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THE IMPACT OF TOURISM DEVELOPMENT POLICY ON THE REGIONS OF HUNGARY

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Abstract. The aim of this paper is to give an overview on the development of tourism development policies in Hungary, over the past two decades. The topic is considered really important, since the paper proves that tourism in Hungary – at policy level – has not received enough focus so far. It has been the part of various economic and social development strategies, but there is not even specific legislation for the sector. In the paper, the evolution of tourism policies is detailed, proving that even policy-makers do not consider it as an individual sector of the economy.

Nowadays, when rural areas intend to identify their specific development goals and try to define their own strategies, tourism is preferred in many cases as a possible way to get out of the lagging behind status. However, tourism – as a type of industry – requires well-established economic background and qualified human resource, in addition to the touristic attractions. Therefore, tourism might not be the way to success in many rural regions which do not possess the required resources.

Key words: regional development, tourism infrastructure, tourism development strategies, active tourism, health tourism, cultural tourism, ecotourism, new Hungary Development plan, touristic destination management.

Hungary has unique natural and cultural treasure in Europe, so tourism has always played significant role in the national economy. From touristic point of view, the competitors of Hungary are primarily the countries in the CEE region (e.g. Slovakia, Czech Republic, Poland, Austria), however, due to the easier access to transportation networks, the countries of the whole world can be considered as competitors. The contribution of tourism to GDP in accommodation and catering sectors has shown gradual increase in the past 15 years, but still it is not the key for rural areas, since tourism sector is highly concentrated in the capital and in the area of Lake Balaton. So, overall, it may show further increase in such areas, but we do not have sufficient information about the tourism potentials of rural areas which would need help in boosting their economies to avoid the break-off.

Tourism development in the development strategies of Hungary. Conscious and complex tourism development policy in Hungary started in 2000, when 9 touristic regions were defined (Figure). However, such touristic regions consist of areas of similar touristic characters, but they do not fully match any other regional structure or public administration units of the country, which makes it really difficult to harmonize their development with other economic, social and environmental policies. The two most-visited destinations of Hungary are the capital and the Lake Balaton, the vast majority of the income generated in tourism comes from these areas, thus tourism sector shows a high territorial concentration. Each region has its own tourism development strategy

and the tourism development actions in the regional operational programs have been elaborated accordingly. Since there is a great variety of touristic resources, the touristic supply in Hungary is also various [14].

As it is mentioned above, Hungary has numerous hidden potentials in tourism. Resources and attractions are available throughout the country, which either individually or linked offer wide range of possibilities:

1. Health tourism: Hungary is the land of waters with huge water supply both over and under that surface. Bath culture of centuries and the thermal water are competitiveness factors, thus this sector may be the most attractive internationally. The sector also gets high priority in development policies.

2. Ecotourism: diversified living creatures, landscape and natural endowments generate active tourism. Hiking can be more attractive if visitor centers, related services, additional programs, sport facilities are also available.

3. Active tourism: to do active tourism, there are several opportunities in Hungary. Most of them are related to natural conditions, though they require significant infrastructural background. A popular form is linked to water. In addition to swimming, there are various water sports (sailing, kite, kayak, canoe, rowing). Horse-tourism also has long traditions, equestrian farms and horse-touristic services can be found all over the country. Cyclers may also find perfect landscape in the country.

4. Cultural tourism: the UNESCO awarded the world heritage title to 10 cultural values of Hungary.



Touristic regions of Hungary *

Source. Made using the data: [11]. * – Nyugat-Dunántúl (Western-Transdanubia); Közép-Dunántúl (Central-Transdanubia); Balaton (Lake Balaton); Dél-Dunántúl (Southern-Transdanubia); Budapest-Közép-Dunavidék (Budapest, the capital and Central Danube region); Észak-Magyarország (Northern Hungary); Észak-Alföld (Northern Great Plain); Tisza-tó (Lake Tisza); Dél-Alföld (Southern Great Plain)

However, in order to keep the other architectural and cultural heritage competitive, cooperation with further attractions as well as creating complex touristic packages are inevitable.

