SLOVAKIA CATCHING-UP REGIONS

UNLOCKING THE ENDOGENOUS TOURISM POTENTIAL OF POLONINY NATIONAL PARK AND THE SNINA DISTRICT OF THE SLOVAK REPUBLIC

European Commission

PREŠOVSKÝ SAMOSPRÁVNY KRAJ

DEPUTY PRIME MINISTER'S OFFICE FOR INVESTMENTS AND INFORMATIZATION OF THE SLOVAK REPUBLIC

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The findings, interpretations, and conclusions expressed herein are those of the authors and do not necessarily reflect the view of the World Bank Group, its Board of Directors, or the governments they represent.

ACRONYMS AND ABBREVIATIONS

AD	Albergo Diffuso
ATTA	Adventure Travel Trade Association
CHKO	Chránené Krajské Oblasti (Nationally Protected Regions)
CURI	Catching Up Regions Initiative
DMO	Destination Management Organisation
DMS	Destination Management System
EC	European Commission
EFA	Ecological Functional Area
GDP	Gross Domestic Product
ICT	Information Communication Technologies
INTERREG	Inter-Regional Cooperation Programme of the European Union
LMT	Lebanon Mountain Trail
NOLS	National Outdoors Leadership School
NP	National Park
NPP	National Park Poloniny
OECD	Organisation for Economic Co-operation and Development
PPT	(National) Poloniny Park Trail
PSK	Prešovský Samosprávny Kraj, Presov Self-Governing Region
R-DMO	Regional Destination Management Organisation(s)
SME	Small and Medium Enterprise(s)
SSIAD	International School Specializing in the Albergo Diffuso
SR	Slovak Republic
TIC	Tourism Information Center
UNDP	United Nations Development Program
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNWTO	UN World Tourism Organization
WEF	World Economic Forum
WTP	Willingness-to-Pay
WB	World Bank
WBG	World Bank Group
WTTC	World Travel & Tourism Council

EXECUTIVE SUMMARY

This report, *Unlocking the Endogenous Tourism Potential of Poloniny National Park and Snina District of the Slovak Republic* is Output 2 of the World Bank's tourism-related support to the European Commission (EC) and the Prešov Self-Governing Region (PSK). The report examines the current tourism development and market of the PSK, focusing particularly on the lagging district of Snina and the National Park of Poloniny, and the opportunities for their improvement as potential drivers of equitable local economic growth in the PSK. It is being conducted in support of the EC's Catching Up Regions Initiative. The Report is based on fieldwork by the World Bank Group task team and provides evidence-based recommendations that will inform the PSK's future policies, strategic planning, and investments in the regional tourism development, particularly in the Snina District.

The PSK location and its unique natural and cultural heritage features make it a tourism-friendly potential destination. While these attractions draw some visitors, the neighboring East Carpathian Park areas of Bieszczady National Park in Poland and Uzhanskyi National Park in Ukraine, which share many features with Poloniny Park, attract thousands of visitors. Both Parks are more developed in terms of infrastructure and tourism offers, thus suggesting that with product improvements and infrastructure investments in the Snina District and Poloniny, tourism could be a stronger and more sustainable source of economic growth.

The Snina District and National Poloniny Park (NPP) have many challenges to address in order to realize the growth benefits of their tourism sector. With targeted public investments in infrastructure, product and marketing, human resources and selected policy actions, these benefits can be realized. While some actions are being undertaken in these areas, there is no cohesive framework.

This report recommends a set of interrelated actions to create the cohesion needed to stimulate tourism as a major economic driver for the region, which include the following:

- Designate the trail that leads to the Porta Rusica Trail as the "Poloniny Park Trail" similar to the examples profiled in this report (the Lebanon Mountain Trail and the Via Dinarica Trail).

- Assist the communities along the Trail with becoming stronger destinations through a community-driven consensus-building process similar to Italy's successful "Albergo Diffuso," which is also profiled in this report.

- Designate one or more communities as an "Adventure Center," perhaps modeled on the U.S.-based National Outdoor Leadership School wilderness activity programs and centers.

- Focus on adventure tourism activities, especially cycling, horseback riding and hiking, which do not require highly developed infrastructure. As of late April 2019, through the inter-regional cooperation Program (INTERREG) a Carpathian horseback tourism project was approved.

- Use the Regional Destination Management Organization (R-DMO) and the sub-Regional DMOs as much as possible to facilitate and coordinate these actions.

Tourism trends in the Slovak Republic (including the PSK), and surrounding countries, are moving in a positive direction in terms of the total international and domestic (certainly for the Slovak Republic) arrivals and spending, as well as the growing popularity of experiential travel. Although the estimated 15,000 visitors to National Park Poloniny (NPP) annually make up a tiny fraction of the national and regional tourism, the Snina District and Poloniny have the cultural and natural features to offer more.[1]

STRENGTHS AND OPPORTUNITIES

Some of the strongest, most positive features of tourism in Snina District include:

- Tourism growth in districts west of the Snina District is potentially a positive sign for Snina and (NPP).

- Rich cultural legacies with 56[2] national cultural monuments such as the 27 old wooden churches, open-air folk museums, folklore performances, and crafts demonstrations.

- "Wild Nature" national parks and protected areas, particularly the UNESCO protected beech forests and the "Dark Sky Park" around the Kolonica Astronomical Observatory.

- Extensive 200 plus kilometers network of hiking/horseback riding (152,5 km) and cycling trails (281,5 km), with restoration work underway on the Porta Rusica portion of the trail connecting with Poland. The NPP has the potential of becoming a major cycling destination.

- Under-tapped potential as an important birding destination.

- Tourists in the Snina District are predominantly Slovak, but the Czech, Polish, Austrian, and German markets are also important. Nearly two-thirds of domestic travelers are engaged in recreation and leisure on longer trips, and one third in sports on short trips.

- Substantial official municipal and regional level interest in tourism demonstrated by the proliferation of strategies and plans. However, the coordinated capacity to implement, is lacking.

- Entrepreneurial spirit exists, albeit among just a few local entrepreneurs, such as the Mini Zoo and the Vihorlat Resort. The observatory director also demonstrated an entrepreneurial approach to attracting visitors.

- The Regional DMO and local representative offices (reporting to the Regional DMO) provide a potential framework for more cohesive action on tourism.

- Over 100 Slovak and international movies have been filmed in the Slovak Republic—an untapped opportunity for international marketing.

- Positive national level indicators for the business environment on the World Bank's *Doing Business Report 2019* rankings and the World Economic Forum's (WEF) *Global Competitiveness and Travel and Tourism Competitiveness Index*. However, these positive indicators are countered by some serious negative indicators (see below). As described below, discussions with local PSK and Snina District stakeholders underscored the relevance of these indicators.

- Positive economic impact from tourism at a national level; sub-national economic impact data is lacking. The increasing number of visitors to the PSK is an encouraging sign.

WEAKNESSES AND CHALLENGES

The Snina District and National Poloniny Park are beset with weaknesses and challenges that have stalled development of the local economy. These challenges counter some of the strengths mentioned above:

- Improved accommodations and restaurants needed in the Snina District.
- Visitor rest areas with toilets lacking at sites.
- Trail upgrades, regular maintenance and better information needed.
- Road improvements needed for selected areas in the District and Park, including border crossings with Poland.
- Sewage and potable water connectivity and solid waste collection should be improved for most municipalities in Snina District.
- Dark Sky Park stargazing is barely marketed; missed opportunity for hundreds of thousands of amateur astronomers and dark sky stargazing fans.
- International and probably some domestic travel media and operators unaware of natural and cultural attractions of Snina District.
- Depopulation due to a lack of opportunities and aging population is handicapping growth and entrepreneurship.
- Cultural heritage under threat of disappearing as depopulation continues.
- The SR ranked 100 or worse on several key WEF Tourism Competitiveness indicators, which counter the positive indicators mentioned above, the worst being: business environment (115 out of 136), efficiency of legal framework in settling disputes and challenging regulations (135 and 131), time required for construction permits (127), and effect of taxation on work incentives (134).

Some of these challenges are being addressed – for example, the Porta Rusica Trail section is being improved, road improvements are planned, and action on water supply is also planned. The proliferation of tourism-related strategies and plans, at a minimum, signals significant interest in tourism. The proposed consolidation of sub-regional DMOs into one Regional DMO also offers a potential framework for cohesion and implementation.

So far, action on tourism is disparate and scattered among the multiple communities and natural/cultural sites, lacking a cohesive, unifying approach. In short, the Snina District, and NPP in particular, are not appearing as a distinct tourist destination. Several international examples are introduced, aspects of which provide valuable lessons and best practices of destination cohesion. These include:

- **The Albergo Diffuso Model** – Creating **intra-community cohesion** for reviving declining villages as destinations.
- **The Lebanon Mountain Trail** – Creating **inter-community cohesion** via a linked series of cooperating communities that becomes a cohesive branded and thus more marketable destination. This model also includes assistance to local communities for revenue-generating activities, such as training for guides and cooking demonstrations.

- **The Via Dinarica Trails** – Inspiring private sector cooperation on joint marketing and capacity building for multi-country itineraries, thus helping to strengthen private sector driven cohesion.

- **Wild Nature Approach** – Demonstrating that untouched or wild nature has important economic value for communities.

- **Adventure Center** – Creating a focal point along the trail in one of the communities that becomes an adventure center, perhaps based on the U.S.-based National Outdoor Leadership School. The latter can also help generate leadership and team building for cohesion and further tourism development.

In addition to the above recommendations, this report also recommended the following:

Policy and Actions for Country Financing

1. Establish a local stakeholder process for increased cohesion, consensus and generation of joint creative ideas to expand tourism offers.

2. An outreach plan to engage media and operators.

3. Establish an improved data collection system for market research.

4. Create and/or adapt an existing tourism development training program for public officials.

5. Develop and implement a plan for targeted tourism marketing, with an emphasis on digital marketing and leveraging film production for destination marketing.

Investment Opportunities under the European Structural and Investment Funds

1. Create the Poloniny Park Trail (PPT) by designating existing portions as parts of the PPT.

2. Use existing transport infrastructure strategically and focus on those parts that benefit the most people and leveraging the "scarcity effect" of driving up values.

3. Advance investments on waste management and water supply for community health and safety.

Investment opportunities under Cohesion Policy Programing Period 2021 – 2027

For the tourism-related development needs of the Snina District and NPP, Policy Objective 5 (PO5) of the Cohesion Policy is especially relevant. PO5 is described as "A Europe closer to citizens by fostering the sustainable and integrated development of urban, rural and coastal areas and local initiatives." As mentioned above, increased cohesion within and among communities is needed to advance tourism development in the Snina District. In addition, by investing in recommendations, such as the adaptation of the Albergo Diffuso concept and the Lebanon Mountain Trail, this cohesion can be strengthened. With investment in training for public officials and filling the infrastructure gaps, PO5 objectives can be realized, and tourism can become a more important force for economic growth in the region.

INTRODUCTION AND BACKGROUND

This Output 2 Report is the second of two reports conducted in the framework of the Catching Up Regions Initiative (CURI) in the PSK. The Output 1 Report provided useful overall context for assisting the tourism sector in the PSK, which is also directly relevant to this report. The following is a reiteration of this context:

> In early 2018, the European Commission (EC) launched the Catching Up Regions Initiative (CURI) in PSK. While Prešov is the largest region in Slovakia population-wise and its GDP is rapidly growing, its regional development and per capita income indicators remain well under the EU and Slovak average. Evidence of brain drain, high unemployment rates, especially for young people, social exclusion, mismatch between the education supply and demands of the local labor market, lack of cooperation in the fields of innovation, underutilization of financial resources and structural funds are some challenges that currently hamper Prešov's economic development.
>
> In the framework of the CURI initiative[3] , the EC seeks to assist EU Member States and regions to better invest and manage Cohesion Policy funds for more inclusive and equitable socio-economic growth[4] (see MEMO 15/4654). In partnership with Slovak national authorities, the EC has commissioned the World Bank Group to provide tailored support to PSK and local stakeholders. By early 2018, the partnership was agreed on in order to design and implement a solid, multi-sectoral analysis and action plan for economic transformation of PSK. This includes a series of recommendations for measures of reforms in order to improve the local investment environment and identification of tailored investments to enhance the region's economic competitiveness [...].

Local communities in and around the NPP area are interested in developing sustainable tourism. From initial research, the area seems to offer some interesting potential activities for development, mostly related to adventure and ecotourism as well as some natural, cultural sights and activities. However, infrastructure and labor seem to be lacking to fully develop the sector in and around the NPP. This report reviews and analyzes the tourism situation of the NPP and region, in terms of existing strengths and weaknesses, and possible opportunities for development. This analysis will cover the four main development areas of need: infrastructure, tourism products and marketing, human resources (including availability of labor, education and training) and policy/investment climate. Based on the analysis, recommendations are offered about the establishment of sustainable tourism in the Snina District and the NPP.

PURPOSE AND SCOPE OF THE REPORT

Why Focus on the Snina District and the National Poloniny Park

The Snina District and NPP are some of the least visited and least developed areas of the PSK and the eastern Slovak Republic. From the document review, as well as discussions with stakeholders, opportunities for further tourism development and related investment are limited. With the district's main economic driver as forestry, little, if any, expansion is possible beyond its current production levels, thus limiting further employment in this sector. According to Peter Šiška, Director of the State Forestry and Agriculture Enterprise, the main employer in the district, 200 local residents are employed directly by the enterprise and another 100 indirectly, thus

supporting 300 families and an estimated 600 residents. While Prešov has a rapidly growing GDP, according to the *Snina District Development Action Plan (2019 - 2023)* and as reported in Output 1[5], its regional development and per capita income indicators remain well under the EU and Slovak average. "[B]rain drain, high unemployment rates, especially for young people, social exclusion, mismatch between the education supply and demands of the local labor market, lack of cooperation in the fields of innovation, underutilization of financial resources and structural funds are some challenges that currently hamper Prešov region's economic development."[6]

On the positive side, the District has multiple nature-based and cultural tourism attractions and opportunities. With improved infrastructure, product offers, and marketing, these attractions could attract more visitors, and thus generate more local employment and incomes, especially as the economy in other parts of the PSK grows. Prešov, for example, is growing rapidly, according to the Snina District Development Action Plan (2019-2023).[7]

National Park Poloniny is included in the European Network of Protected Areas (Natura 2000), is part of the East Carpathian Biosphere Reserve (UNESCO Biosphere Network), and was awarded the European Diploma for Protected Areas – all important designations for further development.[8] The Park, according to its UNESCO Management Plan, is one of the most attractive parts of the Slovak Republic for tourism. The Plan especially highlights opportunities for hiking, cycling, tenting, camping, as well as cross-country skiing, horseback riding, paragliding, and hang gliding.[9] The Plan also highlights multiple cultural heritage and religious sites, including wooden churches, monuments, archaeological sites, war monuments and cemeteries.[10]

SUMMARY OF THE TOURISM SITUATION IN THE SLOVAK REPUBLIC, THE PSK AND IN THE SNINA DISTRICT

Tourist Arrivals and Spending

The Slovak Republic has been growing as both an international and domestic destination over the past decade, placing it 43rd in the number of international arrivals. The outlook for international and domestic tourism is bright for the country as a whole.

Since 2005, according to the United Nations World Tourism Organization (UNWTO), international tourist arrivals to the Slovak Republic have grown from 6,2 million to 7,6 million by 2016. International visitor spending has more than doubled from € 1,07 billion in 2005 to nearly €2,7 billion by 2017.[11] By 2029, the World Travel & Tourism Council estimates that foreign spending on tourism in the Slovak Republic will increase by two-thirds to € 4,4 billion.[12]

Domestically, the tourism situation has been even brighter with UNWTO reporting 7.1 million trips for 2017, an increase of nearly 50% since 2013.[13] Since 2005, domestic tourism spending has grown from €1,1 billion to €2,5 billion and is forecasted to increase to €3,5 billion by 2029.

This tourism performance, however, has varied substantially among the eight regions of the country. The following table shows, by region, the number of visitors in tourist accommodation establishments for 2018:

TABLE 1 Visitors by region in accommodations, 2018

Region	Number of visitors	Number of domestic visitors	Number of foreign visitors
Bratislavský	1,460,130	510,662	949,468
Žilinský	1,119,677	738,584	381,093
Prešovský	932,121	646,896	285,225
Banskobystrický	627,660	524,627	103,033
Košický	386,088	250,658	135,430
Trenčiansky	370,034	259,800	110,234
Trnavský	365,027	207,171	157,856
Nitriansky	335,670	201,982	133,688
TOTAL	**5,596,407**	**3,340,380**	**2,256,027**

Source: Vývoj cestovného ruchu v ubytovacích zariadeniach SR (Tourism Development in Accommodation Establishments in the SR), Slovak Republic Statistical Office, February 2019.

