

CLUSTER INNOVATION IN TOURISM INDUSTRY: A STUDY ON BANGLADESH

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Abstract

The concept of cluster is used in tourism industry as one of the most appealing ways intended to develop value and profitability in the competitive business arena. A number of countries are officially basing their economic development strategies on cluster theories. The present study mainly focuses on cluster innovation to harvest utmost profit through bringing innovation in tourism service delivery and also creating more value proposition in Bangladesh tourism industry. Though the country has plenty of natural attractions for the development of tourism industry, the absence of both proper planning to use all the natural incentives and also the implementation of cluster innovation concept has made the country deprived of becoming one of the leading tourism industries. This paper is an attempt to present prevailing scenarios of cluster innovation, the impact of tourism industry in Bangladesh and some way out to develop the present condition through implementation of a model of cluster innovation. Ensuring the development of infrastructure, collaborative efforts, networking among the actors of the tourism industry were suggested for harvesting utmost profit and to develop extra value proposition.

Keywords: Cluster, Innovation, Value proposition, Tourism

1. Introduction

The evolution of today's world is really a far cry from those of past. People are more concerned about the value what they are getting from products and services. In tourism industry it is a demand of time to bring innovation through cluster which will lead the tourism services into a new dimension. Bangladesh is a developing country of South Asian region. Geographically it has enormous scopes to become a competitive part of the world tourism. Plenty of natural supports or geographically favorable incentives for the development are present in Bangladesh for the development of tourism industry. But, it is a matter of sorrow and also a matter that is to be considered very intelligently that, after having such positive and potential incentives as well as elements like scenic beauty, hilly regions, mangrove forest and the world largest sea shore which can contribute to the development of the overall tourism industry in Bangladesh. Bangladesh is known as a hospitable country where various types of heritages and also scenic beauties exist from the ancient time. People of this country hold great tribute for their heritages and culture and they also like to enjoy to become host for the tourists and to dissipate the color of their culture to the world which is very positive sign for the attraction of the tourist. In this paper the pros and cons of developing, introducing, and implementing the cluster innovation concept have represented which are already exist in the developed countries' tourism sectors and are getting more advantages through the implementation of this concept.

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Some major findings are represented which are found from the insights of both secondary data collections as well as primary data analysis through case study analysis. There are numerous problems that are existed at present in the tourism industry of Bangladesh which are considered as impediments of development are tracked down. The potential benefits which can be achieved through cluster innovation are tried to display here. Several policy implications are suggested as recommendations to the development of overall tourism industry through using of both geo-cluster as well as collaborative & networked clustering initiatives in bringing newness through this paper.

2. Importance of the Study

Third World governments invariably justify the promotion of tourism as a driving force for economic development. According to the World Travel and Tourism Council (WTTC), travel and tourism presently employs approximately 231 million people and generates over 10.4% of the world's GDP. It is a complete reflection of the fact that tourism for third world country like Bangladesh can be one of the most potential sectors for earning foreign currency as well as the development of the domestic economy. Bangladesh has achieved 80th, 169th, 22th, 12th positions from absolute size, relative size (contribution to GDP), growth, long-term growth respectively in 2012 & 2013 among 184 countries of the world (WTTC Annual Research, 2013) which is a great reflection of remarkable contributions of tourism industry.