5. Gastronomic traditions: several foods and meals are characteristic to the regions (e.g. cabbage from Vecsés, plum from Szabolcs), but the most famous is the wine and pálinka (fruit-spirit) – culture. Domestic and foreign tourists are really interested in wine culture, wine routes. Gastronomic tourism has strong relationship with rural tourism, folklore and intellectual heritage.

6. Event- and conference tourism: organizing event, festivals, conferences provide mainly regional attractiveness. Regular programs and events may result in increasing number of tourists, even that of the foreign ones. Though events may prolong the season, they require coordination, the expansion with programs in the countryside as well as conscious marketing campaign. Successful conference tourism requires significant investments in infrastructure and in transportation as well. In order to maintain sustainability, there should be cooperation with additional attractions and service providers [14].

Tourism in Hungary – despite of the efforts of the professionals – does not have specific legislation yet, still it is included in various policies. Development strategies and policies for tourism development are listed below to prove how much it is connected to any other economic and social development.

Széchenyi Plan: in the coordination of the Ministry of Economy, the Széchenyi Plan was prepared by the second half of 2 000 including 7 programs. Due to its increasing significance, tourism development chapter was one of the most important in the Plan. The aim of the tourism development program was to improve the quality of tourism, through the improvement of international competitiveness, the stabilizing role of domestic tourism, the more balanced distribution of tourism performance over the year and the moderation of the territorial concentration. Moreover, it defined such ways and methods through which it does not have negative impacts on the natural and cultural environment of the country [3].

The tourism program had 7 sub-programs (health tourism congress tourism, touristic thematic parks, cultural tourism, equestrian tourism, additional high quality touristic products and touristic information systems), out of which the health tourism developments had outstanding significance. In order to make our resources suitable to meet both foreign

and domestic demand, high quality complex touristic investments are necessary that meet even the international expectations and require huge capital [7, p. 32–49].

In details, it aims – using state budget funds – to carry out a complex and aligned development of the tourism, by promoting the high quality tourism, expanding the number of visitors, widening the range of health touristic services, prolonging the touristic season as well as mitigating the seasonal fluctuations, thus increasing the number of tourists and improving the health condition of the population. Projects in tourism aimed at establishing health tourism centers of high quality, offering marketable services (thermal baths, healing caves, natural CO₂ therapy places), developing their infrastructure, environment and accommodation. Health touristic investments were granted the largest amount of state funds in the framework of the program [3].

1st National Development Plan: for the years 2004-2006, the strategic objective was to moderate the inequalities between Hungary and the EU member states, as well as the creation of jobs to improve the competitiveness of regions, social cohesion through human development and the promotion of balanced development between the urban and rural areas, taking sustainability and equal rights into account. Such aims were supposed to be achieved in 5 operational (sectoral and regional) programs [13]. Tourism development was included in the latter one as an individual priority, backed by two concrete actions, namely the improvement of competitiveness of touristic attractions as well as the development of touristic services. The distribution of touristic funds among the regions was decided based on the needs to moderate the differences among the regions [6].

According to the statements in the plan, there are unexploited potentials in tourism at the moment, thus several measures have to be taken to achieve success. Major statements of experts as follows:

- There are unused, unexploited capacities in tourism.

- There is a lack of sufficient touristic services and sights.

- Tourism in Hungary concentrates in Budapest and the Lake Balaton, since 58 % of the tourist nights are spent in these places. Others do not have accommodation in the required quality and quantity.

- Touristic supply is rather seasonal.

- The average expenditure per capita and the number of nights spent are low.

- Workers in the tourism sector do not have the appropriate skills and abilities [8].

In areas excluding the current touristic centers, there is a lack of appropriate touristic infrastructure, there is a limited range of services offered, the number of high quality accommodation is low and there are no complex touristic products available. Though Hungary is rich in attractions, their management is not sufficient and the proper marketing is also missing. Touristic attractions are usually developed separately; their marketing is not harmonized, halting the interaction of attractions. Due to such shortages, there is a high concentration in time as well, since 45 % of the tourist nights are spent between June and August. Professional and guest-oriented approach is inevitable to develop the tourism further, thus the human resource development is really necessary [8].

National Tourism Development Strategy: it was prepared in 2005 for the years until 2013. The aim was to improve the quality of life through tourism. The background documents included numerous important facts about the sector as follows: most of the touristic enterprises in Hungary are SMEs; the sector faces a lot of problems: inappropriate price/value rate, the lack of complex services, the low expenditure per capita; high territorial and seasonal concentration; neighbouring countries are strong competitors [12].

