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Andrzej Rapacz



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**Marian Gúčik, Tomáš Gajdošík, Zuzana Lencsésová,
Miroslava Medved'ová**

Matej Bel University Banská Bystrica, Slovakia
e-mail: Marian.Gucik@umb.sk

TOURISM CLUSTERS AND THEIR ACTIVITIES IN SLOVAKIA

KLASTRY TURYSTYCZNE I ICH DZIAŁALNOŚĆ NA SŁOWACJI

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Summary: The fragmented nature of tourism supply and the decreasing competitiveness of Slovak destinations force tourism stakeholders to cooperate. One of the forms of cooperation is the creation of clusters, as innovative organizational structures in tourism. The aim of the paper is to examine the creation of tourism clusters in Slovakia and to analyze their activities with respect to the structure of their members, vision and activities. The survey is based on the analysis of bylaws and annual reports of tourism clusters. We examine to which extent the six active tourism clusters (Západné Slovensko, Liptov, Orava, Turiec, Horehronie and Dudince) meet the selected criteria based on causal analysis of domestic and foreign scientific literature. Slovak clusters have the character of destination marketing organizations and following the Law no. 91/2010 Coll. on Tourism support they are transformed or become part of the destination management organization.

Keywords: cluster, cooperation, destination, tourism.

Streszczenie: Rozdrobniona oferta turystyczna i spadająca konkurencyjność słowackich regionów turystycznych zmuszają podmioty zainteresowane rozwojem turystyki do współpracy. Jedną z form współpracy jest tworzenie klastrów jako innowacyjnych, organizacyjnych struktur w turystyce. Celem artykułu jest badanie procesu powstawania klastrów na Słowacji i ocena ich celów statutowych, wizji i działań na rzecz członków. Dokonano analizy statutów oraz sprawozdań rocznych klastrów. Zbadano, w jakim stopniu sześć istniejących klastrów (Západné Slovensko, Liptov, Orava, Turiec, Horehronie a Dudince) spełnia kryteria ustanowione na podstawie analizy krajowej i zagranicznej literatury przedmiotu. Słowackie klastry mają charakter organizacji marketingowych i po uchwaleniu ustawy č. 91/2010 o wsparciu turystyki są przekształcane i stają się częścią regionalnych organizacji turystycznych.

Słowa kluczowe: klaster, region turystyczny, turystyka, współpraca.

1. Introduction

Tourism has a strong regional aspect. It assumes the existence of natural, cultural and historical attractions (primary resources, primary supplies) and social activities (secondary resources, secondary supplies) focused on the utilization of primary resources. The owners of primary and secondary resources are public bodies as well as private sector, which are involved in the provision of services (creating a product for visitors of tourist attractions in order to satisfy their needs). The primary resources as well as secondary resources of tourism are linked to a specific territory (destinations – tourism resorts and regions).

In destinations with attractive primary supply inducing visitation, tourism has become the subject of its economic appreciation and the tool of destination or regional development. Tourism stakeholders (the authorities and public sector institutions, as well as businesses and private sector organizations) have to cooperate in the product development in a destination, because each of them provides specialized services and together they offer a comprehensive tourism product. If the region has the appropriate resources for the tourism development, the comprehensive economic specialization and other further activities, public and social infrastructure develops. Thus tourism becomes a factor of job creation in its own and related industries, has a direct and induced effect on value creation and growth of the gross domestic product of the region as well as influences social and cultural development of the region [Gúčík 2011].

2. Theoretical background

In the early 21st century, under the influence of increasing globalization, first tourism clusters were established. M. Porter [Pícha 2006] describes a cluster as a geographic concentration of interconnected businesses, specialized suppliers, service providers and businesses in related industries, which compete with each other, but also cooperate in order to improve their market position. It is important that the cluster is linked to the market and research organizations which carry out innovation processes. Thanks to this fact, the small and medium-sized businesses included in the cluster increase their competitiveness by successive innovative steps and cooperative behaviour.

Tourism clusters differ from industrial ones. Vanhove [2005] defines tourism cluster as a group of the tourist attractions, businesses and institutions involved directly or indirectly in tourism, associated in a specified geographic area. Tourism clusters are focused on providing services and allowing cooperation for isolated businesses, improving competitiveness of tourism destinations and introducing innovations to praxis. Their specificities arise from the particularities of tourism product. The main feature in which the tourism cluster differs from industrial clusters is the orientation on developing and enhancing the competitiveness of the region as a destination.