In the year 1991, the number of total tourist arrivals in Bangladesh was 1,13,242 which increased to 5,88,193 in 2012 with an average growth of 8.16% from 1991 to 2012 and the amount of foreign exchange earnings was Tk. 91.30 million in 1991-92 which rose to Tk. 8,475.65 million in 2012-13 with an average growth rate of 17% from 1991-92 to 2012-13 (Annual Report, BPC). This growth rate is also a remarkable sign for Bangladesh tourism industry. These are the figures when the cluster innovation is ideologically absent in the industry. Thus, it can be assumed that introducing, development, and implementation of cluster innovation into tourism industry of Bangladesh will help to move up amount of foreign exchange earnings and number of tourist arrivals positively and all the above positions can be easily surpasses when cluster innovation will be implemented. Cluster innovation in the tourism industry among the underlying parties like tour operators, hotel and motel owners, travel agencies, tourism corporations, tour intermediaries and other related parties can bring more exclusive value proposition to the overall service industry of tourism in a very competitive price with win-win profit situation as well as can delight consumers. This study consists that Bangladesh tourism industry has some natural favors which are mostly absent in other countries, but those countries tourism industries are getting developed through the development of some elements like infrastructure, networking, collaboration among the parties, and also bringing newness into the tourism service. Cluster innovation helps an industry to make all its resources concentrated mainly into in geographic regions and to create some combined efforts among the parties. This study representing overall scenarios of present clustering situation, major economic impacts of tourism industry on Bangladesh economy, nature of existing cluster innovation in tourism industry,

problems underlying in implementing cluster innovation, way to develop cluster innovation and some suggested policy implication through the representation of cluster innovation model through primary as well as secondary data analysis. These sorts of arrangements will definitely help to be concerned about the present cluster innovation scenarios, its acquaintance with some models for implementation of cluster innovation concept in tourism, which all are subjects to be considered as importance of the study.

3. Objectives of the Study

The objectives of the study can be stated as under:

- i. To identify the way(s) and potential benefits of applying cluster innovation concept in Bangladesh tourism industry;
- ii. To identify the opportunities to develop tourism services through integration and collaboration among the concerned parties;
- iii. To find out the problems of applying cluster innovation concepts in Bangladesh tourism industry; and
- iv. To put forward some policy implications based on the identified problems regarding the application of cluster innovation concept in Bangladesh tourism industry.

4. Methodology of the Study

This present study is exploratory one and the research design is qualitative in nature. The experts of Bangladesh tourism industry and underlying service providers and actors of tourism industry of Bangladesh were considered as population which includes industry experts, the National Tourism Organizations, hotel/motel owners, tour operators, travel agencies, and research firms etc. Two representatives from each group were chosen by using convenient sampling technique as the subject to collect data. A personal in-depth interview by using unstructured & open ended questionnaire was used to collect primary data. In addition, secondary data was also used in this study and were collected from different annual reports, journals, web pages and different published and unpublished reports.

5. Literature Review

Some major theories which are relevant with cluster innovation in tourism industry have consulted for the purpose of literature review. The underlying concept of clusters dates back to the 1890s and is the work of Alfred Marshall. In recent times, the term cluster was introduced and popularized by Porter (1990) and describes that clusters are geographic concentrations of interconnected companies and institutions in a particular field, linked by commonalities and complementarities. Cluster brings utmost profit through geographical concentration and collaboration. It has been found that globalization has, somewhat ironically and strengthened the role of clusters in increasing the competitiveness in tourism industry and significantly increased their global reach in attracting people, technology and investments, serving

global markets, and connecting with other regional clusters that provide complementary activities in global value chains. The cluster concept suggests that industries grow in certain regions as opposed to others for other reasons than pure economic factors. Thuermer (2000) states that clusters promote specialized and tightly knit relationships between buyers and their proximate suppliers. The cluster concept focuses on the linkages and interdependencies among actors in the value chain in producing products and services and innovating (OECD, 2007). Bangladesh tourism industry is of no exception from this. Froster (1998) has mentioned its comprehensive report on the Strategic Master Plan for Tourism in Bangladesh that for the development of infrastructure, national airlines, and overall tourism in the country, the government of Bangladesh has taken attempts to make substantial investments which require to be properly supported by effective management and marketing activities in order to meet the policy objectives and ensure a realistic return from these investments. It is argued by the researchers and also describing as a weakness of the statement of Foster that only taking attempt(s) by government in the field of development of infrastructure, national airlines, and overall tourism in the country are not the proper way to bring more profit from this industry. OECD (1996) described that the key to growth for many small firms within a cluster is its ability to gain strength through cooperation and collaboration utilizing formal and informal networks.

