

ANNUAL TOURISM REPORT 2012

SLOVAKIA

1. INTRODUCTION

Council Decision 86/664/EEC of 22 December 1986¹ establishing a consultation and cooperation procedure in the field of tourism foresees that “each Member State shall send the Commission, once a year, a report on the most significant measures it has taken and, as far as possible, on measures it is considering taking in the provision of services for tourists which could have consequences for travellers from the other Member States”.

With the publication of the “Agenda for a sustainable and competitive European tourism”, the Commission announced that “in order to strengthen the collaboration with and among Member States, their current annual reporting through the Tourism Advisory Committee (TAC) will be used to facilitate the exchange and the dissemination of information about how their policies and actions safeguard the sustainability of tourism”.

This Communication was welcomed by the Competitiveness Council conclusions (22nd-23rd November 2007) and by the Presidency Conclusions of the Brussels European Council of 14th December 2007.

The main aims for the reporting process are:

- to be able to monitor the level of implementation of the “Agenda for a sustainable and competitive European tourism” by Member States;
- to facilitate the exchange of experiences among member States with regard to how they tackle issues which are important for the competitiveness and sustainability of European tourism.

MS reports referring to year n shall be sent to the European Commission by the end of February of year $n+1$.

If the reports are sent in English, the deadline is shifted to the end of April.

2. ORGANISATIONAL STRUCTURE

This section should provide an overview of the main organisational structure to illustrate how tourism is organised and managed, to identify linkages and to identify the engagement of other organisations/stakeholders.

The information required will only need to be prepared fully in year 1 as it will subsequently only be necessary to provide details of any changes.

2.1 Please identify the National Bodies responsible for tourism (Ministry and also any separate/related National Tourism Organisation), including key areas of responsibility, and their relationship to other national bodies. (maximum of 1.000 characters)

Since November 1, 2010 responsibility for tourism in Slovakia rests with the **Ministry of Transport, Construction and Regional Development** of the Slovak Republic.

The **Tourism Section** of the Ministry is divided into two departments – Tourism Strategy and Policy Department and Tourism Cooperation and Coordination Department, and has the following main competences:

¹ Official Journal L 384, 31/12/1986 P. 0052 – 0053.

- Creation of conditions for the development of tourism as a state priority
- Formulation, implementation and monitoring of state tourism development policy
- Elaboration of national tourism development concepts and strategies
- Preparation of legislative regulations in tourism
- Provision of required incentives and help for investments of the private sector in tourism
- Processing of comprehensive statistical data on the development of tourism in Slovakia
- Cooperation with the Ministry of Education, Science, Research and Sport of the Slovak Republic in the support of the application of international standards and in the development of education in tourism
- Cooperation with the Ministry of Environment of the Slovak Republic in the harmonization of the interests of the development of tourism and the protection of nature
- Administration of the Register of regional tourism organizations
- Representation of interests of the Slovak Republic in international tourism organizations and fulfillment of tasks and commitments resulting from the membership of Slovakia in these organizations
- Implementation of tasks of cross-border cooperation in the field of tourism
- Preparation and implementation of international bilateral and multilateral agreements in tourism, and development of bilateral contacts
- Elaboration of programmes for the development of tourism and evaluation of their implementation
- Methodical guidance and monitoring of the fulfillment of tasks of the Slovak Tourist Board.

2.2 Please, describe what organisations/agencies are used to deliver services at the national and regional level and the services that they deliver. (maximum 800 characters)

The promotion and marketing of Slovakia as a tourism destination is the core responsibility of the **Slovak Tourist Board (STB)**. STB is a governmental agency receiving contributions from the state budget and belonging currently to the Ministry of Transport, Construction and Regional Development of the Slovak Republic, established in 1995 by the Ministry of Economy of the Slovak Republic. STB markets tourism at the national level, provides information on travel opportunities in Slovakia, promotes Slovakia as a tourism destination, contributes to creation of a positive image of Slovakia abroad, supports the sale of tourism products of the Slovak Republic, and implements the EU Structural Funds in the tourism industry. STB has been authorized to establish branch offices in Slovakia as well as abroad, currently having 8 local (regional) representations and 6 abroad - in the Czech Republic, Germany, Poland, Austria, Russian Federation, Hungary.

Key tasks of the STB are as follows:

- Carries out the national marketing of the tourist industry
- Provides information on tourism in Slovakia
- Promotes Slovakia as a tourist destination
- Contributes to the positive image of Slovakia abroad
- Serves as the Mediation Organ for activities related to the implementation of the EU Structural Funds in the tourist industry.

