"Short profile of the specific functioning of tourism clusters in Slovakia"

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Abstract

The contribution deals with the implementation of cluster concept in the field of tourism in the conditions of Slovakia. Clusters and cluster approach had been a significant phenomenon in the last decades throughout Europe, however, its importance in the conditions of Slovakia has raised just recently. Clusters are established mainly in industry, but they are very popular also in the field of tourism in Slovakia. Mutual cooperation of tourism subjects under the concept of clusters proposes new possibilities and raises the competitiveness of the subjected region of tourism. Clusters of tourism in Slovakia work as the Destination management organizations and bring several positives and benefits to the regions. In the contribution we define cluster policy, map the existing tourism clusters in Slovakia and analyze their contribution for the regions.

Key words: clusters, tourism, cooperation, Slovakia, Liptov, regions. Paper type: Scientific Paper

Research objectives and methodological bases

The issue of formation, development and functioning of tourism clusters in Slovakia dates back to the 90's of the 20th century. In this period, first public associations were established in order to develop specific forms of tourism in given territories. For instance, public association KRTKO united mountain bikers form the suburban areas of Banská Bystrica (specifically in the villages of Králiky, Kordíky, Tajov and Riečka) and besides the domestic and international cyclo-tourist activities, it supported the development of tourism in the territory (in 1991, the first Information agency of tourism was established in Tajov). The aim of the paper is to propose a complete picture of the clusters development – from industrial to tourism clusters and to verify their specifics. The image of clusters should involve both the specific characteristics of tourism and the regional peculiarities in the area of Slovakia.

In the research, we used various available literary sources, as well as historical analyses of the particular tourism clusters formation and development in Slovakia and a short survey. Our own research includes quantification of contemporary tourism clusters and special emphasis was placed on a telephone survey of 146 subjects (municipalities, public associations, companies, agencies of tourism, etc.) in which we were trying to find out the reasons for the termination of some tourism clusters in Slovakia.

Concept of clusters and present state of clustering in Slovakia

Growing global economic integration causes increasing emphasis on the local and regional potential. Clustering of similar businesses existing in a common region brings them reduced

transport costs, barrier elimination, total external savings and collective efficiency. Therefore, nowadays, we draw the attention towards growing importance of regional economics and the place. Real reflection of these tendencies is the phenomenon of clusters. The concept of clusters in economy and regional development was introduced by M. Porter (1990) who started to present them as a basic tool of industrial and regional policy and one of the tools for the competitiveness of regions and states. Clusters are directly connected to innovations, respectively they are a tool of innovation policy. The most popular innovation centres and clusters are: Silicon Valley, Route 128 and Research Triangle in USA; Emilia Romana, Tuscany and Venice in Italy; Montpellier, Sophia - Antipolis, Grenoble and Toulouse in France, corridor M4 between London and Reading and Cambridge in Great Britain; Bavaria and Baden-Wuerttemberg in Germany, north-east of Spain, etc. Industrial clusters are according to M. Porter (1990): "geographic concentrations of interconnected businesses, suppliers, service providers, companies in particular fields and associated institutions such as universities, agencies, trade associations, etc., which mutually compete, cooperate and complete each other."

The representations of cluster reforms are contextually conditioned, it means they change from one state to another and from one region to another. What is regarded as effective and working at one place does not need to fit at another. It is necessary to take into consideration all the features of a region and reflect them in plans formation. What is regarded to be effective and functioning at place, does not necessarily have to be applicable at another. It is, therefore, necessary to take into consideration all local characteristics and apply them in plans development. In the Czech Republic, Slovakia and Hungary the programs for the support of network regional policy and clusters formation have been developed since 2000. The main role in their managing is played by national and regional governments. In conceptual framework of the European charter of small and medium enterprises, Slovakia has also started with the implementation of programs focusing on the strengthening of technological capacity, innovation activity and mutual cooperation of SMEs, public sector and research institutions, mostly universities. Establishment of clusters is at regional level anchored in regional strategic and program documents such as Regional innovation strategies, Programs of economic and social development, etc.