Hjalager (1997) states that generally the private profit-seeking agents allocate resources in innovating and developing new products and techniques of production. The term innovation can be viewed as the search for, and the discovery, development, improvement, adoption and commercialization of new processes, new products, and new organizational structures and procedures and thus, innovation system in tourism can be considered as a set of institutions whose interactions determine the innovative performance of national firms (Nelson and Rosenberg, 1993). Viotti (2002) suggested that most innovation taking place in developing countries is related to the absorption of technology and competence building rather than resulting in introductions of new-to-the-world innovations.

The value proposition is an important aspect in case of tourism industry and is considered as an implicit promise a company makes to its customers to deliver a particular combination of values (Martinez, 2003). Kotler (2010) described that value proposition is the full positioning of a brand-The full mix of benefits upon which it is positioned” in other words it can be said that “the whole cluster of benefits the company promises to deliver. Value propositions are an extension of the three original value propositions proposed by Treacy and Wiersema (1996) by introduction of the new value dimension, i.e. Hard Value and Soft Value. To ensure value proposition in the tourism industry some factors are to be considered those are responsible for: location, price, services, room, hotel quality, safety, availability, value added services etc.

6. Findings & Analysis of the Study

Cluster innovation concept is popular and necessary to increase the ultimate performance of a tourism industry of any country. Bangladesh tourism is of no

exception from this. Considering the importance of the same, the present study was undertaken and the findings of the study can be stated as under:

6.1 Present Cluster Innovation Scenarios of Bangladesh Tourism Industry

Present status of Bangladesh in world tourism is not very remarkable in compare with other countries of South Asian nations. But it could be very impressive. It can be described from two of the sides that what is going on in the clustering field of Bangladesh. It has been found that two types of clustering are being practiced in the tourism industry in Bangladesh: (i) Geo-Cluster, (ii) Collaborative & Networked Cluster. The present level of implementation of cluster in tourism industry both from the geographical perspective and from the existence of collaboration and networking within the parties involved in tourism industry is found as in a very embryonic level among the world tourism industry. Both cluster and cluster innovation concepts are mostly new to the actors of the concerned industry. The major actors like the national tourism organizations, hotel owners, and tour operators are not well acquainted with the concept of cluster innovation at present. All the actors are doing business in their own ways, inviting customers and providing services to them by his efforts without any structured plans to attract tourists more to stay in the destination country (Bangladesh) one week more.

6.2 The Characteristics of Existing Geo-Clusters of Bangladesh Tourism Industry

Bangladesh is a riverine country contains various types of areas those are low land, highly rocky, flat areas etc. As there are different parts of the country having different modes and nature of the land it is possible to do cluster in a very glorious way. At present Bangladesh does not have any quality geographical clustering condition as like as the developed nations like European one. Bangladesh tourism industry is suffering from the absence of the benefit produced by geographic concentration. The area of country is small in compare with the developing nations and the neighboring countries like India. In spite of being small and divided into several divisions its tourism industry does not get any clustering facilities that are mostly followed by other countries developed in this industry. These divisional parts can be used as clusters in a normal sense but these are not pure clusters at all that can be considered as geographic cluster at all. It is found in developed countries in tourism, the clusters or areas are mostly well planned and having very decorated infrastructures which is quite absent in Bangladesh. In EU countries it is common that most of the tourism destinations are made based on coastal areas and in front of sea shore. As Bangladesh contains the world largest sea beach and as well as world largest mangrove forest it is easily possible to develop this region as a part of the planned geographical clustering.