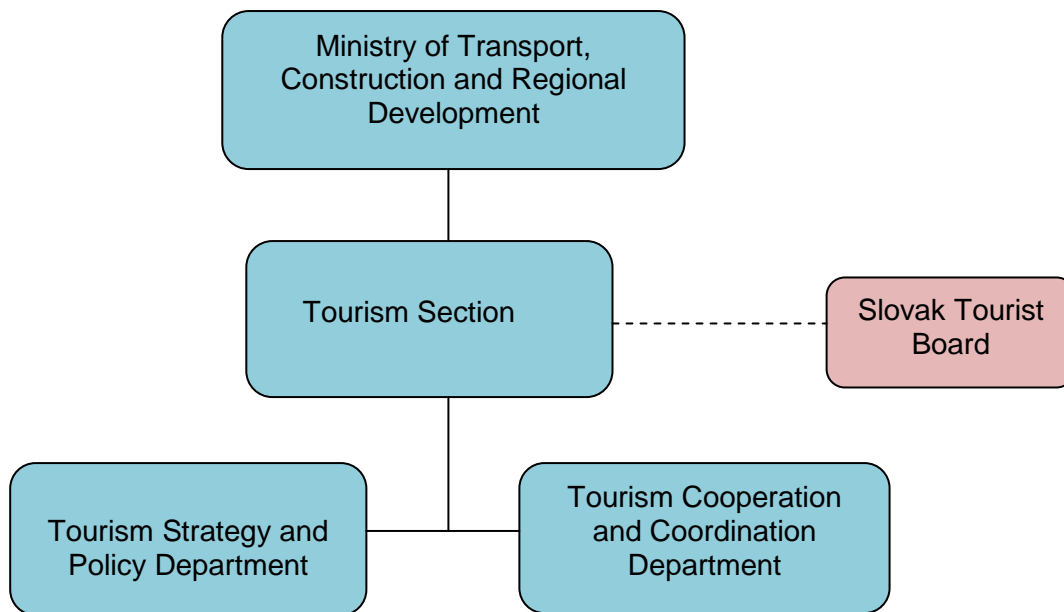
The Slovak Convention Bureau (SCB) was established in 2010 on the initiative of the Slovak Tourist Board as a non-profit entity working as an organizational unit of the STB. SCB is based on the private-public partnership and its main task is to promote actively Slovakia as a congress destination, to increase the number of congress events annually and thus promote tourism in the Slovak regions.

2.3 Please, describe which other bodies and organisations are involved at the national level and the process for involving them. (maximum 800 characters)

On January 17th, 2011 the representatives of the seven most important nationwide associations of tourism founded **The Slovak Tourism Association**. It is a voluntary non-political and professionally oriented organization of employers in tourism. The founding members are the Association of Hotels and Restaurants of the Slovak Republic, Slovak Association of Travel Agents, Bratislava Hotel Association, Lavex - cableways and ski lifts, Historical Hotels of Slovakia, Slovak Association of Rural Tourism and Agro Tourism and the Slovak Tourist Guides Associations. The association will spread out by other associations of tourism both on national and regional level and is open also to entrepreneurs. The priorities of the Association are the unification of the tourism branch, active approach to legislative changes in the area of tourism, more intense co-operation with the Slovak Tourist Board in promoting Slovakia and supporting the domestic tourism.

2.4 Please provide a diagram/organogram of the organisational structure for tourism identifying the relationship between national, regional and local bodies. Provide also a short description of the core responsibilities and competencies of each of the organisations. Include also information regarding the direct and indirect links between other departments, stakeholder organisations and unions. Information about mechanisms of decision making process participation from outsider organisations, e.g. forums, advisory committees is also requested. (maximum of 2.000 characters)

National level



Regional level

As a result of public service reform in 2001, the competencies with respect to tourism were devolved from a local civil service (district and regional offices) to eight **self-governing bodies** (regional governments – Bratislava, Trnava, Nitra, Trenčín, Žilina, Banská Bystrica, Prešov, Košice) and municipalities. The aim was to strengthen local competencies within the regions and localities which tourists visit, with the municipalities and cities playing the key role in establishing the preconditions for tourism development. The Tourism Section of the Ministry of Transport, construction and Regional Development organizes working meetings with the representatives of these self-governing bodies in charge of tourism. Their purpose is to co-ordinate the development of tourism in particular regions.

Local level

Local self-government - municipalities and towns - plays an important role in the development of tourism at local level and in co-ordination of entities in connection with this development.