However, cluster policy as such is still missing in Slovakia. There is no legislation that would direct the activities of a cluster, define the forms of cooperation with government and public administration, or cluster financing. Individual institutions work separately and without coordination. The activity of clusters is financed by the membership fees and from the funs of the European Union. External funding for selected activities in the programming period 2007 – 2013 may be obtained from the Operational Programme Competitiveness and economic growth of the Ministry of economy of the Slovakia Republic. The sources are allocated in the priority 1. Innovations and growth of competitiveness, measure 1.2 Support of mutual services for entrepreneurs, which aims to improve the conditions of development and strengthening of SMEs contacts. In November 2009, the minister of economy of the Slovak Republic, promised the creation of cluster policy. The ministry of economy realizes the potential of cluster development. However, no steps have been accomplished in this field so far. The issue of clusters in Slovakia is governed by the Slovak innovation and energy agency - SEIA, under the auspice of the Ministry of economics. It works currently on a ClusterCOOP project, which aims to create and improve conditions for cooperation between clusters in Central and Eastern Europe. It assists clusters to use their innovation capacity, increase their competitiveness so that they could cooperate more efficiently in long-term time spans and enhance their position in the Central Europe region and European economic area.

To promote the tourism clusters, the Act on the promotion of tourism was released. It came into effect in January 1st, 2011. This law should establish the frame for financing the activities in tourism. The rule does not explicitly introduce clusters as actors, but any types of associations. If the cluster initiatives in the field of tourism meet this Act, they may ensure financing for their development.

In 2010, the representatives of technology clusters and clusters of tourism in Slovakia in order to promote, unify and enhance their common objectives decided to establish a joint union – the Union of Slovak clusters. It is the association of legal persons, existing since August 27th, 2012, with its seat in Nitra. The Union has ambition to become a partner for communication not only at national, but also at international level. Nowadays, it groups 8 Slovak clusters and coordinates the preparation of strategic materials in the field of cluster policy in Slovakia.

Clusters in tourism

Clusters in tourism support cooperation of various actors of tourism and focus on the raise of the regions' competitiveness. However, this is more or less the only similarity with the technology clusters. The reason for their difference is the fact that the tourism has different inputs, outputs and specifically structured functional environment. The difference between industrial and tourism clusters is mainly in the following factors:

- 1. Tourism is seasonal
- Tourism has different localization factors (natural attractions, human-geographic attractions, infra- and suprastructure of tourism etc.)
- 3. Tourism can be well-developed even in peripheral regions
- 4. Employees in tourism have different structural qualification
- 5. Products of tourism can even have abstract character (experience, education, culture, etc.)

Clusters, or networks in tourism are typical examples of "knowledge economy" Zdon – Korzeniowska (2009). According to cited author clusters of tourism are the instruments of tourism products development and regional development as well (by means of tourism).

Clusters in tourism can be defined as: "targeted mutual cooperation of actors of tourism products creation and actors of regional development by means of tourism, which simultaneously meets the needs of tourists while supporting business environment in accordance with the moral and environmental regulations of the objective region".

In Slovakia, in the field of tourism, following clusters were identified and really exist:

Cluster Liptov - the association of tourism tries to build a considerable destination of tourism out of the Liptov region with a strategic aim to increase the attendance of Liptov at least to a double in 2013. The association was registered in August, 8th, 2008 and it operates as a Destination Management Organization - DMO. It works as an official marketing and organizational centre, coordinates development of tourism on regional level supporting it as a separate sector in the region. The establishing members are four significant subjects of private sector in Liptov: Thermal Park Bešeňová, Aquapark Tatralandia, Jasná Nízke Tatry and Skipark Ružomberok; together with three towns: Liptovský Mikuláš, Liptovský Hrádok and Ružomberok were the founders of the cluster. In July 2009, another three distinguished members joined the cluster: Travel agency Liptour, Aquatravel and 3W and later also 19 Liptov municipalities. The most significant innovation activity was the implementation of the discount card Liptov Region Card, which enables its holder to visit Liptov and gain attractive benefits for the most interesting and demanding attractions and services of the whole region.

Balnea Cluster Dudince was established in 2008 as the first spa cluster in Slovakia with the aim to coordinate its members in realization of tourism policy in the town Dudince and its surroundings; to provide informational and advisory services; to organize various undertakings and performances for the visitors of Dudince and surrounding; to foster cultural, folklore, social and leisure-time activities in the town. Currently, it has 9 members.

Cluster Orava was established in June 2009 by 9 subjects including ski centers hotels, guest-houses, Dolný Kubín aquapark and Zuberec village and is opened to all the subjects of Orava region. The main aim is the organization of mutual tourism marketing and the offer of tourism products, which is supposed to begin actively in the winter season 2009/2010. Cluster represents and develops the unique brand of Orava.