The characteristics of existing geo-clusters Bangladesh tourism industry can be simplified as following ways: (i) the existing clusters of Bangladesh are unplanned in nature, (ii) the areas are divided or distinguished by natural ways, (iii) infrastructural standard of the clusters of Bangladesh tourism regions is below standard, (iv) no initiative has been taken yet to bring any change or to be furnished in adding value to attract tourists, and (v) concentration within the tourism sub-spots are been neglected. It can be commented that the existing clusters of Bangladesh tourism are

not acquainted with the concept of innovation and have a very low level of innovation. Clusters are not the matter of importance yet to the policy-maker of the country that actually is a reason for being low level innovation and newness. Lack of specialization as well as small degree of little customization of the clusters are involved in the present clusters of Bangladesh tourism. Clusters are only in the defined level and the concept is in the embryonic stage to the industry. It is too difficult to access into any cluster in a planned way and to stay there because of rigid accessibility condition. The hill tracts clusters as well as the clusters like St. Martin are not easily accessible yet. The transportation facilities in the national tourism are still in a very poor condition which ultimately makes the spots or destination rigid to enjoy especially for the foreign tourists who are willing to spend more money. Some sights containing flora and fauna are mostly remaining unvisited by the tourist because of unavailable transportation facilities. Only Sundarban, St. Martin and Cox's Bazar are mostly trade marked by the foreign nations as tourists region. Absence of regional trademark is a great cause of reduction of attraction by the tourists which is another characteristic of existing clusters of Bangladesh at present. Supporting services of tourism business are mostly absent in present clusters which sometimes create problems to be recognized by the world tourists. These all dimensional analysis and represented characteristics of present geographical cluster in Bangladesh tourism help to come to a concrete decision that all the geo-clusters of Bangladesh tourism exist in underdeveloped and embryonic stage.

6.3 Collaborative and Networked Clustering Scenarios of Bangladesh Tourism Industry

Creative clusters have much to gain from establishing links with other local sectors. Collaboration and networking in cluster are two ways to make a cluster lucrative to the tourists through creating and providing extra value to the customers in the tourism industry. In Bangladesh it is a matter of grief that there are numerous tour operators, travel agencies, transportation service provider, almost 63 hotels, 39 quality rent-a-car service providers, food suppliers, national tourism organizations. None of them are not warmly acquainted the collaboration and networking concepts let alone to be in the implementation of. Parties are not networked among them to get prompt services and to have extra capability of being networked. Thus, at present many of the value creation as well as value delivery activities in tourism are not under collaboration and networking condition followed by the actors of the industry. At each era networking and collaborative efforts bring dexterity and also reduces costs of production and distribution to the economy at everywhere which ultimately create and deliver extra value are almost absent among the parties in tourism industry of Bangladesh.

6.4 The Characteristics of Existing Collaborative and Networked Clusters of Bangladesh Tourism Industry

The characteristics of existing collaborative and networked clusters of Bangladesh tourism industry can be simplified as following ways: (i) intense level of competition with aggressive planning to beat other competitors exists in the tourism industry in Bangladesh at contemporary time period, (ii) flexible access to the market by various tour operator and traveling company, and having no control as well as

guidelines by proper authority can be considered as major issue for this type of competitive scenarios, (iii) at individual level to organization the extent of co-operation among parties are very feeble and co-operative mentalities are absent in the tourism clusters, (iv) from functional dimension, different actors of clusters invite and sale tour packages to the tourist by themselves rather than creating some sorts of sharing of functions for providing better services to the clients, Ministry of Tourism and national tourism institutions in accordance with hotels and resorts owner are taking a few development strategies seasonally like the event (T-20 world cricket cup match). The level of taking development strategy initiatives are still in embryonic stage. As the level of networking and collaboration are not in satisfactory level more efficiency and opportunities of creating jobs are at medium growing conditions. To the actors of the clusters collaboration and networking is vague and new concept let alone the innovation through clusters. Thus it is reflected that there is absence of the newness of the concept of cluster though there have enormous chances to be developed.

6.5 Comparison of Clusters of Bangladesh with Developed Nations

Though the emerging economies remain the main drivers of this recovery for the tourism sector and of being 22th position by growth among 184 countries of the world (WTTC, 2013) Bangladesh differs in many fields in tourism from the developed nations. The major differences between the world's most attractive and developed countries' clustering and the scenarios of Bangladesh can be compared from many angles.