As Table 1 shows, a quarter of the country's tourism is concentrated in Bratislava followed by the Žilinský Region, with the popular High Tatra Mountains accounting for much of the demand, then followed by the Prešov Region. Over the past decade, the number of visitors to Bratislava and the Žilinský Region has nearly doubled. In Prešov, the number has increased by nearly 60%.

Within the Prešov Region, nearly half of all visits were concentrated in Poprad District, while Snina District accounted for only about 1% of total tourism with very little growth since 2009 (from 5009 to 5196 visits in 2018). Notably, tourism increased at least 50% from 2009 to 2018 in the Districts of Poprad, Kežmarok, Prešov, Bardejov, Stará Ľubovňa, Humenné, Vranov nad Topľou, and Levoča. So, while growth numbers for Snina appeared to be static, it is a positive sign that tourism grew substantially in these nearby districts over the past decade. Visitors to these other districts could eventually add the Snina District, including NP Poloniny.[14]

Tourism Product Offers

Existing regional and district-level strategy and planning documents—*PSK's Regional Strategy for Economic and Social Development 2014-2020*, the *Snina District Development Action Plan* (Akčný Plán Rozvoja Okresu Snina 2019-2023), and the Output 1 PSK/World Bank Report – provided useful descriptions of the principal product offers. The competitiveness of these offers is discussed in more detail in the sections below. The following is a summary of the highlights of these offers from the documents and stakeholder discussions:

Cultural attractions

The PSK region offers a rich cultural heritage that includes castles, archaeological sites, military memorials, Jewish cemeteries, centuries of old wooden churches, and four open-air folk museums. The Snina District alone, which includes the villages of NP Poloniny, contains 56 national cultural monuments and the Vihorlat, Polina and Šiňava[15] Folklore ensembles, pilgrimage sites, as well as other cultural sites, including some that present Ruthenian and Roma culture. Seasonal events, such as Topol'a and New Sedlica that are connected with Christmas (Christos Razhdajetsja), along with occasional demonstrations of traditional weaving, wood carving, and pottery by the "DO Fénix" children's organization in Snina town, are also attractions.[16]

As an indicator of local interest in tourism, in the town of Snina, Mayor Daniela Galandova led a tourism stakeholder session that included local craftsmen, such as Jaroslav, who makes traditional thatched roofs, a traditional wood furniture artisan, and Vladimir, who makes traditional musical instruments.

Nature-based attractions

The PSK Region is also well endowed with multiple nature-based attractions and sites, that draw both domestic and foreign visitors. These sites include five national parks[17] , 180 protected areas, nature reserves, UNESCO protected beech forests, geothermal springs, the astronomical observatory near Kolonica, and beekeeping operations. The NPP, along with the neighbouring parks of, Bieszczadski National Park in Poland and "ukrajinský Užansky Nacionaľny Pryrodny" Park in Ukraine, offer opportunities for transnational park and tourism cooperation, particularly for extended hiking and biking trails, which can be a good selling point. Although infrastructure is lacking in the park – especially accommodations, improved trails and roads – it could be considered an adventure destination and perhaps positioned as a wild nature destination and a center for adventure competitions and activities. However, the park is also potentially competing with these other parks, so Poloniny's unique selling qualities need to be better marketed. The PSK region is also known for its well-developed spa towns and resorts, such as Bardejov and Bardejovské Kúpele, Vysoké Tatry (climatic spa), Vyšné Ružbachy, as well as the Zemplínske Hámre swimming complex and Sninské rybníky bioswimming pool which are on the outskirts of the Snina city.

Accommodations

Accommodations are at the core of tourism offers, and for some destinations, are the central reason for visiting. In the PSK, as of 2018, there were 728 accommodation facilities with 10,969 rooms and 32,750 beds, an increase of 2.3% over 2017. As of 2018, the Snina District had 1602 beds registered in 23 accommodation facilities with over 100 beds in at least 10 facilities in the park area. Near Snina town, the Hotel Kamei and the Hotel Bystrá are well-situated adjacent to the bio natural swimming pool *Sninské Rybníky*, which attract a steady flow of visitors during its opening season of June to September. The nearby Vihorlat Resort has managed to extend the season by marketing to small conference groups, children's educational travel groups, and weekend weddings. A property such as the nine room, 30-person capacity Penzión Poloniny in Ulič, is reportedly full during the same period, attracting mostly visitors coming for the NPP, including hikers and cyclists. Overall, however, local tourism stakeholders, such as the Mayor Ján Holinka of Ulič, cited the lack of quality accommodations as a constraint on tourism growth in the District of Snina and NPP. This is especially true during the high season summer months, but seasonality is also an issue, with tourism very low during the rest of the year, which is partially the result of a lack of more developed multi-season product opportunities.

According to data from the National Statistical Office, for the Snina District, the average annual occupancy rate was 12%, and for accommodations in the park communities, 7.1%. Both rates, however, are incomplete, since they do not represent accommodations in all the municipalities in the Snina District and the NPP. Regardless, they point to a stark contrast between occupancy in the summer versus the rest of year, since the summer months are reportedly at capacity, thus underscoring the need to extend the tourism season through further product development and marketing.

Existing Demand for Tourism Products

Data on demand for the Snina District and National Park Poloniny (NPP) attractions is mainly limited to accommodations data, which has been cited above. Adding to this data, are figures from a local survey showing that demand for accommodations in the Snina District is dominated by the Slovak Republic (77%), the Czech Republic (8%), Poland (4%) and the Ukraine (3%). The data also showed that occupancy is markedly seasonal, mostly from May to September.

The Snina District Development Action Plan 2019-2023 reported that NPP is the least visited of the Slovak Republic's National Parks, even though the park offers opportunities for visiting multiple cultural monuments, bird watching, seeing bears and wolves, and a network of hiking and biking trails through the villages and the park grounds. Furthermore, its Carpathian Beech Forests have been designated a World Heritage asset. The plan also reported that the park attracts approximately 15,000 tourists annually, mainly from the SR and Poland. Contrast this total, with the over 487,000 visitors that Bieszczady National Park, just across the Polish border, attracted between April and November 2017.[18]

The plan reported 15,000 tourists in the park, which by UN World Tourism Organization's definition are overnight visitors, but overnight stays totaled 5,196 in 2018 for the entire Snina District.[19] So, the tourists were probably mostly day visitors, which given the lack of data, are difficult to count. The distinction is important for understanding the current market for the park.

Regardless of whether the total is only a maximum of 15,000 tourists, trends for both the domestic and inbound foreign tourism, bode well for the further potential development of tourism in the Snina District and NPP. Domestic trips for holidays, leisure, and recreation (in the SR) increased from 2,2 million in 2013 to 3,5 million in 2017.[20] For longer-term domestic trips, the purpose of travel was reportedly recreation and leisure (62%), visiting relatives (24%), and other activities (14%). During shorter-term domestic trips, 50% of Slovaks visited relatives and friends, 32% engaged in recreational activities and sports, while 7,8% enjoyed leisure activities, such as wellness, agritourism (3%) and cultural events (2%).[21] As Table 2 indicates, most domestic tourists visited the well-developed recreational destinations of Poprad and Liptovský Mikuláš districts. The high percentages of domestic interest in recreation and leisure—62% for longer-term domestic trips and 32% for shorter-term—are positive indicators for what Snina and Poloniny have, and could offer, with improved infrastructure.

According to Ministry of Transportation statistics, derived from SIM card use, 85,915 international tourists visited the Snina District in 2016. The highest number came from Poland, the Czech Republic, Austria, Ukraine, and the Netherlands (see Table 2 below). Again, given that overnight visitors totaled 5,196 in 2018 (as stated above), this data may be reporting day visitors only, and not tourists staying for two nights.[22]

TABLE 2 Foreign visitors to the Prešov Region and the Snina District (duration of stay – a minimum of 2 days)

Tourist flows from	Number of tourists in the PSK	Number of tourists in the Snina District	% of visitors from that country visiting the PSK
Poland	1,882,084	23,596	1.25
Czech Republic	797,101	22,347	2.8
Austria	116,265	4 ,620	4
Ukraine	134,548	4,156	3.1
Germany	190,254	3,246	1.7
Netherlands	89,206	1,919	2.2
Russian Federation	88,317	1,310	1.4
Romania	167,301	1,076	0.6

Source: Ministry of Transport and Construction of the Slovak Republic - mobile operators' statistics 2016.

Again, regardless of the actual totals, the data does demonstrate international visitor demand for the PSK and the Snina District.

TABLE 3 Destination preferences of domestic tourists in 2015 in selected districts of the Slovak Republic

Short and long-term stays	Number of trips	Number of nights	Average number of nights
Poprad (PSK)	770,418	3,081,001	4
Liptovský Mikuláš	313,178	1,319,788	4.2
Bratislava I-V	403,887	1,061,211	2.6
Trenčín	144,827	782,544	5.4
Žilina	215,576	647,165	3
Other	2,888,965	11,419,952	N/A

Source: Ministry of Transport and Construction, Slovak Republic (2015)
Note: The Ministry of Transport and Construction reported higher arrivals and overnight stays in the Snina District than what the accommodations data from the Statistics Office shows. The discrepancies merit a closer examination of data sources and methodologies in future research.

Governance, Policy and Planning Dimensions

Since at least 1991, the World Bank has defined good governance as "the manner in which power is exercised in the management of a country's economic and social resources for development."[23] In practice, this means quality public administration and management, in policymaking and implementation, for the provision of public services, which the European Commission summarizes clearly in their technical paper *Promoting Good Governance*:

> [...] an efficient and productive public sector can be a strong driver of economic growth through its support for and governance of the private sector. An effective public administration is a key element of the competitiveness of the EU economy, supporting measures to reduce the administrative burden on individuals and SMEs... weak administrative and judicial capacity as well as legal uncertainty constitute key impediments in addressing economic development challenges.[24]

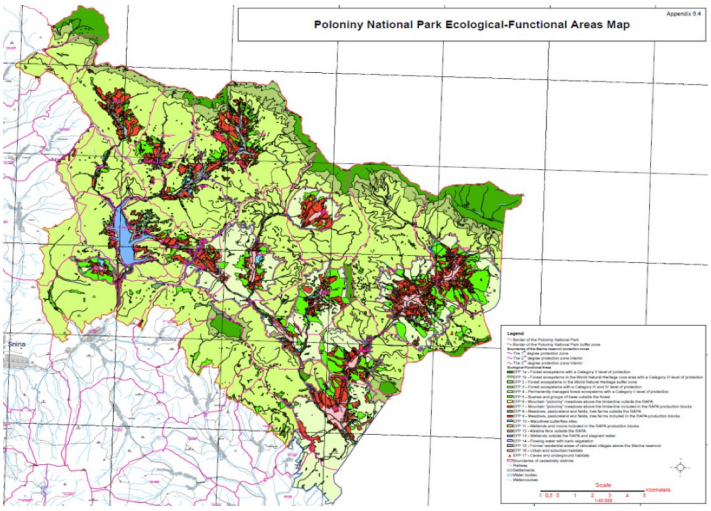
This applies to all levels of government and governing, and all sectors—especially tourism—which is interlinked with nearly all aspects of a country's economy and society. This is evident in the Slovak Republic and the PSK, particularly in the Snina District and NPP, where layers of policy, plans and strategies exist to boost tourism development. Having these documents and a regional Destination Management Organization (DMO) with sub-regional DMOs is helpful for policy coordination, planning and marketing. However, implementation is lagging and appears to be lacking coordination between levels. For investors, both foreign and local, as well as entrepreneurs, the result is a burdensome and costly regulatory environment that discourages investment and business growth. Nevertheless, there are a handful of local investors and entrepreneurs in tourism-related ventures (see below) who managed to establish and sustain their operations, but would do even better under improved circumstances, thus stimulating even more development.

In the Snina District, these issues were apparent in at least two main ways. While the National Poloniny Park Management Plan delineates 17 Ecologically Functional Areas (EFA) throughout the park,[25] the Action Plan for the Development of the Snina District (2019-2023) explained that park management is unclear and uncoordinated between government agencies:

> [P]rotected areas [of Snina District] (including the UNESCO Carpathian Beech Forest [areas]) are not managed by cross-departmental departments but independently from the Ministry of Agriculture and Rural Development of the Slovak Republic (forestry and agriculture), Ministry of Environment SR(nature and landscape protection), Ministry of Defense SR(military sites Vihorlat forests), Ministry of Interior SR (state border protection) and the Ministry of Transport and Construction SR (accessibility, cycling [trails] and tourism).[26]

Secondly, for investors and microenterprises wanting to launch or expand their business, the business climate is unfavorable both in terms of a lack of incentives and excessive regulation. This climate is not helped by the fact that, as the Snina Action Plan (2019-2023) emphasizes, "[...] a number of legal regulations affecting this territory are not mutually harmonized (Act No 543/2012 on Nature and Landscape Protection, Act No 326/2015 on forests, and other acts)." Nor are the existing rules for park management well enforced or implemented. The plan cites "the unauthorized entry of four-wheelers, motorcycles and other vehicles into protected areas [near hiking trails]," as a problem that impinges on the more tranquil, nature-based visitor experiences.

FIGURE 1 National Park Poloniny ecological function areas



Source: Poloniny National Park Management Plan for 2017 – 2026. Appendix 6.4.201604, Poloniny National Park Management Plan for 2017 – 2026, State Nature Conservancy of the Slovak Republic, Banská Bystrica, Poloniny NP Administration, Stakčín.

METHODOLOGY

This report is based on a field visit to Prešov, the Snina District and NPP, from March 4-9, 2019, during which extensive meetings were conducted with more than 18 tourism-related public and private sector stakeholders both individually and in group sessions. It is also based on a review of multiple strategies, plans, and background documents related to tourism and sustainable development in the SR, the PSK, Snina District and NPP, as well as tourism statistics and reports from national and international sources (See Sub-Section 2.2.3 below for the full list).

STRENGTHS AND OPPORTUNITIES: THE CASE FOR INTEGRATED SUSTAINABLE TOURISM DEVELOPMENT IN THE SNINA DISTRICT AND NATIONAL POLONINY PARK

INFRASTRUCTURE

Despite infrastructure gaps, which are described below, there are a few promising developments, which could boost existing tourism demand in the Snina District and NPP as they are further developed:

- A road network exists, some of which is paved, connecting most of the villages in the NPP area with work underway for some improvements.
- An extensive network of cycling, horseback riding and hiking trails connects most of the villages throughout the park with other destinations in the Snina District, as well as with the historic Porta Rusica Trail connecting Poland and the SR.
- Tourist Information Centers (TIC) have been established in several localities, which provide brochures, postcards and occasional in-person assistance.
- Accommodation infrastructure is underused from October to May; thus space is available to serve new or expanded activities and demand during this period.
- The now-defunct ski chairlift at Ulič was reportedly once popular and could be a local investment opportunity.
- Infrastructure gaps make Poloniny a destination for more adventurous visitors for whom less infrastructure could mean more attractive, challenging experiences and events.

PRODUCT AND MARKETING

FIGURE 2 Poloniny National Park Facebook and Instagram pages

As described below, the Prešov region, particularly Snina District and Poloniny, offer some elements of Product, Place, Price and Promotion (the four Ps of Marketing)[27]. Some competitive nature-based and cultural products, especially suitable for an adventure-seeking visitor, are available at relatively low cost and distributed in many of the villages in and around the UNESCO World Heritage and Biosphere Park areas.

Promotion—the fourth P—The Snina District and Poloniny are promoted through an assortment of printed materials, some official webpages, various official and visitor-placed postings, and multimedia via Facebook, Instagram and/or Twitter feeds. Enough is posted online to provide a base upon which to expand

BOX 1 Additional destination marketing 'Ps' to consider

David Edgell and Brian Hill added new Ps in their book: Best Practices for International Tourism Development for Rural Communities:

- Partnership - concepts between marketing connections, key shareholders, management and consumers
- Packaging – the collection of services into one synchronized compact product for the complete product involved. Using ICT tools to reinvent the packaging to a much more individually-focused activity, offering great purchase opportunities for principals and intermediaries, and enhancing the total quality of the final product
- Programing - one way to add value to the standard product and to distinguish a particular offering from competitors is to offer exclusive programing, a practice known as service marketing. Customers will purchase a product that caters to their particular interests. Special programing can address such preferences and draw in additional customers
- Positioning – differentiating the product in the market
- People - the people who provide the services are a key to the success of the transaction. Operators must have a top-level service to complete the sale and encourage repeat customers
- Planning – strategic marketing plan as part of a business plan.

domestic and international marketing that is more integrated with other national and regional marketing efforts. Because online global destination marketing is highly competitive, attention to this area needs to be a priority.

In addition to these key marketing elements, there are several others that are sometimes factored into destination marketing plans. See Box 1 for the list.

The above list in Box 1, and the four Ps mentioned above[28], are all elements that should be included in the marketing plan that comprises one of the main recommendations of this report.