In the creation and during the process of cluster operation the potential and actual benefits are taken into account [Staszewska 2008], such as taking a stronger position on the market, reducing costs, exchanging experience, offering a wide variety of products, acquiring new customers, providing comprehensive services, increasing competences and new organizational possibilities and building new principles of cooperation improving the quality of common capital. One must also take into account that the creation and operation of the cluster is also related with barriers.

The cluster consists usually of *a core* (leading businesses, even competing and complementary ones, which form synergistic effects by assembling offered products and thus maximizing the value for customer), *supporting businesses* (directly or indirectly support businesses in the core of the cluster, e.g. suppliers and sub-contractors), *soft local infrastructure* (local schools, research institutions and universities, regional development agencies, local business and professional associations), *hard supportive infrastructure* (roads, waste management, etc.).

The establishment of the cluster is a long process, based on the existence of favourable conditions in the destination and the sequence of steps. The cluster has its own life cycle as other tourism destinations. The establishment of a cluster at first supposes the identification of tourism potential for the presence of the cluster. The aim of this identification is mainly in [Gúčík 2010]:

- a) the identification of existing or potential competitive advantages that have perspective for further development,
- b) the creation of strategies to exploit key opportunities for businesses, involved partners and destination,
- c) the creation of added value for the customer with the possibility of offering a comprehensive product on the national and international tourism market,
- d) the creation of jobs and sustainable development of destination,
- e) solutions to common problems using the cluster initiative.

Based on this identification, the establishment of a cluster is discussed. However, it is the operation of the cluster that shows whether the establishment of formal organization was justified. When creating a cluster, we also find some barriers. They are mainly the lack of core local business or weak mutual relations between service providers. When creating a cluster, tourism does not have to be the core activity. An example where tourism fulfils in the beginning only a supporting role to other sectors, especially agriculture and wine industry, is the Napa Valley cluster in California (USA).

Clusters contribute to the assembled regional tourism product and improving its quality, which helps to protect the environment, they have an impact on innovation activities, human resource development, as well as economic and social development of the region.

3. Aim, material and methodology

The aim of the paper is to examine the creation of tourism clusters in Slovakia and to analyze their activities with respect to the structure of their members, vision and activities. We will examine those tourism clusters, which are active and cooperate with their members. The survey will use the secondary information sources such as web pages, bylaws and annual reports of the tourism clusters.

Based on the causal analysis of the domestic and foreign literature we define the criteria, which active and effective clusters should meet. The criteria are focused on the organizational structure, membership structure, vision and activities of the clusters. We identify 6 active tourism clusters (Západné Slovensko, Liptov, Orava, Turiec, Horehronie and Dudince) in Slovakia. We will examine to which extent the clusters meet selected criteria.

4. Results and discussions

Due to the constantly changing tourism demand on the market it is necessary to offer not only individual services, but also packages under a common brand. Tourism businesses have to enter the market not individually, but as part of the tourism destination. They have to cooperate on the product creation and its commercialization. Cooperation between the public and private sector in Slovakia has undergone several phases of formation and resulted in a variety of formal associations.

4.1. The creation of tourism clusters in Slovakia

The organizations based on the public-private partnership principle were created in Slovakia after 1990. They had the character of tourism associations as non-profit organizations. Their main mission was to create the conditions to meet the needs of tourism visitors, to develop the entrepreneurial activities and to coordinate the interests of tourism stakeholders. According to the level on which they are based, we distinguish local, regional, and microregional tourism associations. Their activities were financed primarily by membership fees, revenues from sales of own services, domestic and European Union funds, grants and voluntary contributions.

The operation has shown that the activities of the associations had some weaknesses. The legislation did not create sufficient space to finance the activities of tourism associations and so the state did not motivate their creation. The members of the association were not always decision-making tourism stakeholders, which significantly influenced the creation of the destination product. The associations usually did not have permanent professional staff, but the members provided the tasks outside their main jobs. Part of the tasks was transferred on the local tourist information offices and a lot of tasks were not fulfilled. The activity of the tourism associations was mainly focused on the product creation and its marketing. Therefore they were mainly seen as marketing organizations.

Since 2008 the tourism managerial organizations called “cluster” have been created, for example Klaster Liptov, Klaster Orava a Klaster Turiec, Balnea Cluster Dudince, Klaster Horehronie, Novohradský klaster, Klaster cestovného ruchu západné Slovensko and Košice Turizmus. They were created on the initiative of the private and public sectors in specific circumstances where developed public-private partnership that could develop into a cluster did not exist. An important motivation to create them was the effort to coordinate the marketing of a tourism region, the tourism development in the region and the pressure of the competition [Belešová 2011]. Due to the lack of focus on research and innovations the tourism clusters were far away from the real cluster conception and were more like the destination management organizations.