From the quality logistics dimension it is found that Bangladesh tourism industry is in average level whereas developed nations are very much advanced in providing quality logistics for their tourism. Bangladesh tourism industry and its underlying actors are using backdated communication means with their supportive parties and tourists. From investment in infrastructure dimension it is found that Bangladesh tourism has low level of investment in developing infrastructure whereas developed countries are investing extremely in developing infrastructure in various clusters as well as welcoming newness. Government driven efforts to increase innovation are in miniature form and the level of efforts for the development of the cluster through bringing newness by the government is feeble. Government of Bangladesh is mostly unconcerned about the issue whereas in developed countries it is clear that they are more concerned about the issue. Nature of destination clusters of Bangladesh tourism is mostly unplanned whereas developed countries' clusters consists both planned and unplanned initiatives. Cultural heritages are high in Bangladesh but publicity of these heritages is not upto the mark whereas developed countries' clusters possess the opposite. Political stability for the development of cluster within a tourism industry is also a considerable dimension. Bangladesh has political instability whereas developed countries are paying more attention on this factor. Involvement of education & research institutions is low in Bangladesh tourism industry to appreciate innovation through clustering whereas developed countries like EU are focusing more on the involvement of education & research institutions and bringing new ideas and innovative theme for the development of their tourism. Technology orientation in cluster innovation in Bangladesh now a day is increasing slowly and is not up-to-date

whereas developed nations are continuously developing and implementing technology in tourism. Extent of co-operation among the supportive firms and actors are seemed feeble whereas in developed nations cooperation is strong. These dimensions are good enough to have a clear assumption and total picture of how efficient is the tourism industry of Bangladesh in introducing, developing, and implementing cluster innovation concept. Thus it is clearly understood that Bangladesh exists in a very embryonic stage.

6.6 Insights Derived from Industry Experts' Opinions

The industry experts' opinions derived from in-depth interviews clearly state for the development of Bangladesh tourism industry and attract more tourists to her destination needs to focus on various layers of clusters in order to minimize probable disadvantages, increase of benefits, overcoming of the problems, finding some way to introduce cluster innovation in tourism and so on. The layers into which Bangladesh tourism industry needs to focus on and which are derived from the insights of the industry experts can be summarized and portrayed through the following figure:

Figure: Layers of Cluster



Source: The Economic Competitive Group (Available at: <http://www.ecgroup.com/methodology/cluster.htm>, accessed on 31.08.2014)

Here the leading firms along with the supplier firms need to create a strong collaboration or network. The extent of collaboration and networking among the leading firms and the supplier firms like travel service providers, hotel facilities suppliers, food and beverage suppliers etc. will determine how efficiently the input for service production are being used and creating synergy effect in total tourism service industry. For this purpose economic infrastructure that consists of human resources, technology, finance and capital, business climate, physical infrastructure is

needed.

The summary of the industry experts' opinion can be stated as: i) creating awareness and co-ordination to all parties, ii) creating mutual trust, and iii) by following developed countries. Way to develop tourism industry via cluster innovation through: i) creating geo-clusters ii) providing credit facilities to enlisted tourists, iii) creating dynamic effect through networking and collaboration etc. Benefits that can be achieved through cluster innovation can be: (i) Multi countries partners will join through networking facilities, (ii) time benefit, (iii) cost benefit, (iv) extra value, (v) reduction of extra competition, (vi) infrastructure & supporting industry development. Disadvantages of introducing cluster innovation that may arise are: (i) barriers in co-ordination, (ii) appearance of mistrusts, and (iii) costly to handle. Value proposition through cluster innovation can be extended into the following: (i) minimization of cost, (ii) increasing of staying duration via enormous facilities, (iii) generating trusts among tourists, and (iv) tailor-made services for disabled tourists. Opportunities to develop tourism industry through cluster innovation are subject to the following: (i) development of travel & transformation facilities, (ii) opportunities to do branding Sundarban as the largest mangrove forest, and (iii) opportunities to highlight archeological sectors to the world etc. Major problems to apply cluster innovation might be the following: (i) creating mentality of all underlying parties to be clustered both by geo-clustering and collaboration, (ii) making government more concern regarding this issue, (iii) recognition of tourism industry as a sector etc.