Competitive Product Offers

The Snina District and the National Poloniny Park offer nature-based and cultural experiences and attractions that, given international demand trends, could become genuinely competitive, if they are further developed. Both sets of activities are increasingly considered experiential travel, travel that is immersive, local, authentic, active and/or adventurous, that is, traveling to experience nature-based and cultural adventure. In fact, a 2018 study from the Adventure Travel Trade Association (ATTA) found that "experiencing a new culture" is now often included in the definition of adventure travel. So, when considering adventure travel demand, it is often combined with cultural tourism as experiential travel. This trend also creates opportunities for new small and medium enterprises (SMEs) to provide experiences, particularly when adventure is combined with cultural heritage experiences that are immersive and authentic. An estimated 90% of providers are smaller businesses. Many adventure travelers want cultural experiences as part of their adventures, and vice versa for cultural travelers.

According to the ATTA research, the adventure and nature-based travel industry is now worth more than € 614 billion and since 2012 has been growing approximately at a 21% Compound Annual Growth Rate (CAGR). Furthermore, in the 2017 ATTA Adventure Pulse, a survey of leading adventure tour operators, the most demanded outdoor activities were hiking and biking, a finding that bodes well for the Snina District and NPP.

In addition, while the research found that experiential travel (both nature and culture-based) have a broad appeal, the highest level of interest is especially among young people – Millennials or Generation Y (born between 1981 and 2000) and Generation Z (born between 2001 and 2019). If experiences are developed to appeal to these age groups, there might also be increased interest to pursue entrepreneurial experience-based businesses and opportunities in the Snina District and NPP, thus reversing the depopulation trend.

Some other highlights from the research include:

- Hiking appeals strongly across a broad age range from 25 to 65 years, especially professionals and affluent families.
- Hiking especially appeals as a soft adventure offer when combined with cultural visits.
- Biking is also increasingly attractive to a wide age group from 25 to 65.

Hiking tops the list of preferred activities in the Snina District. According to the Snina Action Plan (2019-2023), the most frequent reason for visiting the district is hiking in the National Park Poloniny and Vihorlat "Protected Landscape Area" (CHKO), which is especially popular among the most numerous visitors—Slovaks, Czechs and Polish tourists—who comprise 90% of all visitors.[29] In the 2012 European Parliament Study on Cycling – the most recent that could be found at the time of writing – the Slovak Republic and Poland were ranked medium-high and the Czech Republic ranked medium among EU countries for cycling demand.[30]

With over 27,000 hectares of forest (in NPP), an extensive network of hiking, horseback riding and biking trails, an internationally known "Dark Sky Park" (at the edge of Poloniny), and multiple cultural monuments, sites and institutions in their communities, the Snina District and the NPP could be benefiting more from the growing global demand for experiential travel.

Adventure and nature-based travel

The PSK has the largest number of protected areas in the Slovak Republic, which the PSK's Regional Program for Socio-Economic Development (PHSR 2014-2020) emphasizes as offering a "combination of rich cultural and natural heritage [that] cannot be found in such extent in any other Slovak region and therefore generates great potential for the development of the region."[31] Forests occupy 63% of the Snina District, thus totaling 51,172 hectares, with 27,248 hectares in NPP, and 8,133 hectares in a high protection zone. Of this forested area, an estimated 65% is primeval Carpathian beech trees, some reaching 56 meters high, the tallest in the world.[32] This forest was inscribed as a World Heritage Site in 2007. The Park is also home to 3,600 species of invertebrates, 320 species of vertebrates, including 211 species of birds, 24 fish species, 924 butterfly species and 63 mammal species.[33] The Snina District and the National Park Poloniny currently generate some, albeit limited, demand for adventure and nature-based travel. Their core offers for this sector include:

- Over 200 kilometers of hiking, riding and cycling trails in the Snina District
- Bird watching, especially the twitching Ural owl, woodpecker and hazel grouse
- Wildlife viewing of bison, bears, and wolves
- Astronomical tourism

As mentioned above, the most frequent reason for visiting the district is hiking in the NPP and CHKO Vihorlat areas, which is especially popular among the most numerous visitors—Slovaks, Czechs and Polish tourists—who comprise 90% of all visitors.[34] The Astronomical Observatory is also popular.

However, from discussions with stakeholders, it seems that the number of day visitors to the NPP for hikes and cycling trips might be higher than the 15,000 reported above. The owner/manager of the Snina-based Vihorlat Resort, Ladislav Jurpak, recounted, for example, seeing steady streams of guests from the Czech Republic and Germany who take day hikes in the NPP.

Hiking, horseback riding and cycling

The Snina District and NPP offer an extensive network of hiking, horseback riding and cycling trails, which could be the basis for a main thematic trail and adventure center similar to the Lebanon Mountain Trail (LMT), and the National Outdoor Leadership School (NOLS) (see below, in Relevant Best Practices and Recommendations).

The Snina Action Plan (2019-2023) reports that the district offers 152.5 kilometers of marked hiking trails among 12 routes, which are maintained and demarcated by the Humenné branch of the 20,000-member non-profit Slovak Tourist Club. The trails pass through and/or connect every village in Poloniny, as well as the town of Snina, Stakčin and other communities in the district. In addition, some of the trails could also be used for horseback riding as well.

The district also hosts eight main cycling trails totaling 281.5 kilometers, two of which connect the Slovak Republic (SR) with Poland and the Ukraine, and one that connects the SR with the Ukraine. These include the Carpathian Cycling Route project with 65 kilometers in the Snina District and along the edge of the NPP, and the Green Route with 52 kilometers also in the district and park. In fact, as local cycling expert, Viera Štupáková, explained, the Green Route overlaps and connects with the Porta Rusica Trail (See Box 2), which was approved for €1,6 million in funding for trail improvements.[35] In addition, the Carpathian Trail is a five-country project that Štupáková has been working on since

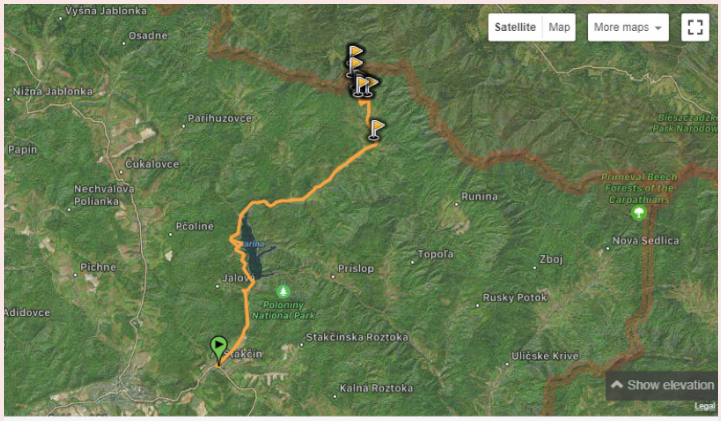
FIGURE 3 **Carpathian Cycling Trail**

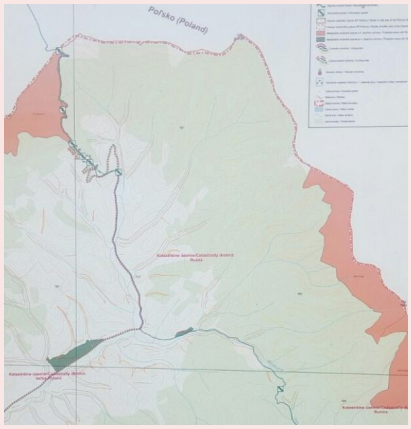
FIGURE 4 **The Eastern Slovak Cycling Network**

Source: www.bikemap.com

BOX 2 The Porta Rusica Trail: Connecting Poloniny and Bieszczady

In December 2018, the European Regional Development Fund provided almost €1.6 million to improve almost 60 kilometers of the Porta Rusica Trail. It is built on the 19th century Transcarpathian trade route that connected Michalovce and the Polish city of Baligród. The Trail will now connect Poloniny with Bieszczady in Poland and offer improved cross-border cycling along with infrastructure (educational boards, shelters, and lookout towers). Mobile applications will also be created, including interactive maps of bike paths and websites with QR codes and publications promoting border potential (maps and albums). In addition, international educational and cultural activities promoting sustainable cycling are planned, such as: conferences, cycling races, local community training, the publication of guides in Polish and Slovak, and a series of activities. This is one of 11 cross-border cooperation projects approved in 2018.





Government of the Slovak Republic, Projekt Porta Rusica - z Polonín do Bieščad, 27 December 2018.

1998. (See Figure 3 below.) The other trails connect cultural sites of interest, one of which connects artistic sites and is 18 kilometers long; the other, known as the Icon Trail, is 61 kilometers long. In addition, as Štupáková explained, another cycling trail network exists that extends east of Prešov to the Snina District, and then into NPP (See Figure 4 below).

Birdwatching opportunities and demand

Birdwatching offers potential for further development in the Snina District. With over 15,000 hectares of protected bird areas and 211 bird species[36] , the district could become an optimal area for birdwatching. According to the Poloniny National Park Management Plan, the park includes 62% of the bird species of the Slovak Republic. The plan states that the park's avifauna includes three critically endangered, 10 endangered, 15 vulnerable and 38 lower-risk species. The Starina reservoir construction helped create good conditions for the breeding of several rare bird species and aquatic birds; it also is located on a significant migratory route to the south and back, across the Eastern Carpathians between Poland and the Ukraine.[37] Global demand for birding is assumed to be substantial, but data on the number of birdwatchers is unclear; estimates are in the tens of millions. In the United States, the U.S. Fish and Wildlife Service estimated that there were 47 million birders in the country alone, people who "have either taken a trip one mile or more from home for the primary purpose of observing birds and/or closely observed or tried to identify birds around the home." They estimated that with this group "the higher the income and education level the more likely a person is to be a birder." Birders spent an estimated €13,5 billion on their trips and €23,4 billion on equipment in 2011.[38] The United Kingdom is home to Europe's largest bird organization, the Royal Society for the Protection of Birds, which has more than 1 million members. The Society estimates that 6 million U.K. residents regularly engage in birding and 50 British tour operators offer birdwatching tours.[39]

In neighboring countries, there are numerous birding organizations and tour operators specializing in birding, but demand is not of the same magnitude as in the United Kingdom and the United States. In Poland, for example, a popular birding site, Fatbirder.com, estimates that there are only 3,000 birdwatchers and ornithologists, and six specialized birding tour operators.[40] In the Ukraine, Fatbirder.com estimates that there are about 14,000 birdwatchers and ornithologists and two birding

operators.[41] In the Czech Republic, Fatbirder.com lists four main tour operators for birding tours, but does not estimate the number of local birders. For Austria (home of Swarovski, manufacturer of the best binoculars for birding), and Germany, Fatbirder.com states that "birdwatching is not the Volkssport or national pastime that it is in the UK."[42] In Germany, the site notes that the numbers are continually increasing.

Reaching birders requires targeted marketing, especially via social media, as well as traditional print and video media. Hosting familiarization birding tours for media and specialized tour operators in Poloniny will result in increased coverage and visitors.

Other park activities

The National Park Poloniny also offers the following activities:

- Cross-country skiing on trails
- Downhill skiing off the marked trails
- Horseback riding on designated routes between Nová Sedlica municipality and Medová baba, and between Nová Sedlica and Lipová
- Tent camping in Nová Sedlica and Ruské
- Paragliding and hang gliding at Malý Bukovec (Topoľa), and outside the park, from the air-strip adjacent to the astronomical observatory at Kolonica
- Astronomical tourism – stargazing – at the astronomical observatory

BOX 3 Agritourism example: Mini Zoo Juško (https://ajc.estranky.sk/clanky/o-nas/AJC.html)

In the town of Snina, Veterinarian Vladislav Juško loves animals, not surprising for a veterinarian. While he treats local dogs and cats, he also helps many other types of animals on a ranch-like property near the center of town. He has also created a refuge for injured animals, including a hefty bison that was injured by a car, several horses, goats, and sheep. The refuge serves as a mini zoo, rehabilitation, hippotherapy (use of horses for therapy) and education center, often visited by local children and adults, some of whom have special needs. He loves to see the children meet the animals and experience them. In addition, he has established a mini dairy where he produces tasty cow, goat and sheep cheeses. Juško also created a small guesthouse on the property and a traditional bakery. He has established what really amounts to a nature-based attraction and hopes to create even more educational and entrepreneurial ventures.

As he wrote in a recent email, Juško has been thinking about how to improve the economic situation in Snina and he feels that the local people need to come together and agree on solutions before they approach external sources for funding. He also emphasized that there should be closer links and cooperation with Poland. Juško is optimistic that improvements to the Porta Rusica Trail will significantly improve the tourism situation and connections with Poland.

FIGURE 5 Photos from the mini zoo and the farm, Snina

Source: © Scott Wayne

Precise data is unavailable, but according to Igor Kudzej, Director of the Astronomical Observatory, their status as a Dark Sky Park (one of 20 with that official designation) attracts a steady flow of visitors, particularly in the summer months. In 2018, they received 5,500 visitors and, he said, that with additional visitor infrastructure in place, they could accommodate even more.

Cultural and community tourism

Cultural tourism sites and activities comprise the most popular form of tourism worldwide and thus are important experiential assets for Snina District tourism. According to the UNWTO, cultural tourism is one of the largest and fastest-developing global tourism markets. Around 40% of international tourists undertake some form of cultural activities during their travel.[43] A report from the Organization for Economic Co-operation and Development (OECD) on *The Impact of Culture on Tourism* indicates that 50% of European tourism, and 50% of tourism from the United States to Canada, is culture-related.[44] The European Commission's *Eurobarometer* studies indicate that specific cultural tourism has grown in Europe in recent years, with the proportion of European tourists specifying culture or religion as their main visit motivation, growing from 6.8% in 2008 to 10% in 2014.[45] For Chinese, Japanese and Australian travelers, the percentages are even higher, at 80%, 67% and 64% respectively, according to data from Microsoft Expedia Media Solutions. The magnitude of this demand bodes well for cultural tourism in the PSK region and districts.

At the PSK level, there are over 4,059 registered cultural monuments, 3,500 of which are classified as national cultural monuments, 56 of which are in the Snina District.[46] These monuments include castles, chateaus, archaeological sites, military monuments, Jewish heritage cemeteries, 27 unique wooden churches, and four open-air folk museums. As emphasized in the PSK Regional Strategy, most of these are connected to the country's rich intangible cultural heritage.[47] Included are several other religious monuments and pilgrimage trails that reflect the deep religious legacies of the region. The pilgrimage trails—St. Mary, St. Jacob's Way and the Holy Father's Trail—connect across Europe with the Santiago de Compostela Trail and are strong draws. Although the trails do not cross the Snina District, they could be included within the PSK-wide itineraries, and, if packaged well, could persuade visitors to extend their stays in Snina and Poloniny.

Snina also has several cultural organizations dedicated to preserving local culture and customs, which would interest visitors. These include the Municipal Cultural and Educational Center in Snina Castle, the Andrea Smolák Gallery, the Vihorlat and Shinava folklore ensembles, and other smaller music and dance groups, including Roma groups. Ruthenian culture would also interest visitors. Several organizations, schools, museums, educational centers, leisure centers, theaters, and amateur folklore ensembles (Polina in Ulič, Beskydy in Stakčín, and Čemerica in Stakčín) are also offering activities.

Visitors would also be interested in the demonstrations of traditional crafts, such as weaving and pottery making, offered by the Fenix Poloniny Civic Association in Snina. Increased visitor interest and demand would also help local communities generate more income, as well as support the preservation of traditional crafts. As mentioned above, the participation of three artisans in the Snina private sector tourism session convened by the mayor on March 5, 2019, was a positive indicator: One made thatched roofs, a second made traditional furniture, and a third specialized in producing traditional musical instruments.

Marketing and Comparative Advantages

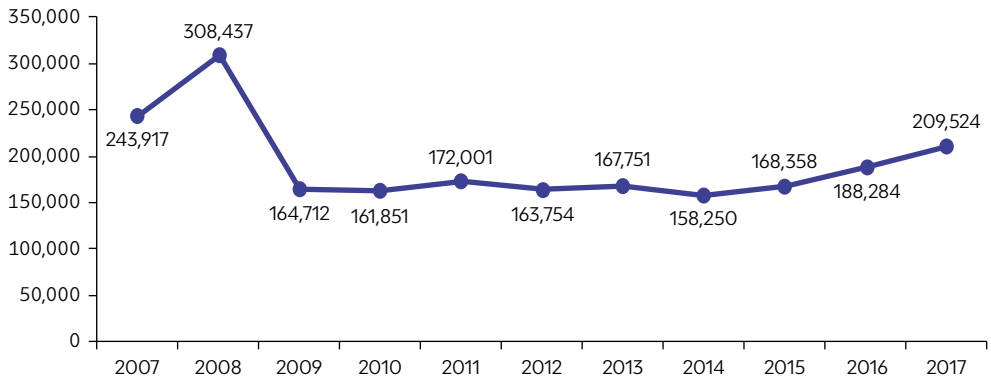
Existing demand in the region

The Slovak National Statistics Office collects data on: tourism (such as international tourist arrivals and tourism receipts), economic impact (through a national tourism satellite account)[48] , and accommodations (number of properties, rooms, beds and overnight stays by country

of nationality). Municipalities also collect local bed taxes from most accommodations within their jurisdictions, which provides some estimate of local tourism spending. As mentioned above, tourism to the Slovak Republic (SR), and domestic tourism within the SR, has been growing, with growth recorded for several districts in the PSK, although not in Snina or NPP. The Polish market, however, shows some potential for growth, particularly as the Porta Rusica Trail improves access between Poland and the Slovak Republic.