Cluster Turiec was formed at the same period of time stating the same aims and ambitions. Its founders were ski parks Snowland, Jasenská dolina, Winterpark Martinky, towns of Martin and Vrútky and Fatra Ski travel agency. Paradoxically, famous Turčianske Teplice spa did not join the cluster due to some personal conflicts. In November 2011, the town of Vrútky left the cluster.

Cluster of Novohrad was established within the frontier euroregion Neogradiensis in the district of Lučenec. The cluster is aimed to the development of rural tourism and should contribute to economical and social raise of the region. However, its real existence and activity has been limited to one mutual project.

Cluster of tourism Western Slovakia was formed in 2008 and at present time, they address relevant entrepreneur subjects which might become eventual members of the cluster. In May 2008, municipal body of Banská Bystrica approved the formation of three clusters in tourism: **Cluster of Pohronie** – Hronsek, Vlkanová, Banská Bystrica, **Cluster of winter recreation** – Tajov, Králiky, Kordíky, Banská Bystrica and **Cluster of recreation** - Banská Bystrica, Donovaly, Harmanec. However, funding of the project was rescheduled to 2010. Based on these requirements in May 2011, **Horehronie cluster** was established, it has already realized its first activities in the form of its own web portal, logo, slogan and the regional discount card. It has 10 members, 8 regular and 2 associated (besides other subjects, the municipalities of Brezno, Mýto Pod Ďumbierom a Čierny Balog are participants).

At the same time, the first city **cluster of Košice** was established focusing on the development of tourism in the Košice city. It has been working since June 2010 with the ambition to use the increased number of tourists in connection to the Ice Hockey world championship 2011 and the project of European city of culture 2013.

At the beginning of 2012, the formation of **cluster Košice – Bratislava** was announced. It should be focused on the creation of mutual products of tourism (domestic and foreign). Cluster Košice – Bratislava will logically strengthen the westeast axis of tourism development in Slovakia, while the new tourism products should be complementary.

The castle museum in Filakovo in the collaboration with the Hungarian Association of castles of the Upper Hungary within the program of Cross-boundary cooperation of Hungary and the Slovak Republic wants to establish **Cluster of border castles in southern Slovakia**. According to Attila Agocs, the director of the Castle museum, the cluster should represent mutual interests of castles in southern Slovakia, coordinate their professional cooperation, create mutual programs, to harmonize and consult their offer.

Cluster Tatry – the relevant providers of services in the field of tourism in the High Tatras – 1. Tatranská, Tatranské lanové dráhy and Aquacity Poprad – and the towns of Vysoké Tatry, Poprad, Svit and Štrba agreed on the foundation of Tatry cluster. Expected date of establishment of the cluster was March 2010, however, there have been no activities realized in this field.

The first rural cluster in Slovakia **Cluster Smolenice** was established in March 23^{rd} 2010. It has 25 members and the motivation for its establishment was the organizations of distant management in Austria, Moravia and Slovakia. So far, it has implemented several activities aimed at promotion and it also has its own website.

Assessment of clustering in tourism, and its contributions for a region.

In the following part, we will try to evaluate existing clusters in tourism in Slovakia on the basis of our theoretical knowledge and classifications. All the clusters of tourism in Slovakia are initiated and organized from the outside, i.e. they are top-down clusters. We also call them constructed clusters.

The main initiators and founders are private companies, autonomous regions and cities and towns. In comparison to other EU states, Slovakia lags behind in number of cluster initiatives and particularly in the efficient operation of existing ones. In Slovakia, there are 10 declared clusters of tourism, however, only 7 of them are really functioning. Clusters consist of fewer members than it is typical for developed European countries. The linkages between these associations and universities, research institutions and secondary or high schools of this kind, is very weak, respectively absolutely missing.

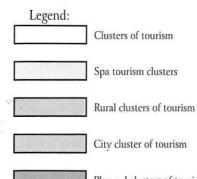
Based on the classification according to industrial structure, most of the clusters are horizontal, formed by manufacturers and service providers who do not cover the entire value chain. According to the development degree, 7 clusters have growing tendency, therefore, we observe their targeted as well as spontaneous development, investments in marketing and development and consequent cluster expansion, 2 clusters are embryonic, it means they were established just recently and their active collaboration has been initiated, another 2 clusters are planned (see map 1).