7. Recommendations

The first and foremost thing required to imply for acquiring advantage from the application of cluster innovation concept is to declare tourism industry as a tourism sector. It is needed to develop infrastructure in major tourist spots by a means of modern amenities and in a way that will ensure the attraction through transportation, and accommodations facilities for the tourists. A clear developmental & operational strategy as well as cluster innovation policy at national level should be developed which will be approved by national policy making authority. In Bangladesh different policy making institutions, experts, universities, and research firms can offer rigorous plans regarding the cluster innovation policy and its implication which can be obtained from the successful developed country's national policy. All sorts of benefits must need to be communicated to the actors so that they can be influenced. Accessibility to all the existing geo-cluster must be ensured to reap ultimate benefits from the cluster innovation concept. St. Martin which took 12.5 million years to be formed can be a great trademark for the country to do brand it globally. Sundarban, which is the world largest mangrove forest, can also be the brand which can be used as regional trademark and through more profit can be earned through the implementation of cluster innovation concept. Ensuring the active involvement of education & research institutions is necessary. The extent of aggressive competition among the actors of the tourism industry of Bangladesh needs to be appeased in order to introduce the cluster innovation concept successfully. Proper business policy that has been established to convert tentative disadvantages into consistent advantage must be introduced and applied. Creating mutual trusts and mentality to accept

collaboration & networking, development of quality transportation system, training and information about saving and access to credit, providing tailor made services for disabled tourists in clusters etc. can be the way which are recommended here for the development and implementation of cluster innovation. To do branding regions can be clustered into different brand names like: i) Mangrove cluster, ii) Archeological cluster, iii) Hill track cluster, iv) Heritage cluster, v) Coastal cluster etc. For the collaborative & networked cluster innovation some policies can be used as fuel to bring more positive output: i) aim for sustainability, ii) the inspiration to act wisely, iii) development of extreme collaboration & networking among the actors.. Large extent of development and collaboration among all the actors in tourism clusters works as fuel for the development of innovating ideas as well as introducing of extra value proposition in tourism is a proof of benefit of collaboration and networking. This can be represented by the help of a figure below:

Figure: The Development of Collaboration and Networking among the Actors



When all the actors of tourism cluster will be collaborated and networked among each other it will bring the opportunities to provide more value proposition to the tourist. University by focusing on its curriculum, research firms with its innovative ideas and development, financial organizations by coming forward to finance, media firms by providing media coverage, marketing firms by helping to sense the desired

pattern of tourists needs and providing the guidelines to response tour packages for individual tourists in a customized way can bring maximum benefit through collaboration.

8. Conclusion

Tourism is a multidimensional industry which creates multi effect and diversified impact on the economy of a country. Bangladesh has full of scope of being a successful country in tourism as there are enormous amount of scenic beauty and natural geographical contents which are not in the proper utilization because of having no planned infrastructure, proper guidelines and initiatives, willingness, and a concrete framework like developed countries' tourism. In this research paper it can be noticed that Bangladesh has all kinds of elements and active actors to appoint in tourism's development. Only the absence of cluster innovation concept and its utilization the tourism industry of Bangladesh is not getting the energy to be fastest growing industry because all the materials of development might present but the absence of geo-cluster initiatives to attract the visitors to any specific region and to stay long duration in the destination are remaining unutilized. On the other hand the absence of the extent of collaboration and networking among the actors as well as government and its policy maker aggressive, competition costly service production, time consuming efforts to attract tourists, and under development in the overall tourism industry is being noticed at present time period. The development, introducing, and implementation of cluster innovation concept can bring the solution as well as can ensure the overall development through the attraction generation to both domestic and foreign tourist in near future. Thus it is high time to rise up and to become concerned about the issue and to take the initiative to imply the concept of cluster innovation in the tourism industry of Bangladesh and so on.

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