As the following chart (Figure 6) shows, Polish visitors to the SR numbered 308,437 in 2008, but that dropped by nearly half in 2014, and recovered somewhat to 209,524 by 2017. While the increase is a positive sign for a recovery in demand, it is still one third less than the 2008 high point. It is not within the scope of this report to examine the reasons for this drop, but the high point suggests a greater potential for Polish tourism to the Slovak Republic. With the number of visitors reaching 487,000 in Bieszczady National Park in Poland, a similar park in terms of biodiversity just across the border from Poloniny, the potential for increased visitors to Poloniny also seems likely, especially with the improved access that might occur as the Porta Rusica Trail improves.

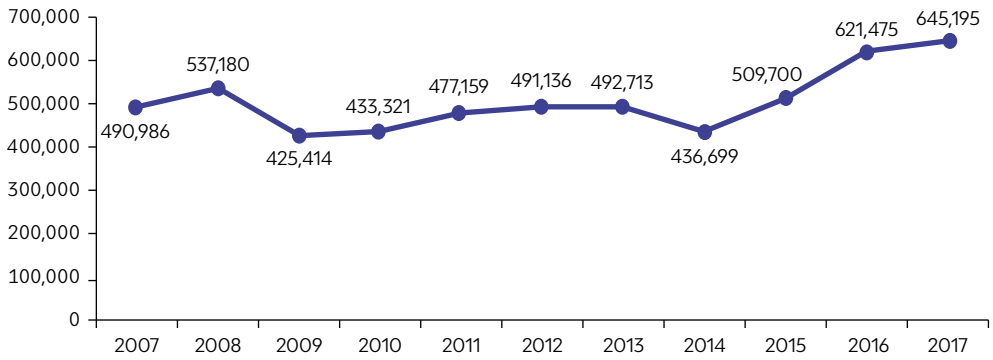
FIGURE 6 **Polish outbound visitors to the Slovak Republic (2007 – 2017)**



Source: UNWTO Data

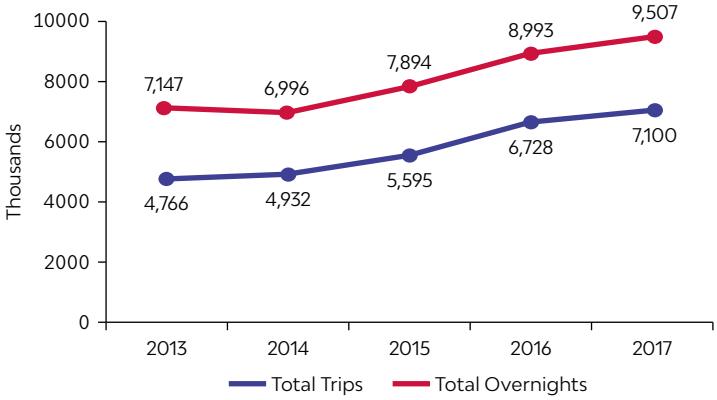
As the following chart (Figure 7) shows, Czech demand for travel to the Slovak Republic increased in 2008 and then dropped to its lowest point in a decade, but began increasing steadily from 2014 onward to a high of 645,195, a 32% increase. Whether that growth can be sustained is uncertain, but it does suggest that the Slovak Republic is increasingly appealing to the Czech market. Since it is the largest foreign market for the Snina District, albeit only 8% of total visitors, demand for the district and Poloniny hopefully will increase with improved infrastructure, product offers, and marketing.

FIGURE 7 **Czech Republic visitors outbound to the Slovak Republic (2007 – 2017)**



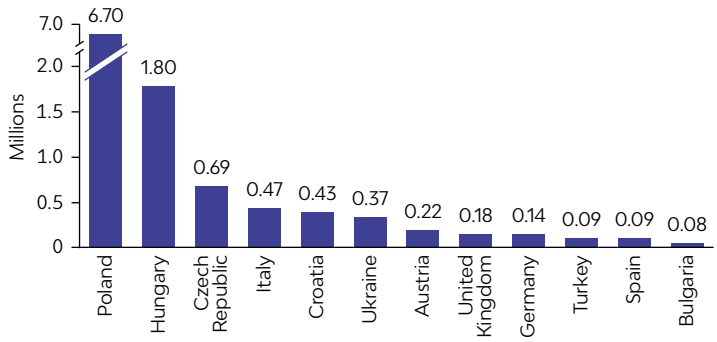
Source: UNWTO Data

FIGURE 8 **Domestic tourism in the Slovak Republic (2013 – 2017)**



Source: UNWTO Compendium of Tourism Statistics, 2018..

FIGURE 9 **Slovak travel outside the Slovak Republic**



The strongest existing, and perhaps greatest potential, demand for the Snina District and Poloniny Park is, as indicated above, the domestic market. Accommodations data for the Snina District indicated that 77% of visitors were Slovak citizens. Since 2013, as the below chart shows (Figure 8), domestic trips and overnight stays in the Slovak Republic have increased by 33% and nearly 50%, respectively, as of 2017. A total of 7.1 million trips by Slovaks is a substantial total from which to draw visitors to the region. Currently, however, as mentioned previously, Poloniny is capturing only between 5196 and 15,000 visitors, with the former representing overnight visitors, thus less than 1% of the domestic market.

For the Snina District and NPP, **the domestic market** is the most immediately accessible market. According to Ministry of Transport and Construction data, for longer-term domestic trips, 62% of people traveled for the purpose of recreation and leisure (62%), and for shorter-term domestic trips, 32% engaged in recreational activities and sports.[49]

A frequent complaint about **the domestic traveler** by industry stakeholders is that **the domestic traveler tends to spend less per day than foreign visitors**. According to Ministry of Transport data, the domestic visitor spends an average of €144 daily domestically. This is a reasonable level, but outside the country, Slovak travelers appear to be willing to spend more on travel. There, the daily spend averages about €387. In 2017, as Figure 9 shows, most Slovaks traveled to Poland, followed by travel to several other countries. Based on the available data, it is not possible to determine the reasons for, or the periods of, travel, although most tourism in Europe is concentrated in the summer months for coastal holidays. Extending their stays and increasing their spending in the Slovak Republic would require increased product development and marketing aimed at the domestic traveler.

Enabling the Business Climate: Policy, Governance, Strategy, Investment, and Planning

At the national level, the Slovak Republic ranked well in the World Bank's 2019 Doing Business Report – 42 out of 190 overall, higher than Italy (51) and Hungary (53). The country's strongest rankings were first for trading across borders, 9th in registering property and between 42 and 48 for getting electricity, getting credit, paying taxes, enforcing contracts and resolving insolvency – all important issues for growing the tourism industry.

The country's overall rank on the World Economic Forum's Global Competitiveness Index was 41 out of 140, and reasonably competitive on enabling environment – 55th on institutions, 11th on the quality of land administration, 33rd on infrastructure and 35th on Information Communication Technologies (ICT) adoption. On the WEF's 2017 Tourism Competitiveness Index, the Slovak Republic was similarly positioned fairly well, with an overall ranking of 59 out of 136, and business environment rankings that included first in construction permit costs, 17th in foreign direct investment rules, and 28th in the cost of starting a business.

From a private sector tourism investment perspective, the rankings bode well for investing in and operating tourism-related businesses in the Slovak Republic. Conditions do vary across the country, as numerous studies covering the PSK, Snina District and Poloniny Park demonstrate, where especially the latter two jurisdictions are behind the rest of the country. A mind-boggling assortment of strategies, plans and reports related to tourism development for the PSK and sub-jurisdictions can be taken as a positive sign that there is interest at all levels in analyzing and planning for tourism development. There are also numerous challenges in attempting to take actions based on this assortment of documentation, which are listed below in the next section.

This documentation includes:

- Study of the Sustainable development of Protected Areas in the NPP
- Strategy for the Development of Tourism Products for Astronomy
- Snina Tourism Development Strategy for Astronomy Products in the Polish Slovak Border Region December 2010
- Strategy for Destination Marketing of Tourism in the Prešov Self-Governing Region
- Regional Economic and Social Development Program of the Prešov Self-Governing Region 2014 – 2020
- Rural Development Program for the Prešov Self-Capitalize governing Region
- The Economic Development and Social Development Program of the Municipality of Ruský Potok for 2016 – 2025
- The 2017 – 2025 Economic and Social Development Program of the municipality of Ulič
- The 2017 – 2025 Agenda for the Economic Development and Social Development of the municipality of Nová Sedlica
- The Economic Development and Social Development Program of the City of Snina 2016 – 2022
- Action Plan for the Development of the Snina District 2019 – 2023
- A Community plan for the Municipality of Nová Sedlica 2011 – 2021
- The Runina Economic Development and Social Development Program for 2016-2025
- The Concept of Development of Tourism in the Upper Zemplin 2012 region
- Tourism Development Concept of Snina for the period 2012 – 2021
- The Integrated Territorial Development Strategy for the Country Action Group 2009 – 2015
- Tourism Action Plan for the Municipality of Zemplínske Hámre
- Strategy for the Sustainable Tourism Development of the Carpathians
- Poloniny National Park Management Plan for 2017 – 2026

In addition, the Tourism Support Act (2010), the Regional Destination Management Organization, and the representative local offices (reporting to the Regional DMO) in the PSK, can all be positive stimulants for tourism demand and enablers for tourism development, investment, and business.

The interest in tourism and leadership of the PSK Executive, the mayor of Snina, and the mayors of municipalities in Poloniny, along with energizing entrepreneurialism, can be the catalysts for building the necessary consensus for tourism development.

The Economic and Social Development Program of the Prešov Self-Governing Region

The Economic and Social Development Program of the Prešov Self-Governing Region for the Period 2014-2020 (ESDP) was launched in 2014 and drafted in accordance with goals and priorities of the National Strategy for Regional Development and the National Strategy for Sustainable Development. The aims of this program can move the PSK towards a more sustainable tourism sector:

1. Create job opportunities for unemployed young people, long-term unemployed and others, especially in rural areas
2. Quality improvement of rural living conditions
3. Promote measures supporting economic growth in industry, tourism, services, forestry and agriculture
4. Promote innovations
5. Develop culture and arts
6. Reduce pollution and energy consumption and increase waste recycling
7. Improve transport accessibility and connectivity[50]

Tourism was named as a priority area for development, along with the complementary areas of entrepreneurship and innovation, infrastructure, education, culture and creative industries, and environmental management services.

The program is extensive, ambitious, and, if fully funded and staffed, it could provide a strong foundation for sustainable tourism development in the PSK, the Snina District and Poloniny. The extent to which implementation of this program has happened was beyond the scope of this report to determine, but it is an important follow-up exercise for maximizing the effectiveness of the program, particularly in acting as the overall integrative strategic program for the many other strategies and plans listed above.

Strategies and planning for the Snina District

At the Snina District level, the *Action Plan for Development of the Snina District* (February 2019) and the *Development Concept for the Sustainable Protection and Economic Use of Snina's Natural and Cultural Values* (March 2018) are important guiding documents for sustainable development overall, and particularly tourism. Both documents provide extensive coverage of the sustainable and practical use of the district's natural and cultural heritage. As with the PSK level program described above, both documents lay out an extensive and ambitious potential foundation for sustainable development, which, if fully funded and staffed, could boost sustainable tourism in the Snina District and Poloniny. Again, the extent to which this has happened, at least with the March 2018 strategy, was beyond the scope of this report to determine. The Action Plan development was led by Mayor Daniela Galandová, who has a tourism background and envisions an optimistic future for tourism in the district and park.

As with the PSK Program, it was also beyond the scope of this report to determine the extent to which these strategies build on the PSK and national level strategies. Integration with these broader national and regional strategies could help maximize the use of financial and human resources. Identifying and acting on the synergies would boost implementation of these strategies, as well as the broader strategies described earlier.

Regulatory framework: Tourism Support Act of 2010

An unregulated or loosely organized tourism sector is unsustainable. The industry can easily become a victim of its own success, or worse, degrade a destination. To ensure that regulations are a win-win for stakeholders, and not self-defeating, an organizational structure is needed to facilitate and manage communication, and, ideally, achieve consensus on the development strategies and plans. Otherwise, either the regulatory framework is too loose, allowing unfettered development that devalues a destination, or excessive, deterring investment and development, thereby preventing the revenue generation needed to sustain the destination and its communities.

The Tourism Support Act 2010[51] (amended 2018) seems to offer a balanced approach to guiding destination management that has the potential to help strengthen tourism development throughout the country. The act regulates regional and sub-regional destination management systems, as well as their subsidiary entities, DMOs and Tourism Information Centers (TIC) in the Slovak Republic. The act stipulates that regional and municipal administrations have the following role and responsibilities in the development of tourism:

- Initiate the establishment of a regional organization, and sub-regional DMOs, including TICs, and participate in its co-financing.
- Cooperate with the regional and the sub-regional organizations in the creation of programs and plans for economic, social, and cultural development of the self-governing region, including tourism development, planning and monitoring the tourism.
- Create positive conditions for cooperating with businesses in the region
- Encourage more entrepreneurship in tourism.
- Cooperate with national authorities in implementing the state tourism policy.
- Support the development of cross-border, interregional and transnational cooperation in tourism.
- Motivate citizens to develop tourism, improve service quality and competitiveness.
- Cooperate with the government authorities of the Slovak Republic for a unified presentation of the country abroad.

[The act also stipulates that private sector entities and foundations can establish TICs. Details on the establishment of DMOs and TICs are described in Output 1.]

Destination Management Organizations (DMOs)

As mentioned above, organizational structures are needed to facilitate and manage communications, and ideally, achieve consensus on development strategies and plans. The DMO approach has proven globally to be an effective organization type to help maximize sustainability, inclusiveness, and economic benefits of tourism in destinations. Output 1 for the PSK Catching Up Regions Initiative describes in detail the DMO system. One of the main recommendations of Output 1 was to consolidate the 34 Tourism Information Centers and seven sub-regional DMOs into a single Regional DMO. Other main recommendations included:

1. Address intra-regional investment asymmetries.
2. Scale up connections between tourism products and destinations within the region.

3. Continue support for innovation, enhanced marketing, and a larger proportion of revenue-generating tourism services.

4. Adopt an evidenced-based approach to strategic planning by sector through systematic collection and use of data.

5. Draft a regional strategy for tourism development.

The following discussion briefly summarizes their role in tourism development and marketing.

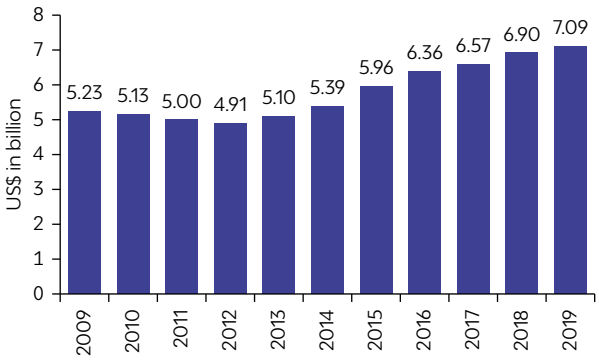
DMOs are regulated by the Tourism Support Act 2010, which provides a framework for the establishment, functions and membership of the 43 DMOs operating at the regional and sub-regional levels. Six operate as Regional DMOs (R-DMOS)- referred to as Krajské Organizácie Cestovného Ruchu (KOCR) and 37 act as sub-regional DMOs - Oblastné Organizácie Cestovného Ruchu (OOCR)[52]. According to the act, sub-regional DMOs are responsible for the development of strategic and conceptual documents, annual planning and projects for tourism development, and cooperation with municipal authorities and associated members. They are also responsible for initiating tourism product development, stimulating and supporting the sustainable development of social, cultural and sports life at regional and sub-regional level, and the protection of cultural heritage. Unlike the sub-regional DMOs, regional DMOs can market within the Slovak Republic and abroad. And while the statutes specifying the role of DMOs does not explicitly indicate a role in responding to funding calls and seeking investment, the law could be interpreted such that this role is possible.

One of the most important roles for a DMO, whether regional or sub-regional, is to bring stakeholders together to identify issues of common concern and agree on solutions. These solutions could be policy-related, public services, development zoning, local product offers, and coordination with local communities, as well as district and regional authorities.