By adopting the amendment to the Act on Support of Tourism in October 2011, effective from the 1st December 2011, the Ministry strives to build a model of destination management in tourism in Slovakia. It is the first systemic solution of tourism which creates a legislative frame for the launch and effective operation of **local and regional tourism organizations**. Local and regional tourism organizations are created on the voluntary basis in the form of public – private partnership (PPP) with the financial involvement of the government. In 2012, 29 local and 2 regional tourism organizations (DMOs) were created under the above-mentioned Tourism Support Act.

Tourism associations as professional entities also contribute to the development of tourism at local and regional level mainly in the field of improvement of quality, expansion of the range of products and services, development of professions based on professional training, introduction of quality standards and their

implementation, communication of best practices that increase positive benefits, etc.

2.5 Please provide information about financial data, including spend on tourism as a percentage of overall government spend, the level of national funding support for tourism marketing, the amount of EU funding support made available for tourism and data concerning the support to SMEs and Destinations. (500 characters)

The financing of tourism in 2012 (EUR):

	State budget
Ministerial tourism budget	3 319 802,64
of which	
- Tourism Section	28 500,-
- Subsidies to regional and local tourism organizations	3 291 302,64
Slovak Tourist Board	3 861 675,36

Slovakia has the opportunity to use EU funds throughout the duration of the National Strategic Reference Framework until 2013. During the programming period 2007-2013, Slovakia may use European funds totaling EUR 172.6 million for the support of business activities in tourism, the development of tourism information services, and the presentation of the regions and the country within the Operational Programme - Competitiveness and Economical Growth.

3. POLICIES AND STRATEGIES

3.1 Is there a current National Strategy for tourism? Yes No

If yes, please, provide information in bullet point format about the key aims, objectives and priorities of the strategy highlighting those that are designed to address sustainability issues in economic, environmental and social terms in particular those related in the six aims included in the Agenda. In preparing the tourism strategy, explain how consideration has been given to the 9 principles set out in the Agenda (para2.3 p5) and given in the appendix. (maximum 1.000 characters)

New Tourism Development Strategy of the Slovak Republic until 2013

The intention of the New Tourism Development Strategy of the Slovak Republic is to react appropriately to globalization trends by making use of the competition elements and for purpose of providing for sustainable development of tourism in the economic, social and environmental area.

Strategic goal:

The increase of the competitive strength of tourism by better using its potential with the aim of alleviating regional disparities and creating new jobs.

Specific objectives of tourism development:

1. Strengthening the position of tourism as an industry in the national economy
2. Increasing the attractiveness of Slovakia as a holiday destination
3. Bolstering the volume of overnight stays by tourists
4. Improving the structure of foreign visitors coming to Slovakia by raising the quality of the provided services
5. Supporting the creation of new jobs, especially in regions with a significant potential for tourism

Leading forms of tourism:

- Summer Tourism and Stays by Water
- Spa and Health Tourism
- Winter Tourism and Winter Sports
- Urban and Cultural Tourism
- Rural Areas Tourism and Agrotourism

The Government of the Slovak Republic approved on 11 May 2011 the **Marketing Strategy of the Slovak Tourist Board for 2011 – 2013**. The strategy defines quantitative and qualitative objectives, identifies measures to accomplish objectives, takes a more targeted approach to foreign markets and puts more emphasis on domestic tourism.

The Ministry is currently working on a **new tourism development strategy until 2020**. The draft strategy is

planned to be approved by the Government in May 2013. At the same time, the Slovak Tourist Board is preparing a **new marketing strategy until 2020**.

3.2 Who was the initiator and who is responsible for its implementation? (maximum 200 characters)

Initiator - The Strategy was drawn up by the Ministry of Economy of the Slovak Republic on the basis of objectives set out in the Manifesto of the Government of the Slovak Republic 2006 – 2010.

Responsibility for implementation has the Ministry of Transport, Construction and Regional Development of the Slovak Republic (it is in charge of tourism from November 1, 2010) and other ministries, institutions, self-governing regions depending on the character of a task.

3.3 How is the strategy monitored and how often? (maximum 500 characters)

The Government of the Slovak Republic obliged the responsible Minister to submit a report on fulfillment of strategic goals resulting from the Strategy to the Government annually as per June 30.