Pillars of the Strategy: 1) competitive, sustainable development; 2) infrastructural and touristic infrastructural investments; 3) product and destination development; 4) human resource development; 5) institutional system [10].

The Strategy has overall, specific and horizontal objectives. The overall objectives are human-centered and profitable development in long terms, the improvement of the conditions, attraction-development as well as the establishment of an efficient institutional system. The Strategy was financed from state, EU and private sources [2, p. 47–51].

National priorities of tourism development:

1. Health tourism:

- wellness tourism to maintain the health condition and to prevent the illnesses;
- healing tourism to improve the health condition and to heal illnesses.

2. Heritage tourism:

- tourism based on the preservation and introduction of world heritage and national parks, cultural heritage;

- equestrian tourism;

- rural tourism;

- gastronomy and wine-tourism;

- tourism of great events.

3. Congress tourism:

- establishment of facilities in Budapest to host congresses with thousands of participants;

- state-supported lobbying to attract international congresses to Hungary;

- stronger marketing activity of congress venues in Budapest and in the countryside.

In addition to the national priorities, regional priorities also have to be defined based on the local conditions [12]. According to the approach of the Strategy, tourism is not only a sector in the economy any more, but it is an essential part of our life. Approaches applied in the Strategy are the involvement of local actors and the promotion of bottom-up initiatives. They are reflected in the job creation, rural development activities of tourism as well as in keeping the population in the rural areas. Tourism may have important role in income generating in the agriculture-dominated areas. The Strategy, however, covers the territory of the whole country – including the regions lagging behind – it makes it clear that tourism is justified only in areas with sufficient conditions. In rural tourism, the strengthening of relationship between tourism and agriculture was emphasized, yet the reconstruction of settlements and villages is necessary. A key priority was given to the use of local raw materials and products in tourism [1].

New Hungary Development Plan (2nd National Development Plan). According to the Plan, the most important aims of Hungary between 2007 and 2013 were to create new jobs and to create facilities for long-term increase. The Plan was divided into 8 sectoral and 7 regional operational programs. Tourism-related developments were planned mainly in the regional operational programs. They represented approx. 17 % of the funds to be spent. However, other operational programs, e.g. economic, environment and energy, rural development also contributed to touristic developments. Indirect interest of tourism can be observed in sectoral programs, like spatial infrastructure, e-public administration, enterprise-development as well as vocational trainings [4].

Major objectives in the regional operational programs:

- improving the economic competitiveness of regions;

- increasing the touristic attractiveness of regions;

- development of regional and community transportation infrastructure, improving the local environment condition;

- promotion of energy-efficiency and saving, the use of renewable energy sources;

– overall, integrated development of settlements;
 – moderating the social and spatial inequalities within the regions;

– development of social infrastructure [15].

Priorities of the regions:

– Dél-Alföld (Southern Great Plain): health-, thermal-, active-tourism;

– Dél-Dunántúl (Southern Transdanubia): healing- and thermal-tourism;

– Észak-Alföld (Northern Great Plain): through the development of touristic products, to become a high quality life-, health- and recreation center of Central-Eastern Europe;

– Észak-Magyarország (Northern Hungary): tourism based on unique characteristics (forests, mountainous landscape, historical wine regions, world heritage places, nature protection areas);

– Közép-Dunántúl (Central Transdanubia): restructuring attempts to build on existing attractions, outstanding historical and natural values, introduction of innovative touristic products;

– Nyugat-Dunántúl (Western Transdanubia): health-, cultural-, eco-tourism [12].

Since only 6 regions of Hungary fall into the category of convergence regions (according to the EU nomenclature – GDP per capita is under 75 % of the EU average), the region of Central Hungary (including the capital) is not eligible for certain funds in the development plan.

Touristic Destination Management (TDM).