Economic Impact

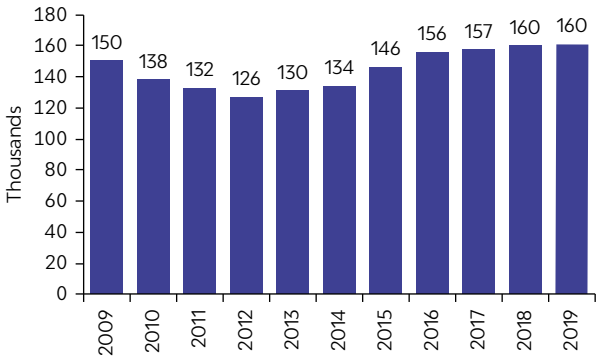
Tourism is an important sector for the economy of the Slovak Republic. In 2017, Slovak Republic ranked 43 out of 50 in international tourist arrivals, which totaled 7,6 million, an 8.5% increase over 2016.[53] According to the World Travel & Tourism Council (WTTC)[54], in 2017, tourism's direct contribution to the Slovak GDP was 2.6% (worth €2,2 billion), and combined with indirect impacts, tourism accounted for 6,57% of the national economy (see Figure 10). This substantial economic impact also generated tens of thousands of jobs throughout the economy where according to the UNWTO, in 2018, tourism alone generated 160,020 jobs in Slovakia (see Figure 11).

FIGURE 10 **Total contribution of tourism to the GDP in the Slovak Republic (US$ in billion)**



Source: WTTC Online Data Tool

FIGURE 11 **Total jobs generated by tourism in the SR**



Source: WTTC Online Data Tool

The PSK region, beyond the Snina District, has benefited from this growth. As Table 4 shows, the region has earned over € 86 million from domestic and foreign overnight stays.

TABLE 4 PSK accommodations performance 2017

Accommodation Receipts of Domestic visitors	€ 62,907,386	Average receipt per domestic visitor	€ 70.35
Accommodation Receipts of Foreign visitors	€ 23,344,474	Average receipt per foreign visitor	€ 84.38

Source: https://www.mindop.sk/ministerstvo-1/cestovny-ruch-7

The Snina District has not yet reaped sufficient benefits of this growth but given the continual development in other parts of the country, including in the rest of the PSK, the potential for growth exists.

Currently, the Snina District municipal government and local businesses generate revenue mostly from overnight stays. The former collects a bed tax, and the latter generates services revenue from room nights and/or food service. Local municipalities in the park also receive tax revenue from immovable properties, as well as revenue for renting space and managing communal waste.[55]

There are additional options for revenue such as tour guiding, crafts sales, bicycle rentals, park admissions fees, and so on, all of which could also generate additional tax revenues. However, all of these need to be further developed in the district and the park. The potential exists to increase the number of these, and other experiential offers, that could generate revenue, taxes, and employment.

Human Resources – Education and Training

The human resource situation in the Snina District and Poloniny is currently challenged by several factors, which are described below in the next section. With high unemployment and underemployment in the district, investment and entrepreneurialism are needed to stimulate growth and generate jobs.

Tourism offers entry level and inclusive opportunities for microenterprises and employment. Training and education are needed to prepare people to establish businesses and/or be employed by them. Some entrepreneurialism exists, as well as a few vocational level training programs.

- Local entrepreneurialism in tourism – In the district, veterinarian Vladislav Juško (see above Box 3) and Ladislav Jurpak, owner of the Vihorlat Resort, are two examples of local entrepreneurs who have launched successful ventures and always seem to be searching for additional sources of sales to continue growing their businesses. The secondary school in Snina offers training for blacksmith work, gastronomy (cook training, confectionery production), folk art, and leather production.[56] As the local tourism industry grows, staffing needs will also grow and will, ideally, stimulate and motivate more people to begin offering services and experiences.

- Opportunities –Generating opportunities and reducing unemployment, especially among the youth, are the main objectives of strategies and plans, such as the Action Plan for the Development of the Snina District (2019-2023). The plan aims to reduce the unemployment rate in the district by helping create 579 jobs by 2023.[57] It intends to accomplish this, in part, through tourism, particularly through training to preserve traditional craftsmanship, including the preservation and restoration of cultural monuments.[58]

As Figure 11 shows, 160,000 jobs were generated in the Slovak Republic by tourism, in 2018, a total that is forecast to increase by at least 1000 annually over the next decade. If some of the challenges described below are addressed, then a portion of these jobs will be generated in the Snina District, and tourism-related entrepreneurialism will be stimulated.

WEAKNESSES AND CHALLENGES: THE CASE AGAINST TOURISM DEVELOPMENT IN POLONINY

The Snina District and Poloniny Park are beset with weaknesses and challenges that have stalled development of the local economy. If local communities are resigned to accepting that the challenges are unsolvable; if they believe that further economic decline, the outflow of young people in particular, and the resulting depopulation, are inevitable; then the case against developing tourism in the district is easy to make. In considering the following challenges, it is also important to remember that most of these challenges will persist, regardless of the industry sectors that are pursued. The key question to ponder then is, whether tourism is the best solution for addressing these challenges, a question that will be taken up in Section 4.

The main challenges can be categorized as follows:

1. Infrastructure
    a. Visitor services: accommodations, restaurants, cafés and rest areas
    b. Transport access (road, rail and air)
    c. Waste management
    d. Water access
2. Level of product development and marketing
    a. Traditional crafts
3. Human resources and labor situation
4. Business climate constraints
    a. Investment climate.

INFRASTRUCTURE

The existing core and supporting infrastructure constrain development, in general, and especially tourism, in the Snina District and Poloniny. Four main types of infrastructure are the principal constraints, each of which is described below:

a. Visitor services: accommodations, restaurants, cafés and rest areas

b. Transport access (trails, road, rail and air)

c. Waste management

d. Water access.

However, as emphasized in the Output 1 Report on Tourism Information Centers and Destination Management Organizations, though infrastructure is certainly a constraint, linking thematic products with other sub-regions and destinations in the PSK could overcome the challenges and strengthen tourism in the district. With adequate infrastructure, there are enough destinations and attractions in the Eastern PSK to generate marketable packages.[59] The following sections describe these needs in more detail.

Visitor Services

In the Snina District, there are 23 accommodation facilities – hotels and pensions – with 1,602 beds. With annual average occupancy rates of 12% for the district and 7.1% for the park, there is tremendous underused capacity. As reported above, the summer months are busy, but the rest of the year the facilities are nearly empty. While international brands are not present in the Snina District, that is not a critical issue for the mostly domestic and adventure market segments that predominate and show the greatest current growth potential. The principal problem with accommodation is the seasonality issue. Bringing facilities on par with the level of quality offered by properties in the Tatra Mountain resorts, might help overcome the seasonality challenge, whereby most of the year the park is not visited. This can happen as the product offers and infrastructure improve, hospitality training opportunities are offered to Snina District residents (particularly young people), and more investment flows into the district. While attaining a Tatra resort level of service might not be realistic in the foreseeable future, it is a potential standard for aspiration.

Other visitor services, such as restaurants and cafés, bicycle rental, visitor rest areas, and public toilets are in short supply in the NPP communities. Properties such as the Hostinec Beskyd in Nová Sedlica, which accommodates nine guests, do offer a café area and bicycle rental, but more is needed. The low number of visitors has most likely discouraged private investment in additional services, as well as public investment in facilities. However, at the same time, the lack of services discourages visitors, business expansion and investment. A definite stereotypical case of "which comes first, the chicken or the egg?" To reduce the risk for private investors, public investment and/or incentives can be used as catalysts for changing the situation. Investing in, and/or offering incentives to invest in the recommendations contained in this report, would boost visitor services and attract more visitors and spending.

Transport – Road, Rail and Air Access

The Snina District and NPP have less transport infrastructure than other areas of the Slovak Republic and are the most remote areas from the major population centers (Prešov, Poprad, Bardejov). This is evident in terms of road, rail and air access, including border crossings.

Road access

While there are 193,218 kilometers of roads in the district, none are motorways or international roads. The Snina District has only one road border crossing—Ubľa-Malyj Bereznyj (with the Ukraine)—and two pedestrian crossings—Osadne-Balnica and Ruské sedlo-Ustrzyki Gorne (both with Poland). The latter is through the Porta Rusica Trail. Although road access is a constraint, the level of improvement needs to be planned and then managed carefully, so that the local carrying capacity, especially of the NPP, is not exceeded, and the natural and cultural heritage which attract visitors, is not degraded.

Rail access

In the Snina District, the national railway line extends as far as Stakčín, connecting to Bratislava via an axis line through Snina and Humenné. The latter operates at least 10 times daily but requires connections in Humenné and Prešov. A narrow-gauge railroad was established in the late 19th century to serve Ulič Valley and other communities in the area, but that is no longer operational; its history is unknown at this point. More direct rail access to Snina and Stakčín, as well as restoring the line into the park area, would boost tourism development in the district and NPP.

Air access

No commercial airports exist in the Snina District. The closest major airport is Košice International Airport, a distance of 108 kilometers and nearly a two-hour drive. This airport offers limited international flights. A smaller regional airport is located at Kamenice nad Cirochou, in the Humenné District, which can serve unscheduled civil aviation with small aircraft and helicopters. Adjacent to the astronomical observatory, near the village of Ladomírov, is the Kolonica airport, which serves unscheduled light sports aircraft and ultra-lights. The lack of an airport in the Snina District with scheduled flights is a disadvantage in terms of access, compared with other destinations in the Slovak Republic and the region. Poprad airport, for example, carried 88,367 passengers in 2018, a 10% increase over 2017, and offers direct flights (depending on the season) to London, Tel Aviv, Bulgaria, Riga, Kiev, Montenegro and Antalya, Turkey.

Waste Management and Water Issues

Waste management is a challenge for the Snina District. According to the Action Plan for the Development of Snina District (2019-2023), only six out of 34 municipalities in the Snina district (Belá nad Cirochou, Dlhé nad Cirochou, Snina, Stakčín, Ulič, and Zemplínske Hámre) are connected to the public sewage system. In addition, solid waste collection and disposal is also a challenge, with only a third of waste (totaling 18,619 tons reported in 2017) being sent to landfills and, at least some of the rest, is going into illegal landfills that threaten the local environment. While some communal recycling efforts are underway in municipalities, these are insufficient according to the European Commission Waste Framework Directive, which determined that only 23% of solid waste was being recycled; the EU standard is 50%.[60] Access to potable water is also an issue, despite the establishment in 1987 of the Starina water reservoir in the NPP. The reservoir covers 250 hectares and holds 800 thousand cubic meters of water, which supplies most of the cities and towns to the west. Of the 34 municipalities in the district, however, only 10 are connected to the public water main (Belá nad Cirochou, Dlhé nad Cirochou, Pichné, Snina, Stakčín, Roztoka, Strihovce, Ubľa, Ulič and Zemplínske Hámre). The rest of the local population is supplied from their own wells, which is due to the inadequate connection of local municipalities to the public water supply system.[61]

The water issue is also critical for the establishment of food and beverage-related businesses. Well water is insufficient, and the limited treatment of water for these businesses, prevents them from receiving the necessary permits to start and maintain their operations. The European Commission's Drinking Water Directive provides detailed parameters for the quality of water intended for human consumption, and also specifies the requirements for tourism-related offers and operators.[62]

LEVEL OF PRODUCT DEVELOPMENT AND MARKETING

As emphasized above, the Snina District and NPP offer nature-based and cultural experiences and attractions that, given international demand trends, could be competitive offers if further developed. The insufficient infrastructure could, for now, be turned into a product and marketing advantage that leverages the wild nature, underdeveloped and undeveloped state of the park. This proposition could be strengthened, though, if the following challenges are addressed:

1. While the walking, horseback riding, hiking and cycling trail network is fairly extensive, crossing much of the park, trails in the areas of level 3 and higher protection, require improved signage and demarcation.[63]

2. Improved demarcation of natural and cultural heritage sites along the trails is needed. The district and Poloniny have many historic sites and memorials that would benefit from improved explanation and information panels.

3. Regular trail maintenance is needed.

4. Topographical trail maps are needed indicating appropriate trail uses.

5. The Snina District and NPP offer authentic, cultural and wild nature experiences that are not well known to experiential travelers. Targeted social media marketing is needed.

6. International travel media and adventure travel operators are generally unaware of the Snina District and the NPP.

7. The "Dark Sky Park" and observatory are hidden gems that deserve more marketing and promotion attention, particularly among the hundreds of thousands of amateur astronomers around the world.

8. As home to 211 species of birds, NPP could be a prominent birding destination, but it seems to be barely known in the birding world.

9. Marketing seems minimal as well for other experiential, nature and cultural tourism activities, such as cross-country skiing, horseback riding, paragliding and hang gliding.

10. With 56 cultural monuments, several of historic, archaeological and/or religious importance, along with the rich intangible cultural heritage, there are numerous untapped opportunities for attracting visitors to the region.

Handicrafts

Nearly every document consulted for this report mentioned depopulation and the outflow of young people due to a lack of work opportunities. Population data confirms this fact, showing a steady depopulation of the region. Preserving and maintaining the area's rich cultural heritage and traditions, such as handicrafts, is steadily becoming more challenging. As the Snina Action Plan (2019-2023) emphasizes, one of the results is that many traditional handicrafts that were being produced in the district are disappearing. However, according to the Snina Action Plan, the following handicrafts remain, and would be of interest to the visitors whose spending would help preserve these crafts: traditional whistles (Kolonica), horseshoes (Snina), carpets (Ruský Potok, Stakčín, Zemplínske Hámre), embroidery (Uličské Krivé), sculpture (Kolonica) and candlesticks (Stakčín, Belá nad Cirochou).[64] Producing quality crafts of these types and others, particularly those that offer pathways of creativity, could also incentivize increased numbers of youth to stay.

THE HUMAN RESOURCES AND LABOR SITUATION

As mentioned above, the human resource situation in the Snina District and the NPP is currently challenged by several factors. These include:

- Lack of employment opportunities in the Snina District and NPP communities has led to a brain drain—an exodus of working age people, especially younger people, with many of the latter seeking employment outside the Slovak Republic.

- The lack of opportunities has also led to unemployment that is higher than the rest of the country.

- The depopulation is also leading to an aging and less productive local population.

- The local education system is not cultivating much entrepreneurialism and innovation.

- Experiential travel, especially adventure and cultural tourism, is often generated by individuals with an idea, however small: such as producing fruit syrups (MMMm syrups in Uličí), creating a mini urban farm, selling cheese produced by the sheep and goats (Mini Zoo Juško, Snina), or focusing on school trips to fill hotel rooms (Vihorlat Resort, Snina). Multiple projects have been proposed, but not all have yet reached the implementation or action stage.

Ominously, without substantial positive socio-economic changes, some municipalities, especially those that have fewer than 99 inhabitants, will disappear.[65]

BUSINESS CLIMATE CONSTRAINTS: POLICY, REGULATORY ENVIRONMENT, STRATEGY, INVESTMENT AND PLANNING

A country's business climate affects competitiveness in generating tourism demand, and therefore, its attractiveness as a destination for investing and doing business. While the World Bank's *Doing Business Report 2018,* the World Economic Forum's *Global Competitiveness 2018* and *Travel and Tourism Competitiveness 2017* Reports, ranked the Slovak Republic fairly well on most indicators, the positive indicators have not yet stimulated much of a positive business climate for the Snina District and NPP. Combined with the negative rankings for the SR in these reports, there are several other challenges to overcome for doing business, in general, and for tourism-related businesses.

For the most part, the SR ranked well in the World Bank's *Doing Business Report 2018*. Multiple reforms had been implemented as of 2017, which strengthened the country's ranking as a place to invest and do business. They reported only three negative changes, none of which would seem to be a major deterrent for tourism businesses:

1. A new procedure has been added for establishing a limited liability company

2. The corporate income tax rate has increased

3. Land appraisal values have been adjusted.[66]

Compared with the World Economic Forum's rankings below, however, they are far more positive, which raises questions about both sets of rankings.

In both the World Economic Forum's *Global Competitiveness Report* and the *Travel and Tourism Competitiveness Report*, the Slovak Republic ranked poorly (among the bottom 50%) on a number of indicators.

These rankings are a cause for concern regarding the overall business climate for tourism, and particularly on the following critical indicators for tourism investment and business in which 136 is the lowest ranking:

- Efficiency of legal framework in settling disputes: 135 out of 136

- Efficiency of legal framework in challenging regulations: 131

- Effect of taxation on incentives to work: 134

- Government prioritization of travel and tourism industry: 118
- Travel and Tourism government expenditure: 98
- Effectiveness of marketing and branding to attract tourists: 116[67]

On the positive side, as mentioned above, there is a mind-boggling assortment of strategies, plans and reports, at all levels, in an attempt to create a more positive tourism development situation. Despite the low WEF ranking on the prioritization of tourism, the government does seem to recognize that tourism can be an important economic development strategy. However, at the same time, the stage is set, like a theatre with multiple productions happening simultaneously, with no single production, strategy, or plan able to marshal the necessary human and financial resources for a clear and coordinated implementation.