The establishment of new and the development of existing clusters were stopped due to the adoption of the Law no. 91/2010 Coll. on Tourism support, which creates the conditions for the establishment of local and regional tourism organizations, determines their competence and defines the way of public funding. Local tourism organizations finance their activities mainly from membership fees, which are tax expenditures, then from the state subsidies, revenues from the sales of own products and services, voluntary governments contribution as well as natural and legal entities.

The main motivation of tourism stakeholders’ cooperation within a local tourism organization is the possibility of obtaining the state subsidies which together with membership fees contribute to the financing of activities to promote tourism development [Gúčik 2012]. A local tourism organization can obtain the state subsidy in the amount of collected membership fees. Upper limit of the subsidy is up to 90% of the amount of accommodation tax and declares that its limit is determined according to the economic benefits of tourism development in the destination. It motivates the accommodation facilities to transfer the accommodation tax to the municipal budget.

These facts influenced the further work of existing tourism clusters that were transformed to local tourism organizations according to the Law no. 91/2010 Coll. in order to obtain the state subsidy (Klaster Orava has kept its name and from 9 January 2012 has been a local tourism organization). Respectively they became a part of local tourism organizations (Balnea Cluster Dudince is a member of local tourism organization Dudince, Klaster Horehronie is a member of local tourism organization Nízke Tatry Juh, Klaster Smolenice is a member of local tourism organization Trnava, Klaster Turiec is a member of local tourism organization Turiec-Kremnicko). In terms of business activities and objectives, tourism clusters in Slovakia carried out the functions of destination management organizations and were replaced with local tourism organizations.

4.2. Analysis of tourism clusters

Tourism clusters in Slovakia have in legal terms a character of interest associations of legal entities or civil associations. The structure of the members shows that they arose by the cooperation and the concentration of businesses on the basis of their

geographical proximity. All the examined clusters were formed by members, which are in the same geographical area (region), despite the fact that visitors often satisfy their needs related to participation in tourism businesses and entities outside the region. The organisational structure of tourism clusters should correspond also to the value chain that creates a complex product for the visitors and competences of stakeholders, which would lead to a coherent chain of tourism services (Table 1).

Table 1. Activities of tourism clusters in Slovakia

	Criterion/Cluster	Západné Slovensko	Liptov	Orava	Turieč	Horehronie	Dudince
Basic information	Legal form	Interest association of legal entities					Civil association
Organizational structure	Geographical proximity Value chain competencies	x	x	x	x	x	x
Structure of members	Core supporting businesses		x	x	x	x	x
	Soft local infrastructure		x	x	x	x	x
	Hard supportive infrastructure	x	x	x	x	x	x
Vision	Increasing competitiveness		x	x	x	x	x
	Transmission of information					x	
	Increasing the power and influence of SMEs					x	x
	Effective networking and partnership	x		x	x	x	x
	Increasing innovation Regional development	x	x			x	x
Activities	Joint research activities						
	Marketing activities	x	x	x	x	x	x
	Consulting training	x			x	x	
	Print of materials	x	x	x		x	x
	Environmental protection						

Source: own elaboration, 2015.

Klaster Západné Slovensko was established in December 2008 and founding members are the municipal region of Trnava and Galanta town. The cluster has currently five associate members – Sered' town and villages: Dolná Streda, Šoporňa, Smolenice and Kluster Smolenice. In terms of members' structure the core which is supporting local businesses and soft local infrastructure is missing in the cluster. Businesses or educational institutions are not members of the cluster either. This fact is in contrary to the vision of the cluster, which is to link various levels of the industry by partnership, to support the development of tourism in the region, to preserve and to make the cultural, historical and natural heritage available. Maintaining these values will create the conditions for connecting the recreational tourism and cognitive tourism. The activities of this cluster are reduced to print materials and consulting in workshops. There is lack of joint research as one of the most important activities. Thus the activity of the cluster is reduced to marketing communication in the domestic market.