In 2009, a call for tenders was published to support the TDM organizations. Tenders were supposed to support local and regional TDM organizations in realizing their programs to improve the competitiveness of tourism and to create a structure with appropriate management competencies. The aim was to establish a uniform, harmonized organizational structure at regional and national level. It was the first time that funds were available to develop touristic organizational structure. Due to the professional use of funds, the cooperation between the business, civil and local government sector may be stronger, eventually leading to the increase in the quality of touristic services. Apart from this, several other central measures also contributed to the restructuring, e.g. the establishment of the TDM informatics system, electronic materials, statistical data, guidelines as well as TDM coordinator activities [4].

According to the Strategy, the touristic activities of a given settlement or region are carried out by the local TDMs, which “deal with the collaboration of local population, municipality, touristic service providers as well as the development and promotion

of the local touristic products and services”. Such bottom-up organizations can be considered as collaboration forums of tourism service providers. They play significant role, since they create cooperation, and the service providers may have direct relationship with the tourists, knowing their demand. It is only such organizations that may have real advantage compared to traditional touristic organizations [2; 5].

New Széchenyi Plan – Healing Hungary – Health-industry program. The New Hungary Development Plan was followed by the New Széchenyi Plan in January 2011, which had 7 key priorities, including the Healing Hungary – Health-industry program, with special focus on health tourism. The rest of the key programs (green economy, housing, enterprise development, science-innovation, employment, transportation) also had touristic linkages [4]. They all integrated various industries and sectors, leading to competitive products and services even in middle-terms.

The Program, on one hand, aimed at a more efficient use of thermal water reserves and geothermal conditions, on the other hand, harmonized system of industries which preserve health and promote health-conscious lifestyle. A focal point of the Program was a complex use of thermal water supply and to create a uniform structure of the related products and services. Consequently, it had several links to other sectors of the economy. The Program did not aim at the financing and restructuring of the Hungarian healthcare system, but it intended to use the worldwide unique thermal water supply in a complex and sustainable way, creating synergies among the sectors.

Major objectives of the Program:

– *Catching-up of areas lagging behind:* complex economic and social development programs for underdeveloped areas where there are only a few cities and usually near the borders of the country.

– *Complex use of geothermal energy:* it includes the energetic use of high and low temperature thermal water before and after healing, economical and sustainable energy use, the reduction of energy-dependence as well as the self-sufficient energy supply.

– *Protection of natural endowments, maintaining their quality:* health tourism can be based on the favourable natural conditions, and human resource. To provide the basic requirements of long-term international competitiveness, special focus should be put on the protection of the water-basis, regular control and quality assurance of healing pools, the promotion of water use and reuse, introduction

of modern technologies as well as the revise on quality brands.

– *Long-lasting increase in the country's competitiveness*: most of the sectors in the health industry contribute to the supply of products and services. Such a “national industry” may be created that may provide strategic advantage and specific to our country. It creates numerous jobs, makes a lot of income, thus increases the national gross output.

– *Knowledge-development*: in order to improve the quality of health industry and health tourism, the expansion and development of professional knowledge are inevitable. Experts with information about international trends are expected to bring the need for introduction of new technologies [16].

Two major parts of the program: one is about health industry-based tourism, the other is about thermal health industry. The key priority of the first one is to create the framework and the institutional system for health touristic products and services, aiming at the maintenance of the health of both the body and the soul. The second aims to discover all the possible ways of using the thermal-, healing- and mineral water, as well as the relations to other sectors. It aims to find out what innovation can be carried out based on health industry and to define the “background” sectors that serve the development of the industry [4].

National Tourism Development Concept (2014-2024). According to the Concept, Hungary is expected to be the most popular destination of Europe in health tourism by 2024. In order to get the supply to the market, efficient, well-organized and strategically managed system of incentives is necessary, including the country-brand and the national marketing activity.

Tools to achieve the desired aims: innovative and creative high quality products and supply; creation of an environment that improves the competitiveness of the tourism in Hungary, job creation; restructuring of the institution system of tourism based on the TDM system; opening to international markets, to the Eastern countries by international marketing and by using incentives.