One of the causes, according to the Action Plan for Snina, is the lack of cohesion, the lack of a "single development concept in the territory...[and] a number of legal regulations affecting the District are not in harmony with each other." The Action Plan cites: "Act No. 543/2012 Z. z. o.: On Nature and Landscape Protection" and "Act No. 326/2015 Z. z. o on Forests," as examples.[68] According to the Action Plan, this is also apparent in the fact that protected areas (including the UNESCO Carpathian Beech Forest) are not managed by cross-departmental departments, but independently by individual government ministries. For example, the Ministry of Agriculture manages forestry and agriculture, the Ministry of Environment manages nature and landscape protection, and the Ministry of Transport manages accessibility, cycling, and tourism interests. The leadership of the PSK Executive, the mayor of Snina, and the mayors of the municipalities in Poloniny, can be the catalyst needed to create a consensus and a coordinated approach for tourism development.[69]

It will also help to have a single simple tourism development concept which can bring public and private sector stakeholders in tourism and related sectors together toward a more coherent business enabling environment for tourism. The next sections will recommend such a concept.

DISCUSSION OF STRENGTHS VERSUS WEAKNESSES

CONNECTING COMMUNITIES, PRODUCTS AND SUPPLIERS TO LEVERAGE STRENGTHS AND OVERCOME CONSTRAINTS

Creating a quality sustainable tourism destination can be likened to the process of creating a sculpture, similar to the following series of images. The process starts with the raw materials – the lump of clay. It is then shaped into something that begins to attract interest, some parts added, some taken away, until a final work of art emerges.

FIGURE 12 **Sculpting process**

Source: YouTube video: https://youtu.be/2saW2Bq0OKg

Not every destination becomes a 'work of art', of course, but destinations are created in somewhat of a comparable process. Like a sculpture, destinations offer an experience, or set of experiences, that are created, based on the ingredients of the destination. Even destinations that are wild and untouched nature, such as parts of National Poloniny Park, can be the basis for the creation of these experiences. The natural and cultural heritage of the Snina District and NPP – and demand for the experiences that can be offered—provide sufficient ingredients for the development of a local tourism economy and sustainable tourism destination.

On the positive side, there are some promising tourism-related ingredients regarding infrastructure, product offers, existing demand for these products, the business climate, economic impact, and the human resource situation.

All of these positive ingredients are countered by weaknesses and challenges, which add up to a daunting set of constraints and obstacles to tourism investment and development in the Snina District and NPP.

Nearly every document consulted for this report cited infrastructure in its various forms as one of the main constraints in maximizing the benefits of the existing and potential positive elements of tourism in the district and park. The Porta Rusica Project, described above, is a step in the right direction to address this constraint. It is expected to stimulate more visitor demand and, with this

demand, as destinations around the globe demonstrate, investor interest and entrepreneurialism follow. However, to make the most of this interest and increase the triple bottom line benefits of tourism, the business climate constraints discussed above need to be addressed. If addressed, then the full force of tourism as an engine of economic growth and a critical means to improve livelihoods, and preserve cultural and natural heritage, can be realized for the district and park. Among the multiple challenges cited above, one especially stands out as a priority—the achievement of consensus and cooperation for sustainable tourism among local stakeholders.

The report, *Development Concept for the Sustainable Protection and Economic Use of Snina's Cultural and Natural Values*, reiterated the need for consensus and cooperation, especially for improving the business climate. The report emphasized that while national level action is important to achieve the legislative and regulatory changes needed for sustainable tourism, it is also important to create a bottom-up pressure, which means communicating the needs of the local communities in a coordinated and cohesive way.[70] And that also means achieving local consensus on tourism infrastructure, product, labor, and educational priorities. Having this consensus can also help to stimulate entrepreneurship and create additional tourism service providers – everything from bike rentals, beekeeping visits and product sales, tour guides, drivers of tourist vehicles, café operators, and so on.

The DMOs and Tourism Information Centers that have been analyzed in Output 1 might serve as the local institutional management structure to help bring people together. In NPP, people can be drawn together through rallying around a thematic trail similar to the Lebanon Mountain Trail (which is described below); and among the communities, aspiring to create an Albergo Diffuso type system (which is also described below) can provide a common community purpose and boost local economies.

Can the local cooperation and bottom-up pressure succeed? Given the growing overall tourism demand in other parts of the PSK and the Slovak Republic as a whole, as well as the increasing demand for the type of experiential travel (adventure and cultural tourism) that the region can provide, the potential for further growth seems less daunting and more optimistic.

INTERNATIONAL BEST PRACTICE PRODUCT EXAMPLES

THE ALBERGO DIFFUSO MODEL

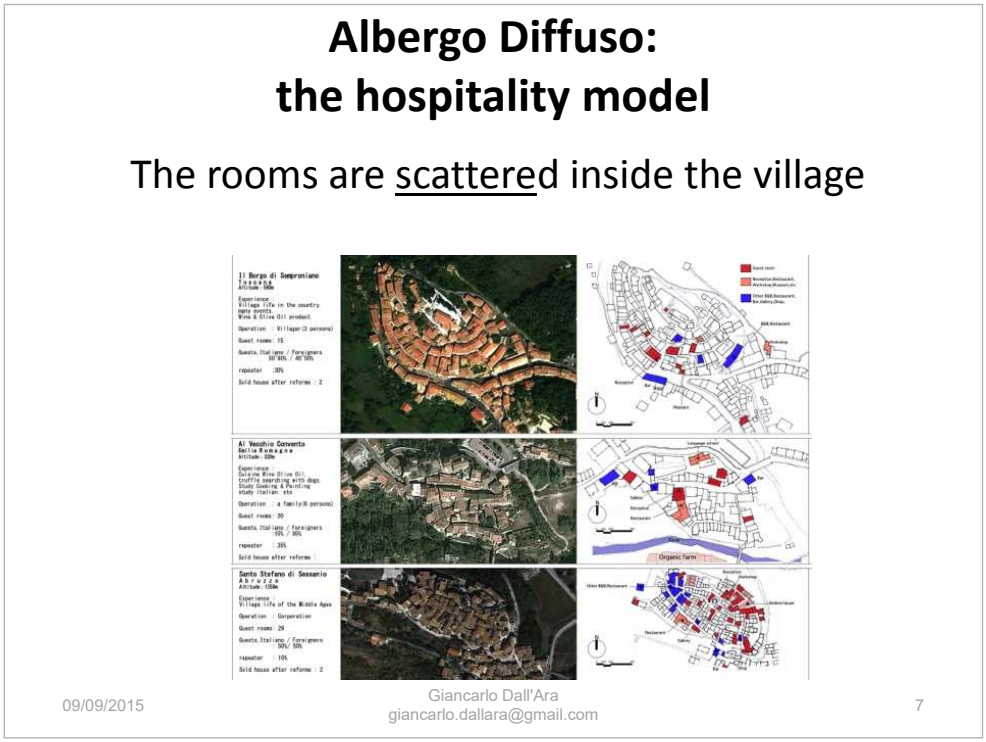
According to the Italy-based, Associazione Nazionale Alberghi Diffusi, the Albergo Diffuso (AD) is a relatively recent concept in Italy and Europe, that can be traced back to the idea of using restored houses for tourism with the funds allotted after the earthquake in the Friuli region (1976). Developed by tourism marketing professor Giancarlo Dall'Ara, his original idea was to bring local villages in Friuli, the north east corner of Italy, back to life through tourism. The villages had been devastated by the 1976 earthquake. The idea was to offer guests an authentic cultural experience of staying in the historic center of a village, town or city, with high quality hotel and catering services that are "diffused" throughout the community. At the same time, the concept offered a way for these communities to restore and maintain traditional houses, and stem depopulation, especially of villages. The approach also encouraged hotel managers and local owners to become storytellers for guests and recount their family histories, which makes guests' stays more personal and special.[71]

The conditions for establishing an AD were succinctly described in a short publication, *Albergo Diffuso Developing Tourism through Innovation and Tradition*:

- The idea has been launched within the local community and the residents have learned the advantages that can come from the innovation.
- Local actors are interested in working together.
- A unique management unit can be created and is willing to take most of the entrepreneurial risk. The unit can be either a single entrepreneur, a cooperative, or any other most suitable form of productive association.
- There exists a reasonable number of rooms (minimum seven) located at a reasonable distance from each other (not more than 200 meters), that can be available for the Albergo Diffuso for at least nine years.
- The town or village can provide minimum services to the guests (a pharmacy, a food store, coffee shop, and so on).
- The surroundings of the area should have some appeal (countryside, sea, mountains, archaeological sites, and so on).
- The town or village is inhabited by a lively and welcoming community ready to share experiences with newcomers, and to spend quality time with the tourists.[72]

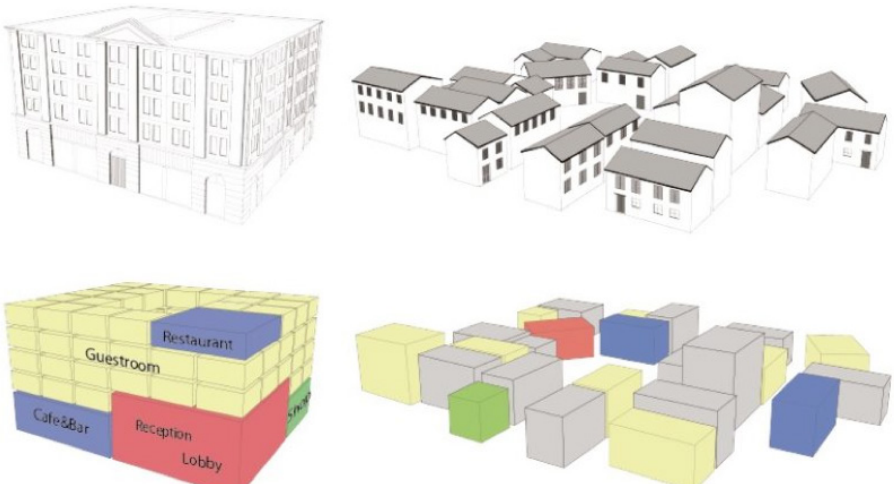
The International School Specializing in the Albergo Diffuso (S.I.S.A.D.) based in Forgaria nel Friuli, Italy (the town of origin of ADs) offers training courses, such as, an *Intensive Course to Create Albergo Diffuso Enterprises* and a *Workshop about Awareness, Feasibility and Planning of an Albergo Diffuso* to help prospective AD host communities launch and maintain an AD. The former costs only € 150, and the latter workshop is free of charge.

FIGURE 13 The Albergo Diffuso model



Source: Source: Slideshare Presentation on LinkedIn: https://www.slideshare.net/dallara/what-is-an-albergo-diffuso/7 from Dr. Giancarlo Dall'Ara, 2015.

FIGURE 14 Traditional hotel vs Albergo Diffuso model



Source: Associazione Alberghi Diffusi

Potential lessons for Snina District and Poloniny

An AD network might be appropriate for the villages in Poloniny, since some of the conditions that led Dall'Ara to pioneer the AD concept are relevant for these villages: depopulation, insufficient resources to maintain properties, lack of local economic opportunities, and vestiges of cultural heritage. The AD system offers some of the following potential lessons learned for successful ADs:

1. Local administration is willing to incubate the AD initiative.

2. Vacant houses are available in the village that could be of visitor interest and are in good or restorable condition.

3. Local community residents agree that they want to create an AD and cooperate in maintaining it.

4. Local residents are open to welcoming visitors.

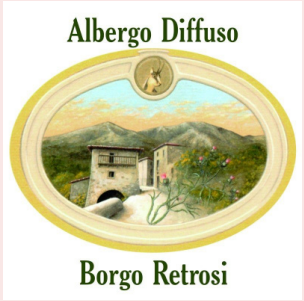
5. There exist municipal and/or regional legislation, policies, and strategies to ensure hospitality standards.

6. A local management unit, perhaps a DMO-type structure, leads the endeavor, including the development of a business plan.

BOX 4 Villa Retrosi: An Albergo Diffuso Example in Italy

Established in 2001, the Cooperative La Conca Amatriciana supports the revitalization of Retrosi, a small part of the municipality of Amatrice in the Province of Rieti. Through supporting entrepreneurial activities, the Cooperative wanted to stem depopulation of the village. Establishing the Albergo Diffuso Villa Retrosi has stimulated tourism-related entrepreneurship. Some key figures:

- The number of Cooperative members has grown up to 37.
- The Cooperative's capital now totals € 500,000.
- The Albergo Diffuso started in 2002 with only three apartments and now includes 15.
- Real estate values of the apartments have doubled thanks to the AD and Cooperative activities.
- The Cooperative accessed € 730,000 in European Union funds, which were used to restore apartments and improve public spaces.
- As of 2007, the apartments were occupied for an average of 80 days each, providing an average yearly turnover of € 4,000 each.
- The break-even point was reached in 2008 with 14 apartments.
- A club house and recreational center with sporting facilities and swimming pool have been added.
- Depopulation of the village has been reversed.
- New small businesses have been established such as a fruit and vegetable vendor, a firewood vendor and a new camping site.



THE LEBANON MOUNTAIN TRAIL (LMT)

The LMT began as a USAID-sponsored €2,97 million project in Lebanon to focus on rural tourism development in 2005. As the trail grew, it connected multiple communities and sites along what eventually became a north-south network of 470 kilometers of marked hiking trails. The non-profit membership-based LMT Association was formed in 2007 to help develop, conserve and maintain the LMT, provide guidelines for protecting natural and cultural heritage, and offer training for generating economic opportunities.

The LMT now crosses one World Heritage Site, two Biosphere Reserves, four Nature Reserves, five Protected Areas, six "Important Bird Areas" in 27 sections of trail of varying levels of difficulty, with each trail section connecting one community to another, for a total of 76 villages and towns.

Training sessions are provided in communities for responsible tourism, guiding, establishing, and operating guesthouses, and communications. Since 2007, 60 accommodations owners and 50 guides have benefited from the training.

The LMT Association has become the main vehicle for developing and delivering community development and trail development/conservation services:

- Assistance to local communities with identifying income generating activities
- Guesthouse development and training
- Guide training
- Mapping of cultural and natural sites along the LMT
- Trail demarcation, signage, and maintenance
- Marketing to generate revenue for conservation
- Promotion of local guides and tour operators that offer partial or full LMT trail hikes

FIGURE 15 The Lebanon Mountain Trail

The Association sustains its activities through a budget, which in 2017 totaled €559, 150 generated from sales (of maps, LMT branded clothing, equipment, tours, and publications, and so on), memberships, donations, events, and investment revenue.

Lessons learned for the Snina District and Poloniny Park

The LMT crosses a country that has experienced a long history of international, national and inter-community conflicts and challenges. Yet, despite its political challenges, the country's GDP has continually grown. And, although it has not been the easiest destination in which to use tourism as an economic development strategy, by 2017 international tourism receipts had grown by 38% to € 6,8 billion, and international tourist arrivals had grown by 63% to 1,85 million since 2005.[73] The LMT has transcended cultural and political differences and created a common experiential brand, which has provided common purpose for the many communities along the LMT. Some lessons learned, which could be applicable for Snina and Poloniny, include:

1. Initial donor (USAID) funding launched the project and the association, including demarcation of the trail, stakeholder training, and community awareness.
2. The common LMT brand enabled stakeholders, especially local communities, to rally around a united purpose.
3. The association served a role similar to a regional DMO, through which communities could receive training to make the most of the opportunities that the trail offers.
4. The association has diversified revenue sources to sustain itself and help maintain the trail.
5. Local tour operators include LMT itineraries in their offers.

THE VIA DINARICA TRAILS

The nearly 2000 kilometer Via Dinarica Trails began as a project in 2010 with a pilot portion of the trail connecting Sutjeska National Park in Bosnia and Herzegovina and Durmitor National Park in Montenegro. In 2013, it was extended from Slovenia to the border of Kosovo, Albania, and Montenegro, and then subsequently was extended again to the Sharr Mountains of Kosovo, Macedonia, and Albania. Three main trails from north to south – the Green Trail along the coast, the White Trail through the Dinaric Alps and the Sharr mountains, and the Blue Trail in parallel, farther to the east. The trails are divided into 112 sections, each requiring about 2-7 hours to walk, crossing 200 mountains, 20 national parks, and 19 World Heritage sites.

FIGURE 16 The Via Dinarica Green Trail

The trails are still under development, with some parts receiving donor support, such as in Bosnia-Herzegovina with support from USAID (€879,246) and the United Nations Development Programme (UDNP) (€449,109).