3.4 What tourism specific legislation exists? (maximum 500 characters)

National tourism legislation is harmonized with EU legislation, and the main laws in force are:

- Act on package tours and conditions of doing business by travel offices and travel agencies ([No. 281/2001 Coll.](#) as amended by the Act No.186/2006 Coll.)
- Decree of the Ministry of Economy of the Slovak Republic regulating the categorization of accommodation facilities and their grading classification ([No. 277/2008 Coll.](#))

On 19th October 2011, the Parliament of the Slovak Republic approved **an amendment to the Act No. 91/2010 Coll. on Support of Tourism**, as amended, effective from the 1st December 2011.

The aim of this legislative amendment is ensuring the efficient and fair distribution of public resources, while avoiding the threat of exceeding projected demands on the state budget in subsequent years. The act should contribute to the creation of a complete tourism product, which will be competitive within the European environment. This Act regulates tourism support in the Slovak Republic, rights and obligations of natural persons and legal persons operating in the tourism sector, drafting of policy documents and tourism development funding. It is the first systemic solution of tourism which creates a legislative frame for the launch and effective operation of local and regional tourism organizations. Its main aim is to boost cooperation in the tourism sector in Slovakia by creating and supporting financially local and regional tourism organizations responsible for the development of tourism within a respective region or defined territory.

An amendment to the Act on Investment Aid No. 561/2007 Coll. was approved by the Slovak Parliament on 30 June 2011, and entered into force on 1 August 2011. This Amendment entitles the Tourism Section of the Ministry of Transport, Construction and Regional Development of the Slovak Republic to provide Investment Aid to tourism projects.

With this respect, the Ministry prepared in 2012 the **Decree No. 11/2013 Coll.** to the above mentioned Act, which set a template for investment aid for regional development in tourism, specifies the requirements for the submission of annual reports on the implementation of the investment plan, the final evaluation report and the annual report on the use of investment.

4. MEASURES AND INITIATIVES

This section provides Member States with an opportunity to outline specific initiatives and policies that are or are going to be adopted to manage and develop tourism activity in ways which respond to the key challenges of the Agenda and which fall within the six main aims of the Agenda itself.

1 Economic prosperity

- a. To ensure the long term competitiveness, viability and prosperity of tourism enterprises and destinations.

- b. To provide quality employment opportunities, offering fair pay and conditions for all employees and avoiding all forms of discrimination.

2 Social equity and cohesion

- a. To enhance the quality of life of local communities through tourism, and engage them in its planning and management
- b. To provide a safe, satisfying and fulfilling experience for visitors, available to all without discrimination by gender, race, religion, disability or in other ways.

3 Environmental and cultural protection

- a. To minimise pollution and degradation of the global and local environment and the use of scarce resources by tourism activities.
- b. To maintain and strengthen cultural richness and biodiversity and contribute to their appreciation and conservation.

4.1 Please set out, briefly, the steps which have been or will be taken, if any, to address the 7 key challenges for the delivery of sustainable and competitive tourism, covered in the TSG report and referred to in the 'Agenda'.

4.1.1 Reducing the seasonality of demand. (maximum 200 characters)

4.1.2 Addressing the impact of tourism transport. (maximum 200 characters)

4.1.3 Improving the quality of tourism jobs. (maximum 200 characters)

4.1.4 Maintaining and enhancing community prosperity and the quality of life, in the face of change. (maximum 200 characters)

4.1.5 Minimising resource use and the production of waste. (maximum 200 characters)

4.1.6 Conserving and giving value to natural and cultural heritage. (maximum 200 characters)

The Ministry of Culture of the Slovak Republic provides financial support under the grant programme "Let Us Renovate Our House". The purpose of the programme is to support protection, reconstruction and development of cultural monuments in Slovakia.

Within this grant programme, there is a sub-program called Restoration and preservation of torso architecture, which is intended to support activities related to the restoration of Slovak castles and their ruins.

4.1.7 Making holidays available to all. (maximum 200 characters)

4.2 As key challenges may change over time, please identify any other areas that are becoming a new challenge. (maximum 600 characters)

For the Tourism Section of the Ministry a key challenge is the implementation of destination management as a new conceptual change of management of tourism in Slovakia in compliance with the above mentioned Tourism support act (creation and support of destination management organizations on local, regional and national level and financial support of DMOs from the government).

The further key tasks are the approval of the Tourism Development Strategy until 2020 and introduction of a national system of quality in tourism in Slovakia.

4.3 Please identify and describe a specific initiative, which is related to the 7 key challenges, that is innovative/successful and which would be of interest to or of help to other Member States. (maximum 2.000 characters)

5. MECHANISMS FOR IMPLEMENTATION

Three mechanisms for implementing the Agenda were identified in the “Agenda”: sustainable destinations, sustainable businesses and responsible tourists.