The cooperation of tourism stakeholders in Liptov region resulted in the emergence of Klaster Liptov in August 2008, which was established by tourism businesses Gino Paradise, Tatrallandia, Jasná Nízke Tatry and Ski & Bike Park Ružomberok, towns: Liptovský Mikuláš, Liptovský Hrádok and Ružomberok and 16 villages. From the membership point of view, the cluster is represented by the core (operators of mountain transport facilities and aquaparks), supporting businesses and hard supportive infrastructure. In this cluster there is no soft local infrastructure, particularly educational institutions. A vision of the cluster is to create a recognizable European tourism destination from Liptov with the strategic objective of increasing the number of visitors. This vision is being fulfilled in cooperation with local tourism organisation – Region Liptov. In the cluster, marketing activities and editorial activities are dominating, where the introduction of a uniform booking system and the regional card for visitors are emphasized. The cluster works with local tourism organizations as a destination management organization.

Klaster Orava was established in June 2009 and its members are aquapark in Dolný Kubín, three ski resorts (the core), hotels, guesthouses (supporting businesses) and Zuberec village (hard supportive infrastructure). In the structure of the cluster members there is an absence of soft local infrastructure. A vision of the cluster is: "Attractive region of Central Europe's unique experience with the unmistakable taste and aroma, which will live from tourism". The aim of the cluster is to create identity, system of marketing and integrated marketing communication in the Orava region. The activity of this cluster focuses on creating partnerships, working with the media, printing promotional materials and participating in the presentations, fairs and exhibitions, creating a web page and tourism product packages.

Klaster Turiec was founded by two towns (Martin and Vrútky) and four ski resorts (Jasenská dolina, Valčianska dolina, Martinky and Fatra Ski) in June 2009. Even in Klaster Turiec there are no representatives of soft local infrastructure. A vision of the cluster is: "Turiec as an attractive tourist region, where everyone

returns for an unforgettable experience, relaxation and active recreation in nature, for freshness of mineral and thermal springs and knowledge of cultural and historical heritage of Slovakia”. The activities of Klaster Turiec are limited to marketing (creating product packages and website) and training (working group meetings, communication of tourism stakeholders in the destination).

Klaster Horehronie was established in June 2011 as an interest association of legal entities. Its founding members were Brezno town, villages: Čierny Balog and Mýto pod Ďumbierom, Braváčovo, Tále, Inc. (the operator of mountain transport facilities and a golf resort), Tatry mountain resort, Inc., Ski Center Mýto, Inc., Ski Center Čertovica and Local Tourism Association Nízke Tatry – Juh. The villages of Bystrá and Osrblie are included as associated members. The main objective of the cluster is to coordinate the development of tourism in the Horehronie region. The founding members (inspired by Klaster Liptov) expect the increase of the number of visitors in the region and the utilization of tourism facilities. A vision of the cluster is to create systematic tourism, which provides the quality in tourism destination for visitors. Klaster Horehronie performs marketing activities, including printing materials, and provides consulting services through organizational and economic consultants.

Balnea Klaster Dudince was established in June 2008 as the first spa cluster in Slovakia. The members of the cluster are: Dudince spa, Slovthermae and Hviezda, Prameň, Flóra, Park Hotel Hokovce hotels, Dudince town and Banská Bystrica municipal region. Spa facilities form the core of the cluster. The cluster was established due to the coordination of its members, the need of information and



Figure 1. Geographical distribution of tourism clusters in Slovakia

Source: own elaboration, 2015.

consulting services in tourism and the organization of events for visitors of Dudince town and its surroundings. The main objective of the cluster is the expansion to create conditions for the development of the cluster members, and the admission of new members who do not work directly in the tourism sector, but may contribute to the development of clusters and regions. The cluster mainly performs marketing activities and printing of promotional materials that are distributed through the tourist information office.

Geographical distribution of tourism clusters in Slovakia is presented in Figure 1.

A vision of analysed tourism clusters is predominantly focused on increasing the competitiveness of the destination, effective networking and partnership of members and regional development. The clusters are not aimed at increasing the innovativeness of the region and increasing the impact of small and medium-sized enterprises. The analysis of activities of tourism clusters shows that clusters focus mainly only on marketing activities and printing materials. Some clusters perform consulting and training functions for their members. They conduct neither joint research nor joint innovation.

5. Conclusions

The creation of cluster structures in Slovakia is a new phenomenon. Motives, objectives and benefits of membership in clusters result from the specificities of tourism and its product. The development of tourism clusters in Slovakia has been clear so far. If they want to meet the concept of a cluster, they have to focus also on cooperation with research and development institutions, obtain other stakeholders from outside the tourism sector, but involved in tourism, promote the development of their members and the regional economy. Slovak clusters have the character of destination marketing organizations and following the Law no. 91/2010 Coll. on Tourism support they have been transformed or become part of the destination management organization.

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