As with the Lebanon Mountain Trail, the project is intended to have a significant, positive impact on poor communities in the countries along the trail, by giving local people, especially young people, an opportunity to stay and make a living. The project in Bosnia is designed as "a platform that serves to develop local communities and small businesses in the field of hospitality, service and tourism active on a local, national, and international level, as well as promote agriculture and cultural heritage."[74]

Four adventure travel companies—Black Mountain of Montenegro, Green Visions of Bosnia-Herzegovina, Outdoor Albania and VMD Adventure Travel—formed an alliance to jointly market tours on parts of the trail. They help travelers access activities along the trails, such as, caving, rafting, kayaking, hiking, mountain biking, skiing, and rock climbing. However, unlike the LMT, the alliance is not tasked with maintaining the trail or directly assisting communities.

The donor-supported Bosnia portions of the trails provide some assistance to local communities and encourage households to become more involved in tourism, especially by offering home-stays, locally made food products, and handicrafts.

Lessons learned

The Via Dinarica is an ambitious and impressive endeavor connecting communities in eight countries through three sets of trails. In the 1990s, these countries were at war, or in varying degrees of conflict, that shattered most of their economies. As with the LMT, tourism is proving to be a strategic tool for economic development and increased peace between the communities and countries. As a multi-country project, this is certainly more complex than the LMT, but it does offer some lessons learned:

1. As a multi-country set of trails, the Via Dinarica is more challenging to brand as a single product offer. It is still a work-in-progress, so more time is needed for the offers to appear as a single cross border Via Dinarica entity, rather than single country possibilities.

2. The formation of an alliance of tour operators is helpful for joint marketing.

3. The lack of a single entity, such as the LMT Association, reduces the possibility of joint branding and the sense of unity among the Via Dinarica communities along the trails.

THE WILD NATURE MODEL

The Wild Nature model is an approach whereby wilderness areas are either purposely restored, rewilded and/or left as untouched and undeveloped; that is, as wild as possible. In 2013, the European Commission published a technical report titled *Guidelines on Wilderness in Natura 2000* that provided guidelines for the management of protected areas. The report also provided a guiding definition of wilderness, that applies in part to NPP:

> A wilderness is an area governed by natural processes. It is composed of native habitats and species, and large enough for the effective ecological functioning of natural processes. It is unmodified or only slightly modified and without intrusive or extractive human activity, settlements, infrastructure or visual disturbance.[75]

Source: © Scott Wayne

The report further explains that this definition includes four qualities of wilderness: a) naturalness, b) undisturbedness, c) undeveloped and d) scale. The report also recognizes that in Europe, most of the wild areas that fit this definition are scattered or fragmented, so the term tends to be relative and adaptable to local circumstances.[76]

While it is not within the scope of this report to delve into the several years of research and documentation supporting the wilderness or wild nature approach, it can be emphasized that the approach helps preserve what is an increasingly difficult-to-replace natural heritage. The health of biodiversity and ecosystems are negatively affected when wilderness vanishes, which also negatively affects human health.

Pursuing a wild nature or wilderness approach without local community support and buy-in, however, is destined to fail. Examples abound around the world, especially in impoverished communities such as those in and around the national parks of Kenya and Tanzania. If those local communities did not benefit economically from the protection of these parks, then all of the animals were poached, and the parks were completely deforested, until they ceased to exist. Nature-based tourism, often known as ecotourism, has been a principal approach for ensuring local benefits.

A report from the United Kingdom-based David Sheldrick Wildlife Trust, *Dead or Alive? Valuing an Elephant*, reaffirms the value of an ecotourism and wilderness protection approach in the context of protecting elephant populations from poaching. The report estimated that a single dead elephant's tusks have a value of €18,900, whereas the estimated tourism value of a living elephant over its lifetime is €1,44 million. By their estimate, the elephant is 76 times more valuable alive than dead.[77]

While not directly comparable in scope, the African elephant example does point to the need for communicating to the local community the value of protecting the natural heritage around them. Ecotourism can be an optimal means of ensuring that the wilderness remains protected and preserved. The Slovak Government recognizes and emphasizes the importance of this fact for the Snina District in their report, Development Concept for the Sustainable Protection and Economic

Use of Snina's Cultural and Natural Values, where they stated that "in order to be capable of being protected on a sustainable basis, it should also be economically viable, particularly if it is to compete with other exploitation and development forms.[78]

Lessons learned

In destinations, such as the national parks of East Africa, where the wilderness model has been mostly successful, the lessons learned can be applied to the Snina District and NPP.

1. Local community buy-in is necessary, ideally via a participatory process involving stakeholders in decision making and generating new ideas, particularly for ecotourism experiences and services.

2. The process should be in coordination with local, regional and national legislation, policy, planning, development and marketing. Multiple examples exist for possible legislation, including from the Lombardy Region.

3. Training for local communities, especially for youth, is essential in order to actualize existing and potential ecotourism opportunities.

4. Basic visitor infrastructure, including technology for monitoring park entries, helps generate revenue.

ADVENTURE CENTER: NATIONAL OUTDOOR LEADERSHIP SCHOOL

While the lack of infrastructure in the Snina District and NPP have deterred higher numbers of visitors, this weakness could also be an advantage that positions NPP as an adventure destination and leads to the establishment of a Poloniny Adventure Center in the park, or in one of the municipalities of the park. Such a center could be based on the international programs of the US-based National Outdoors Leadership School (www.nols.edu) that is a long-established outdoor skills program for leadership, team work, environmental education, and the learning of survival skills in wild nature.

Testimonial from a NOLS Participant, Alissa Dahnert

Alissa is a Millennial age student who participated in a NOLS program in 2018. In many ways, she is the present and the future of the experiential and especially the adventure travel market in the USA and beyond. Here is what she had to say about her NOLS experience:

> *I partidpated in a semester-long NOLS program and found it to be a humbling yet entirely gratifying personal experience. In addition to gaining crucial outdoor survival skills and learning to navigate the intricacies of effective interpersonal cooperation, I was able to experience parts of the world that I would not have been exposed to otherwise. NOLS gave me a newfound appreciation tor the natural world as well as increased confidence in my own propensity to serve as a leader.*

The wilderness setting is an important dimension of the NOLS experience, since the organization's mission and core values are based on a 'leave-no-trace' approach, whereby participants leave the wilderness without any trace of having been there.

NOLS participants have included secondary and university age students, government agencies, including NASA, military and firefighters. They have also become a course elective in several prominent MBA programs, such as the Columbia Business School, Haas School of Business, Wharton, and Yale School of Management. Participation centers around an educational adventure in the wilderness that can be anywhere from one week to several months. The adventure is led by expert instructors, who teach the participants outdoor skills such as backpacking, rock climbing, kayaking, and wilderness survival. The expeditions are conducted from 16 centers around the world, including East Africa, India, Mexico, New Zealand, Patagonia, and Scandinavia. Aside from the center in northern Sweden, 140 miles above the Arctic Circle, no other NOLS centers exist in Europe. The shorter expeditions, such as the 14-day sailing program in New Zealand, or the 14-day Tanzania wilderness experience, also serve as educational tourism offers ("Edu-tourism").

Potential lessons for the Snina District and Poloniny

While the NOLS programs are designed especially with U.S. students in mind, and thus offer academic credit for certain programs, their approach is globally important and relevant. Their leave-no-trace philosophy of respecting wild nature and teaching life skills, such as leadership and team work, through adventure, can be applied to the Snina District and Poloniny Park. Potential lessons include:

1. The core expedition-type offer is low-impact ecotourism.

2. The offers are delivered as courses led by expert instructors, as part of a carefully structured curriculum.

3. Some of the programs, especially the ones overseas, include strong cultural heritage elements.

4. Tuition is charged for the programs.

5. Customized programs have been designed to meet the needs of corporate and government participants.

6. The NOLS Wilderness Medicine course is well respected internationally.

7. A physical or permanent center is not a prerequisite for a NOLS program, since many of the activities occur in wilderness.

8. The NOLS concept could effectively build on and expand the past popular practice of Nature Schools—*Školy Prírody*—in the Slovak Republic.

RECOMMENDATIONS AND NEXT STEPS

The Snina District and NPP are faced with a daunting set of challenges, but these are not insurmountable. Local leadership could inspire local stakeholders to embrace tourism as a priority means to improve their livelihoods and preserve their cultural and natural heritage. Below are three main sets of recommendations and next steps. The first set relates to "Policy and Actions for Country Financing." The second set relates to "Investment Opportunities under the European Structural and Investment Funds. And the third set is investment opportunities under the programing period (2021 – 2027).

Among the following recommendations, a funding call for beginning the designation and creation of the Poloniny Park Trail could provide a base on which to stimulate further tourism development and investment activities, especially along multiple links of the abovementioned tourism value chain (see Figure 16).

POLICY AND ACTIONS FOR COUNTRY FINANCING

The following five recommendations are all immediately actionable with the possibility of quick wins and benefits that will, in turn, stimulate deeper actions that strengthen tourism development in the region. These five are:

1. Process – Establish a regular process for convening local multi-stakeholder sessions to establish a consensus on tourism development issues and solutions.

2. Marketing – Create and implement an outreach plan to invite and host target market operators and media to experience the district and park.

3. Market Research – Establish and implement a system to improve data collection.

4. Capacity Building – Create and offer a basic tourism development training program for public officials.

5. Promotion and Marketing Plan – Develop and implement a plan that enables local stakeholders to focus efforts on target products and segments.

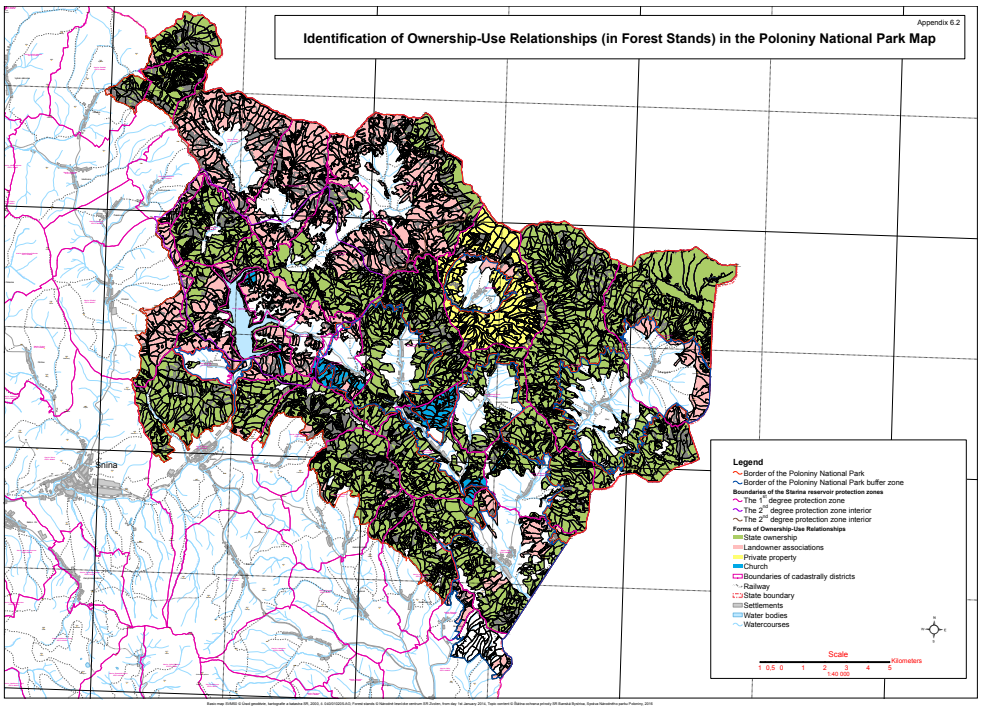
Process: Establish a Regular Process for Convening Multi-stakeholder Sessions

As emphasized above, in the Business Climate Constraints section, creating a local leadership, and a simple tourism development concept with stakeholder buy-in, are critical to developing and sustaining a destination. A process that is developed and consistently applied together with communities in the Snina District, especially in the NPP, would help reach a consensus on the issues and realize possible solutions.

The Regional Destination Management Organization and Tourism Information Center network should serve as the facilitator for this process. The sub-regional DMOs may not have the resources, so the Regional DMO should consider the role of facilitating and maintaining the process within each sub-regional jurisdiction.

Establishing this consensus-building process is especially important when trying to ensure cooperation among the multiple local stakeholder interests. This includes, for example, navigating the multiple ownership use relationships in the park, (as depicted in Figure 17), and working within the bounds of the Ecological Functional Areas specified in the Poloniny Park Management Plan, and on the Figure 1 Ecological Function Areas Map.

FIGURE 17 **Map of ownership-use relationships in Poloniny Park**



Source: Appendix 6.2.201604, Poloniny National Park Management Plan for 2017 – 2026,

Marketing: Invite Slovak, Polish, Czech, Austrian and German Operators and Media to Tour the Park and Region

The Snina district and the NPP have enough natural and cultural heritage assets to present and stimulate further interest. An action plan is needed that specifies specialized operators and media to invite and host from the key target markets of Poland, the Czech Republic, Austria, and Germany. Their visits could stimulate immediate visitor interest.

Both operators and media can be identified via associations such as the Adventure Travel Trade Association, Wanderlust magazine, and the European Cyclists' Federation, as well as key travel industry events, such as, ITB in Berlin, TourNatur in Düsseldorf, and Eurobike.

These familiarization tours are a common tourism marketing and promotion practice. In fact, most destinations organize these, which means that there is tremendous competition between destinations for media and industry attention. A creative outreach plan is needed to recruit media

and operators, and to ensure that follow-up media placements and operator sales occur. This is a critical subject for cooperation among local stakeholders, whose participation is important to the success of these tours.

In addition, the more personalized the tour, the more interaction between the local stakeholders and the tour participants there is, the more effective the tours will be. Local stakeholders, whether it is a 90 year old resident of Ulič who has spent her life there, or the young mayor of Ruský Potok and her family, these are local stories that the media and tour operators want to hear because the market – their readers, viewers, listeners and clients—want authenticity in their travels.

Market Research: Improve the Disaggregated Data Collection System Based on Key Tourism Indicators

As emphasized above, comprehensive tourism data is lacking at the national, regional, district, municipal, and park levels. While arrivals data is generally available based on accommodations overnights, and some spending data can be derived from municipal tax records, it is difficult to determine more precisely visitor spending, activities, and tourism employment. To improve this situation requires coordinated action at all levels. The following are some recommendations for improving this state of affairs:

6. National level – Conduct a needs assessment of tourism-related statistics. The training and technical resources of the UNWTO, which are probably known by these officials, are some of the most useful data available. As a member state, the Slovak Republic has full access to these resources.

7. National level – Update the country's tourism satellite account, which will provide a systematic framework for measuring the direct, indirect, and induced economic impacts of tourism.

8. Regional and local levels – Reforms in data collection at the national level should flow to sub-national levels, again with some training and capacity building.

9. Regional and local levels – A shorter term, more immediate fix, that should be feasible with local expertise, is to establish a regular schedule of visitor surveys, which would provide data on spending, purpose of travel, and interests. Again, some training is needed for both the survey takers and the analysts, and ideally, a multiyear budget.

10. A "smart" approach –Use of a mobile app, perhaps activated via a QR code, and linked to incentives for participating. Also, a lot of data can be gleaned from social media analytics, that is, Facebook, Twitter and Instagram. However, the data from these sources tend to skew toward younger demographics, and thus might miss some key segments. This mobile app might be created through an innovation or start-up competition.

11. Credit card data – This can also be an ideal source of visitor data, depending on the level of card use. Access to this data might be challenging though; a win-win situation needs to be negotiated with the sources.

12. Cell phone data – This has already been done via estimates on SIM card use. Cell tower traffic data can be useful, but privacy concerns might make this a non-starter.

Capacity Building: Provide Basic Tourism Training to Public Officials, and Experience Travel Development to Others

In discussions with public sector officials for this report, it seemed that they could increase their effectiveness in helping to develop and manage tourism in their jurisdictions, with an overview executive education session on sustainable tourism development and management. This could be conducted through the Destination Management Organizations.