5.1 *Sustainable destinations*: What support is given to strengthen destination management at the regional/destination level (supportive policy environment, knowledge networks, training programmes, establishment of measures/indicators for benchmarking, etc.)? (maximum 600 characters)

5.2 *Sustainable businesses*: What support is given to strengthen the sustainability and competitiveness of businesses (supportive policy environment, orientation of business support services to sustainability, training, financial incentives, etc.)? (maximum 600 characters)

5.3 *Responsible tourists*: What support is given to promote responsible choices by tourists (e.g. sustainability in education, national marketing and media campaigns, promotion of certification schemes)? (maximum 600 characters)

6. DATA AND INDICATORS

Eurostat will provide, as an annex, the key statistical data required to support the reporting process covering around 20 indicators². These are mainly related to the aim of ‘economic prosperity’.

Please, identify indicators that are being used or developed which could add to the range of information being provided by Eurostat, particularly in relation to social and environmental issues (other indicators from the TSG report, visitors/ residents satisfaction, etc.). (maximum 500 characters)

² These indicators have been selected from the 50 TSG indicators on the basis of the possibility to calculate them at the European level.

7. COMPLEMENTARY ADDITIONAL INFORMATION

If necessary use the following box to provide additional complementary information that has not already been covered.

The Government of the Slovak Republic in its Manifesto for the period 2012 – 2016 pledged to achieve the following objectives in the field of tourism:

The objective of economic policy in tourism is the fostering of competitiveness of tourism and a better use of its potential to eliminate regional disparities and create new jobs.

To achieve this goal, it will be necessary to:

- reevaluate the institutionalization of management and coordination of activities of subjects responsible for the development of tourism at all levels,
- develop a new strategy to revive tourism, increase its quality and competitiveness,
- foster a better use of touristic potential of Slovakia,
- improve the effectiveness and transparency of the use of public resources for the support of tourism development, including a more effective use of EU funds,
- consider the application of support programmes connected to active tourism for airports and airlines to directly support the development of air transport and foster the development of airline industry even within tourism.

ANNEX

STATISTICS ON TOURISM IN SLOVAKIA IN 2012/2011

INDICATOR	2011	2012	INDEX 12/11
International Tourism Receipts (mil. EUR)	1 744,7	1 789,0	102,5
International Tourism Expenditures (mil. EUR)	1 566,8	1 666,3	106,4
Balance of International Tourism (mil. EUR)	177,9	122,6	68,9
Share of Inbound Tourism on GDP (%)	2,5	2,5	100,0
Share of Inbound Tourism on Export of Services (%)	36,7	32,1	87,5
Share of Inbound Tourism on Export of Goods (%)	3,1	2,9	93,5
Share of Inbound Tourism on Export (Goods&Services)(%)	2,8	2,6	92,9
Total Number of Tourists /Accommodated Visitors/	3 571 093	3 774 062	105,7
of which: Foreign	1 460 361	1 527 500	104,6
Domestic	2 110 732	2 246 562	106,4
Total Number of Nights	10 524 738	10 908 200	103,6
of which: Foreign	4 038 635	4 101 201	101,5
Domestic	6 486 103	6 806 999	104,9
Average Length of Stay (Nights)	2,9	2,9	100,0
of which: Foreign	2,8	2,7	96,4
Domestic	3,1	3,0	96,8

Total Number of Accommodation Establishments	3 011	3 643	121,0
of which: Hotels, Motels, Boatels	616	659	107,0
Boarding Houses	681	814	119,5
Tourist Residences	297	350	117,8
Cottage Colonies	54	63	116,7
Other Collective Establ. (Camping and Others)	884	996	112,7
Private Accommodation	472	736	155,9
Total Number of Rooms	57 831	63 685	110,1
of which: Hotels, Motels, Boatels	28 013	29 124	104,0
Boarding Houses	8 195	9 797	119,5
Tourist Residences	6 257	7 352	117,5
Cottage Colonies	1 352	1 402	103,7
Other Collective Establ. (Camping and Others)	12 103	12 932	106,8
Private Accommodation	1 849	2 811	152,0
Total Number of Bed places	148 748	163 898	110,2
of which: Hotels, Motels, Boatels	64 378	67 045	104,1
Boarding Houses	21 454	25 745	120,0
Tourist Residences	18 385	21 252	115,6
Cottage Colonies	5 277	5 402	102,4
Other Collective Establ. (Camping and Others)	33 784	35 627	105,5
Private Accommodation	5 275	8 029	152,2

Source: Statistical Office of the Slovak Republic, National Bank of Slovakia