The Concept also includes product-specific priorities as follows:

– health tourism – touristic products based on the complex development of bath destinations providing medical services;

– heritage and cultural tourism – major national and cultural heritage promoted as touristic attractions by establishing thematic routes and visitors' centers;

– MICE-conference tourism – establishment of one large congress center and the conscious expansion

of further conference facilities, strengthening the professional tourism character of Hungary;

– religion tourism – complex development of pilgrimage routes and touristic networks which can be known even Europe-wide;

– festivals, event – marketing of national or regional events into the international market;

– development of national gastronomic networks and important festivals, matching the region-specific traditions, cultural and historical conditions;

– ecotourism – complex development of ecotouristic destinations, creation of visitors' center in national parks, organizing events and exhibitions;

– bicycle tourisms – complex development of bicycle routes by exploiting the territorial differences;

– water tourism – establishment of port networks meeting the international standards, development of water tour bases, harmonizing them with bicycle tourism;

– equestrian tourism – complex development of equestrian touristic centers, increasing the interest of domestic tourists in equestrian tourism, creation of routes that can be interesting for foreign tourists as well;

– village- and agrotourism – development of village and rural touristic attractions and services by diversifying the supply based on local values, cultures and traditions [9].

Expected results due to the realization of the objectives by 2024:

– the GDP contribution is expected to increase to 10 %;

– the number of registered employees in tourism sectors is expected to increase by 50 %;

– Hungary is expected to be among the top 30 in the world, regarding competitiveness;

– statistics on domestic tourism is expected to increase by 30 %;

– the number of foreign visitor nights and average spending are expected to increase by 50 %;

– penetrating new markets in harmony with the Eastern opening strategy [9; 11].

Conclusions. Based on the overview on the major economic policies of the past two decades in Hungary, it is clear that tourism has always been present in the policies but somehow as a secondary priority. According to some experts and strategies, it is only one sector in the economy, while others say that it should be dealt with as an individual, gradually increasing activity in the economy. It is because Hungary has favourable conditions for various types of tourism. Still, it must be forgotten that tourism requires high quality resources (not only regarding the natural endowments, but e.g. the human resource

and the quality and availability of services). As it is seen from the strategies, tourism was always important, but not a strategic sector.

Due to the last tourism development strategy (effect until 2024), tourism can find its real role in the economic and social development of the country, thus making it more competitive in the global market. Tourism has already had great impact on the development of regions, but we believe that it could have been greater if it had been elaborated in a harmonized and structured way. Each region has great potentials for tourism, however, it must not be the number one industry in regions lagging behind where there is a lack of necessary infrastructure. In such areas, the short-term strategies should focus on the basic infrastructure and business environment and only later on may come tourism.

Since tourism is an intersectoral activity, meaning that various products, services, sectors are either directly or indirectly have connection with tourism, thus it is really difficult to measure its real role and efficiency in the economy. The authors of this paper have done researches on finding the appropriate methodology to measure the impacts of tourism on the economy, society and environment. Therefore, it can be stated that tourism is not only intersectoral, but multidimensional as well. Since tourism is getting more and more significance worldwide, it is really needed to see how the countries manage to define their tourism development strategies (justification of this paper). The authors are working on an overview about the international practices concerning tourism policies as a continuation of their research.

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ТУРИЗМ КАК ФАКТОР РАЗВИТИЯ РЕГИОНОВ ВЕНГРИИ

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Аннотация. Цель статьи – дать обзорную информацию об изменении подходов к формированию стратегий развития туризма в Венгрии за прошлые два десятилетия. Туризм в Венгрии не приобрел пока самостоятельной стратегической значимости. Это направление являлось лишь частью различных стратегий экономического и социального развития центра и регионов при отсутствии четкого законодательства для этого вида деятельности. В данной статье в критическом аспекте показано изменение подходов к политике в области туризма и констатировано, что, к сожалению, даже влиятельные политики не рассматривают его пока в качестве стратегического значимого для развития регионов Венгрии вида деятельности.

В современных условиях, когда сельские территории пытаются скорректировать свои цели развития, воплотив их в стратегиях, туризм становится одним из приоритетных направлений, развитие которого способно повысить социально-экономический статус территории. Однако туризм как вид хозяйственной деятельности требует известного экономического фона и квалифицированных человеческих ресурсов в дополнение к туристическим достопримечательностям. Поэтому следует объективно оценивать потенциал развития туризма для сельских районов, не обладающих подобными ресурсами.

Ключевые слова: региональное развитие, инфраструктура туризма, стратегии развития туризма, активный туризм, медицинский туризм, культурный туризм, экологический туризм, новый План развития Венгрии, управление развитием туризма.