Almost all of the growing clusters have their own website which informs about the cluster activities, strategies and proposals. In terms of geographic scope respectively size, all the clusters are regional, it means that their members are located in the same region, which is typical for the field of tourism. The strength of the competitive position is national, although we admit that Liptov cluster is significantly shifting towards nationwide or even international level by its marketing and promotional activities.

1/2012

Table 1: Types of tourism clusters in Slovakia

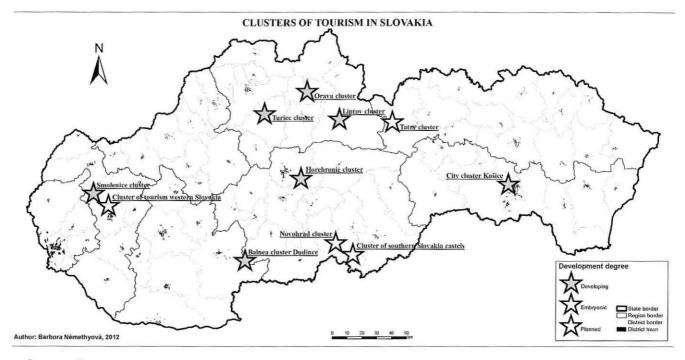
| TITLE | REGION | SEAT | DATE OF ESTABLISH- MENT | LEGAL FORM | SCOPE | MEM- BERS | FUNDING |
|--|--------------------------|----------------------|-------------------------------|---|--------------------|--------------|------------------------------|
| Cluster LIPTOV | Žilina | Liptovský Mikuláš | 8.8.2008 | Interest association of legal entities | regional | 29 | EU funds, membership fees |
| Cluster of tour- ism WESTERN SLOVAKIA | Trnava | Trnava | 1.12.2008 | Interest association of legal entities | regional | 5 | membership fees |
| Cluster ORAVA | Žilina | Dolný Kubín | 5.8.2009 | Interest association of legal entities | regional | 14 | membership fees |
| Cluster TURIEC | Žilina | Martin | 26.6.2009 | Interest association of legal entities | regional | 5 | membership fees |
| Cluster HOREHRONIE | Banská Bystrica | Brezno | 6.5.2011 | Interest association of legal entities | regional | 10 | membership fees |
| Balnea Cluster DUDINCE | Banská Bystrica | Dudince | 6.6.2008 | Civic association | regional/ local | 9 | membership fees |
| Cluster SMOLENICE | Trnava | Smolenice | 23.3.2010 | Interest association of legal entities | regional/ local | 25 | membership fees |
| NOVOHRAD- SKÝ Cluster | Banská Bystrica | | 1.5.2009 | | regional | ? | EU funds, membership fees |
| Cluster KOŠICE | Košice | Košice | June 2010 | Interest association of legal entities | regional | 28 | membership fees |
| Cluster TATRY | Prešov | Poprad | planned | | | | EU funds, membership fees |
| Cluster of border castles in south- ern Slovakia | Banská Bystrica | | planned | | | | |
| Košice-Bratislava | Košice and Bratislava | Košice | planned | | | | |



Planned clusters of tourism

Source: authors

Map 1: Clusters of tourism in Slovakia



Source: authors

Clusters of tourism look like a very effective form of cooperation and their success is proved not only by the most successful cluster Liptov, but also by the increasing number of such associations. Their contribution to the regions is undeniable. They enable their members increase competitiveness and more effective activity by means of specialized suppliers, knowledge spill-overs within the cluster and higher pressure on innovations and mutual marketing strategies. They cumulate savings from cost-sharing and investments and labor power. They open new markets and improve the image about a region. Clusters do not only stimulate economic growth, but also directly create wealth in the region. In this way, they increase the income of inhabitants, reduce the unemployment and create a competitive advantage of a region, which allows weaker players to participate in economic development.

In final evaluation of cluster policy, it is necessary to state objectively that Slovakia significantly lags behind in clusters formation and their development. One of the reasons not to engage themselves in such initiatives is the lack of confidence (lack of milieu of trust) by private actors and the refusal of mutual cooperation and common goals as a result of the fear of losing their own business strategy in favour of common know-how. The problem of regional development actors is the low level of mutual communication, collaboration and partnerships in defining common goals, visions and resulting actions. In addition to their mutual mistrust, distrust towards moral and professional qualities of politicians and the politics as such arises. Another problem regarding Slovak cluster policy is the question whether the defined clusters are real clusters. As they usually appear in forms of various associations with low cooperation and coordination, they do not bring synergic effects and comparing them with the advanced western European clusters, we would come to the conclusion that most of them are not clusters at all.