BOX 5 UNWTO Executive Education examples

The tailor-made UNWTO.ExecutiveEducation initiatives are offered to a maximum of 45 participants, and may be in any topic listed below or in any other topic of the NTA's choice:

Policy and Strategy	Planning and Management	Marketing	Innovation and Technology	Economy and Investment	Other topics
Tourism Policy and Strategy	Tourism Destinalion Management	Tourism Marketing	Smart Destinations	Understanding tourism in the Naiional Economy	Tourism Aclivity in the Global World
Nanonal Tourism Policy	Sustainable Tourism Destinalion Management	DIgital Marketing	Information and knowledge systems	Tourism Investment Portfolio Development	Introduction to tourism
Tourism Strategy	Tourism Strategic Planning	Current Trends in Tourism eMarketing	Innovation in Tourism	Tourism Investment Portfolio Management	Global Tourism Trends
Tourism Development Strategies	DMO's Management	Market Intelligence	Innovation in Tourism Products	Enhancnig the Local Economy with Tourism	Tourism for Diplomats

For those interested in a more extensive program, the UN World Tourism Organization offers an Executive Education Academy[79] for tourism administration officials from their member states. Their courses range from one day to a full 1 to 2 year Master's degree. Here is a sample of the type of courses that are offered:

Promotion and Marketing: Develop and Implement a District-level Plan

A strategic destination marketing and promotion plan would help focus public and private investment on those assets that are attracting or could attract visitors, and thus, visitor spending. With improved market research, as mentioned above, the plan could focus more precisely on target products and visitor segments. Supported by visitor market research conducted locally and nationally, the following actions are recommended as part of the plan:

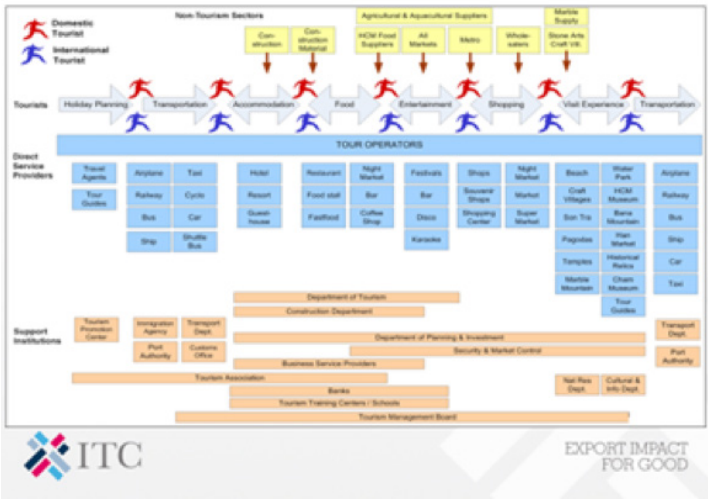
- Identify nature-based and cultural product development prospects that could be presented as investment and business opportunities.

Movie Productions are good for destination marketing

As demonstrated globally, hosting a movie production can often boost tourism to a destination. Some examples include:

- *Frozen* — Norway
- *The Beach* — Thailand
- *Braveheart* — Wallace Monument, Scotland
- *Mission Impossible 2* — Sydney National Park, Australia
- *Star Wars* — Tunisia
- *Lord of the Rings* — New Zealand
- *Game of Thrones* — Croatia

FIGURE 18 **Assessment of tourism value chain and service providers**



- Provide information online and on site that matches specific visitor segments based on an integrated information system.

- Offer local itineraries that enable and encourage visitors to extend their stays at least one night.

- Create a target list of potentially interested domestic and international cultural and nature-based tourism operators.

- Create and conduct targeted outreach campaigns to domestic and international operators.

- Explore the possibility of helping to introduce the Airbnb Experiences program to heritage destinations, with legal registration of providers.

- Cultivate linkages between movie productions and destination marketing – over 100 Slovak and international films have been produced in the Slovak Republic including:
  - *The Last Legion* – Ben Kingsley and Colin Firth
  - *Dragonheart* – Dennis Quaid and Julie Christie
  - *Frankenstein* – Donald Sutherland and Julie Delpy
  - *French Kiss*

A marketing plan with a tourism value chain analysis can also help communities to envision potential income and employment generating opportunities. The following diagram from the International Trade Centre of the World Trade Organization is a helpful reference:

From the point of holiday planning on the left side of the diagram, there are several links along a tourism value chain where services and eventually products, mostly in the form of experiences, activities, hotel stays, meals and so on, are purchased and delivered. Employment, income, and often taxes are generated at each link. For the Snina District and NPP, Figure 18 suggests multiple opportunities to either build on and/or create new services and product offers.

INVESTMENT OPPORTUNITIES UNDER THE EUROPEAN STRUCTURAL AND INVESTMENT FUNDS

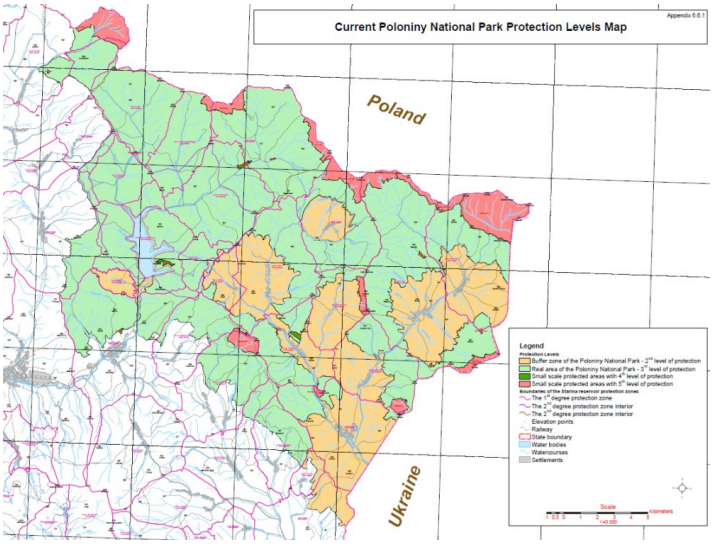
The following three recommendations are all investment and development opportunities that could be supported under the European Structural and Investment Funds, which, given the tourism potential of the Snina District and the NPP, would boost tourism-driven economic development in the region. The first one—creating a thematic Poloniny Park Trail, similar to the Lebanon Mountain Trail—is immediately actionable and, as with the above set of recommendations, offers the possibility of quick wins and benefits. The second and third recommendations require longer-term action and, in varying degrees, are already advancing: to tackle infrastructure gaps related to transport access and secondly, to address gaps in water supply and sewage systems.

Product Development: Create the Poloniny Park Trail and Connect Villages

As with the Lebanon Mountain Trail and the Via Dinarica Trail described above, the Poloniny Park Trail (PPT)would connect communities under a single brand concept, and thus provide a sense of common purpose and integrated product development and marketing, as well as stimulate community-driven development with localized economic benefits. As the Output 1 Report indicated, the district can offer a broad range of activities. A single main PPT can help integrate these activities into itineraries and experience packages. These can include:

> [...] recreational, cultural, creative and multi-denominational faith-focused, spa and thermal bath tourism, military inspired tourism, sports and cycling, hunting as well as rural tourism. More specialized categories such as adrenaline sports, culinary experiences, bird and animal watching, astro-tourism, vacations in search of family or other social ties and nostalgic tourism are also available in PSK. Eco and agritourism which the region is optimally set up for [...].[80]

FIGURE 19 Current Poloniny Park protection zones



Source: Appendix 6.6.01.201604, Poloniny National Park Management Plan for 2017 – 2026

The Lebanon Mountain Trail was designed to help improve livelihoods in villages and other small communities along 470 kilometers of trails from north to south in Lebanon. The project started by mapping the trail and identifying existing and potential tourism-related natural and cultural assets along the trail. In the process, a needs assessment was created as well. Starting with donor funding, the LMT formed a membership-based association to conduct training and assist communities with developing experiential and services opportunities along the trail, similar to what DMOs could do in the SR. As the project and association evolved, it became a means of bringing local communities together within, and with other communities, toward the common purpose of supporting and thus benefiting from the trail.

To move the PPT forward, the convening process recommended above would be a logical starting point, along with a simple strategic action plan that is agreed upon by local community stakeholders.

In Lebanon, as well as with the Via Dinarica in Bosnia and Herzegovina, the entire trail did not have to be completed before marketing and promotion began. Portions of the trail, such as perhaps the Porta Rusica Trail restoration project now underway, could be the foundation for launching the project. It would also act as an immediate lightening rod for generating cooperation, which could then be leveraged towards increased cooperation, as well as be a source of inspiration for entrepreneurship, particularly among young people. In Figure 19, the green zones show where the trail can be delineated.

Address Infrastructure Gaps: Investment in Transport Connectivity

As described above, road, rail, and air access are critical to destination development. Direct rail and air connections with, and improved roads within, the Snina District are lacking. On the one hand, this isolates the district and park from the rest of the country, as well as from neighboring countries, which constrains tourism inflows.

On the other hand, the constraints are potentially positive, if they are used strategically as a marketing tool. However, this should not forestall basic transport infrastructure improvements that upgrade the overall local economy and livelihoods. In fact, tourism is often a catalyst for transport improvements—improve the roads, tourism will flow more easily, and the local economy will benefit.

As mentioned previously, addressing the transport infrastructure gaps should be pursued carefully in accordance with local carrying capacity. The Porta Rusica Trail, for example, should not be a paved highway.

Using the gap as a strategic marketing tool means leveraging a marketing tactic known as the 'scarcity effect'. People place a higher value on something that is scarce, more difficult to access, and a lower value on something that is more easily accessible. If a destination were wide open and easily accessible to everyone, for example, then it potentially becomes a less special experience. The scarcer and less accessible, the higher the perceived value and, potentially, the higher the price that can be charged.

The Kingdom of Bhutan, for example, has used this strategy effectively by restricting the number of visitors, and requiring them to spend a minimum amount per trip.

In pursuing transport access improvements, a balanced approached is required, especially when wild nature destinations such as NPP and the Dark Sky Park around the Kolonica Observatory are involved.

The PSK is preparing an application to EC-funded programs for repairs to second- and third-class roads in the Snina District, following analysis and discussions initiated in parallel with Outputs 1 and 2.

Address Infrastructure Gaps: Investment in Basic Services, Water Supply and Wastewater

As described above, both water supply and waste management are serious infrastructure gaps that need to be addressed in general in order to boost tourism. Access to potable water is a given for many tourism destinations, although many still encourage bottled over tap water use. While the well water that is currently the prevalent source for communities in the Snina District and NPP sometimes suffices, in the district, it is now considered a problematic source due to the inadequate waste water drainage.[81] It is problematic both in terms of health and safety, and it also prevents any tourism accommodations and/or catering establishments from obtaining the necessary permits to operate.

In general, waste management is an infrastructure challenge for the Snina District, specifically, regarding tourism. It is a problem in terms of both sewage as well as solid waste. In addition to the health and safety concerns, sewage and seepage from solid waste potentially affect the groundwater and sensitive waterways, and noxious smells and piles of rotting garbage degrade a destination. Visitors notice and complain about such issues, often over social media, which immediately discourages future visitors.

Following analysis and discussions initiated in parallel with Outputs 1 and 2, the PSK is preparing a feasibility study for solutions on water and wastewater in the municipalities lacking these services in the Snina District.

INVESTMENT OPPORTUNITIES UNDER THE COHESION POLICY PROGRAMING PERIOD 2021 – 2027

The EU Cohesion Policy is intended to bring Europe closer to its citizens and connect local development needs with European and global objectives to stimulate economic, social and territorial cohesion in all the regions. This policy aims to ensure that public investment decisions are taken in as close as possible conjunction with the citizens, and that EU actions are justified in the light of the possibilities and specificities at the national, regional and local levels. The policy is intended to provide not only the necessary investments, but also incentives for more effective governance based on partnership, multilevel governance, and an integrated place-based approach to its programs.

For the tourism-related development needs of the Snina District and NPP, Policy Objective 5 (PO5) of the Cohesion Policy is especially relevant. PO5 is intended to help create a Europe that is closer to its citizens by fostering the sustainable and integrated development of urban, rural and coastal areas and local initiatives. Annex D of *European Commission Country Report Slovakia 2019* provides more context for PO5. The report recognizes that, given the serious disparities between regions and sub-regions in the Slovak Republic, strategies need to be place-specific, particularly for investments in fostering integrated social, economic and environmental development, cultural heritage and security. Some of the most relevant potential investments include:

- Strengthen the partnership principle intra- and inter-regionally, and invest in capacity building and empowerment for local authorities and grass-root organizations.

- Invest in rural areas that are lagging behind by, addressing their infrastructure gap and other identified development needs, consider the depopulation of certain less developed areas (such as "hunger valleys" in the south and east of the country).

- Provide the population with opportunities to boost local growth by benefiting from the existing links with the surrounding urban areas.[82]

To realize these investments, the European Commission recommended several measures, including the following, which can be linked to the recommendations in this report:

- Strengthen administrative capacity based on the development and implementation of the roadmap on administrative capacity building. Such a road map is necessary for the effective administration and implementation of cohesion policy funds, and to foster effective cooperation across government sectors, and among local, regional, and national levels

- Strengthen the capacity of beneficiaries to prepare and implement quality projects, and to participate in the implementation of the funds, in line with the partnership principle;

The following four recommendations could be conducted under PO5 and be linked to the earlier recommendations of this report:

1. Protection, development and promotion of public tourism assets and related tourism services.

2. Protection, development and promotion of cultural heritage and cultural services.

3. Protection, development and promotion of natural heritage and ecotourism.

4. Physical regeneration and security of public spaces.

In addition to conducting these recommendations under PO5, there are opportunities worth exploring of conducting these recommendations under other policy objectives, which could include the following:

Policy Objective 1 – "a smarter Europe by promoting innovative and smart economic transformation" – Digitizing services for smart villages through digital and social innovation.

Policy Objective 2 – "a greener, low carbon Europe by promoting clean and fair energy transition, green and blue investments, the circular economy, climate adaptation and risk prevention" – These investments include improved waste management and recycling.

Policy Objective 3 – "a more connected Europe by enhancing mobility and regional ICT connectivity" – These investments include improved transportation and ICT connectivity.

Protection, Development and Promotion of Public Tourism Assets and Related Services

Government institutions, such as the Destination Management Organizations and Tourism Information Centers, have an important role to play in protecting, developing and promoting public tourism assets, such as NPP, and the multiple cultural monuments and intangible cultural heritage activities. Some of the latter are conducted by nongovernmental civic organizations, but government support, perhaps via PO5 investment, could help sustain them. This is especially true for the 56 cultural monuments in the Snina District, several of which need restoration and maintenance assistance. It is also true regarding the sustainment and improvement of handicrafts, which are declining due to the local brain drain and depopulation of the communities (see below). This is where the partnership principle and "investment in capacity building and empowerment for local authorities and grass-root organizations" mentioned above as a PO5 investment, would be especially helpful.

Support for developing a district-wide tourism marketing and promotion plan, along with helping cultivate public-private partnerships for media and operator familiarization tours, would boost marketing and promotion of the district and park.

Protection, Development and Promotion of Cultural Heritage and Cultural Services

The cultural heritage and cultural services of the Snina District and NPP need support to be preserved and developed for local communities, and as potential tourism assets. As mentioned above, some of the 56 cultural monuments in the Snina District, need restoration and maintenance assistance. It is also true for sustaining and improving handicrafts and the intangible heritage, which are declining due to the local brain drain and the depopulation of the communities that most of the district is experiencing. Younger people are leaving, thus leaving a diminishing population of older people, and increasingly fewer people able to maintain the traditional heritage.

With the initiation of a Poloniny Park Trail, as mentioned above, that is launched with PO5 support, increasing numbers of visitors will become interested in experiencing the cultural heritage traditions and customs, as well as purchasing handicrafts and traditional food items, in conjunction with PO5 investments to boost local growth, by providing opportunities to rural communities. Investing in the local capacity to launch an Albergo Diffuso type approach in their communities, would further help these communities and create new opportunities, especially for younger people.

Protection, Development and Promotion of the Natural Heritage and Ecotourism

The natural heritage and ecotourism of the Snina District are concentrated in NPP, parts of which are protected by law and UNESCO biosphere status. PO5 investments in the above recommendations would help achieve objectives in fostering sustainable and integrated development, contribute to strengthening the local economy, and reduce disparities.

It is a positive development that the Porta Rusica improvements are being supported, but further support will be needed to connect this northern part of the trail with the rest of the trail network throughout the park and district. This could help accelerate the development and benefits of creating the Poloniny Park Trail. Essential to this support—and in line with PO5 investments in applying the partnership principle to empowering local authorities and grass-root organizations—is to also help forge the multi-stakeholder public-private partnership process recommended above.

Also compatible with Cohesion Policy objectives and PO5 investments is the establishment of a National Outdoor Leadership School type of Adventure Center that could serve as a center for capacity building, incubating entrepreneurship, particularly among youth, and attracting more adventure-seeking travelers to the region.

Physical Regeneration and Security of Public Spaces

The Albergo Diffuso approach recommended above has helped promote the physical, economic, and social regeneration of multiple small, and once declining, villages throughout Italy. This model seems adaptable to some of the PSK villages, particularly in Poloniny, where there are many abandoned and deteriorating buildings due to depopulation. By taking a holistic approach to community development and involving as many local residents as possible in offering tourism experiences and services, many communities have been revived and are now prospering. This approach depends on convening local stakeholders and capacity building, as recommended above. It also depends on developing a local business and marketing plan, and connecting the community with others, such as along the NPP Trail. With PO5 support and investments in these activities, some immediate successes, as well as longer-term sustainable development and prosperity, can be realized.

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