kind of innovation in their work during the period from 2010 to 2012. The others 57.2% did not dare to do it. The highest percentage of the innovators is for large companies, or 75.8%, while the smallest percentage is for the small firms - only 39.9% (table 4).

The results are in line with Keller (2004) observations about barriers for STEs innovation activities: high transaction costs, lack of funds, lack of qualified personnel for setting social bond enabled networking, and high level of imitability of tourist innovations.

From the total number of innovative enterprises in the Republic of Macedonia, 24.7% have introduced innovation of products and processes, 46.4% have introduced organizational and marketing innovations, and only 18.2% have introduced a product and process as well as organizational and marketing innovation (table 5).

⁶⁵ Source: <http://makstat.stat.gov.mk/pxweb2007bazi/dialog/statfile18.asp>; Total employment number for 2013 is 678 838.

Macedonian tourism industry enterprise structure is micro and small. The number of registered active enterprises in Macedonia notes steady growth. Most of them belong to the category of small and medium enterprises. This category is particularly important for the economy and represents the main driver of the economic activity in the country. Seeing the fact that small and medium enterprises in the country in general and in the tourism sector especially employs most of the active working population, have the largest share in the realization of turnover and in the generating of value added, it can be concluded that these enterprises have great importance for the economy and for economic development of the Republic of Macedonia (Nikolovski, Dimoska, 2015).

Table 2: Macedonia, total number of active businesses, accommodation and food service sector total number of active businesses, and by number of persons employed in 2014

Sector of activity	Total	%	Enterprise size by number of employees					
			0 ⁶⁶	0-9	10-19	20-49	50-249	250 +
Total	70659	100.0	3972	60215	3092	1869	1305	206
Accommodation and food service	4493	6.4	67	3952	325	125	23	1

Source: _____ (2015): Business entities, Number of active business entities, 2014- News Release No: 6.1.15.14. State Statistical Office, Republic of Macedonia, p. 2;

Table 3: Employees by enterprise size classes, in accommodation and food service sector, 2013

Year	Enterprise size classes by number of employees					
	Total	0-9	10-19	20-49	50-249	250 +
2013	19479	10386	3865	3197	1747	284

Source: _____ (2015): Structural business statistics, 2013-final data- News Release No: 6.1.15.23. State Statistical Office, Republic of Macedonia, p. 4;

⁶⁶ Including business entities with unascertained number of persons employed

Table 4: Enterprises according to innovativeness, by sector and size

	All sectors	Innovators	Not Innovators
Total	4 818	2 060	2 758
Small	3 967	1 583	2 384
Medium	719	337	342
Large	132	100	32

Source: _____ (2014): Innovative business entities in the period 2010-2012- News Release No: 2.1.14.25., State Statistical Office, Republic of Macedonia

Table 5: Enterprises according to the type of innovation

	2010-2012		
	Innovators in product or process	Innovators in the organization or marketing	Product/process and organizational/marketing innovators
Total	509	956	374

Source: _____ (2014): Innovative business entities in the period 2010-2012- News Release No: 2.1.14.25., State Statistical Office, Republic of Macedonia

CONCLUSION

In order to enhance destination competitiveness, we must understand how entrepreneur shapes and remodel destination-based innovation systems by mobilizing tourism networks and focusing system dynamics towards commercialization of products and services. Cross-sectoral nature of the tourist industry requires building an innovative culture among tourism stakeholders as a long-term initiative, not as a quick fix by policy-makers. STEs in general tend to be imitators, not innovators. Thus, public sector intervention fosters change in the innovation culture. Looking at the destination level, innovation can still occur without state intervention, based on individual entrepreneur venture decisions to size the business

opportunities. But collaborative and cooperative innovation behavior between competitors at a destination level, will lead to flourishing clusters of products and experiences that raises destination competitiveness significantly.

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