An important factor of the functions of tourism clusters is their economic and socio-cultural environment, which was formed in the specified region of tourism. This influence is described in the Table 2.

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Table 2. Cluster and its impact on the region

| Attribute | Cluster | Region of tourism | | |
|--|---|--|--|--|
| Spatial concentration | determinations by limited a product socio – cultural factors geographic proximity/remoteness of clients and customers | determinations of natural and anthropogenic valorities of tourism infra and supra-structure bases of tourism (development of so called "green field" centers) | | |
| Economic specialization | limitations by products sectoral limitations , or limitations of similar fields | limited demand heterogeneity of tourism position on the market specified by a product of tourism | | |
| Dominance of small and medium enterprises | fragmentation strong specialization | fragmentation great typological diversity large specialization | | |
| Organization | open and elastic structure strong specialization of subjects and local share of the work principle of chaining technological – productive factors effects of concentration | open and elastic structure representation of regional products of tourism principles of chaining the valorities in tourism integration effects of tourism potential, tourism activities and tourism products | | |
| International relations cooperation/ competitiveness | - informal cooperation - mutual transfer of specialized knowledge, skills, information and labor - competition based on quality and innovations - rooted traditions of local economy - rooted local-patriotism and regional identity in local economy | - informal of relations - limited transfer of information - competition based on the quality and innovations - rooted traditions of local economy - rooted local-patriotism and regional identity in local economy - functioning of tourism not only for economical reasons | | |
| Institutional support | active and direct support of local and regional bodies operation of institutions in market environment significant support of research-development institutions active assistance of local bodies | direct activities of local bodies indirect activities of local bodies PPP partnerships functions of institutions in market environment partial support of research-development institution | | |
| Profits | product integrity product size and importance export capability local activity, global competitiveness | integration of regional products of tourism secondary importance of regional tourism products secondary importance of production size for the development of a region export potential as a type of activity | | |

Legend: Bold letters represent regional characteristics which prevail in clusters of tourism Source: Adapted according to Nawrot , Zmyślony 2009

The analyses prove that in Slovakia, some inevitable factors of tourism cluster development absent; such as: contribution of research – development institutions, direct activity of local and regional bodies, local-patriotism represented in local economic products (and products of tourism), open elasticity of sociocultural environment and last but not least the ability to develop tourism with non-economic motives. In the research, we have verified the fact that Slovakia is interested in developing cluster activities especially for its lucrativeness hidden in direct and indirect subsidies. It is doubtful whether the clusters would be further established even without these subsidies.

The research also shows that in Slovakia financial profits outweigh non-financial at clusters establishment but also at their cessation because the lack of financial sources is usually the main motive for clusters downfall. The lack of financial sources would probable cause the cessation of the only spa cluster Dudince.

The results also involve the specific networking of tourism organizations on the basis of legal form of public association. From a purely theoretical point of view, they are not typical clusters because the driving force of those associations is represented by a few individuals who are intentionally connected under mutual local vision of tourism development for example: construction of a bike park, construction of a nature trail, protection of natural environment, promotion of ecotourism and the like. If we enter into http://google.sk the password "Civic association of tourism", we generate about 1 630 000 link, however, only about 150 are real subjects. Most of them are introduced only due to the commercial needs. They miss character of real clusters mainly as a result the lack of wider networking among subjects, absence of cooperation with regional bodies, absence of the concept of tourism development and finally the absence of real practical activity.

Summary

Clusters of tourism look like a very effective form of cooperation and their success is proved not only by the most successful cluster Liptov, but also by the increasing number of such associations. Their contribution to the regions is undeniable. They enable their members increase competitiveness and more effective activity by means of specialized suppliers, knowledge spill-overs within the cluster and higher pressure on innovations and mutual marketing strategies. They cumulate savings from cost-sharing and investments and labour power. They open new markets and improve the image on a region. In Slovakia, there are 10 tourism clusters from which 7 are really working efficiently. In the contribution, we characterized cluster policy, analyzed individual clusters, and proposed suggestions of clustering for the regions. In the research, we have verified the fact that Slovakia is interested in developing cluster activities especially for its lucrativeness hidden in direct and indirect subsidies. Therefore, it may happen that most of the existing clusters will be ceased when the funding finishes.

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