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**Faculty of Economics and Management
Department of Management**



Diploma Thesis

**Evaluation of Strategy for Tourism Development in the
Vysočina Region for the period 2008 - 2013**

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DECLARATION

I hereby declare that I have worked on my diploma thesis titled “Evaluation of Strategy for Tourism Development in the Vysočina Region for the period 2008 - 2013” individually and I have used only the sources listed in the references.

In Prague on 1st April 2011

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**Evaluation of Strategy for Tourism Development in the
Vysočina Region for the period 2008 - 2013**

Zhodnocení Strategie rozvoje cestovního ruchu v kraji
Vysočina na období 2008 - 2013

Summary

The aim of this thesis is to evaluate the Strategy for tourism development in the Vysočina Region for the period 2008 – 2013 (Strategy). The evaluation is made in the middle of specified period and thus only the first three years were considered. Firstly, literature overview provided the theoretical background of strategy evaluation, the specifics of strategy formulation in tourism were explained, and tourism development in a region including the instruments for development of tourism was described. Secondly, the Vysočina Region was introduced and briefly analyzed in terms of its tourism potential. The strategic document of *Strategy for tourism development in the Region Vysočina for the period 2008 – 2013* was presented. Thirdly, two key arrangements defined in the Strategy that were included in the evaluation were selected. Several indicators by which these arrangements were evaluated were set. These indicators were quantified and results of these quantifications enabled the evaluation of how selected arrangements were fulfilled during the specified period. Finally, the role of tourism in the economy of the Vysočina Region was evaluated. All results and findings were discussed and possible adjustment of the Strategy was suggested.

Key words: strategy evaluation, tourism development, tourism infrastructure, tourism potential, the Vysočina Region

Souhrn

Cílem této práce je zhodnotit Strategii rozvoje cestovního ruchu v kraji Vysočina pro období 2008 – 2013 (Strategie). Zhodnocení bylo prováděno v polovině daného období, tudíž zahrnuje pouze první tři roky. Teoretická část práce nejprve objasnila teoretická východiska hodnocení strategie, specifika tvorby strategie v cestovním ruchu byla vysvětlena a rozvoj cestovního ruchu v regionu byl charakterizován včetně nástrojů pro rozvoj cestovního ruchu. Následovala základní charakteristika kraje Vysočina a stručná analýza jeho turistického potenciálu. Strategický dokument *Strategie rozvoje cestovního ruchu v kraji Vysočina pro období 2008 – 2013* byl představen a byla vybrána dvě klíčová opatření, která byla zahrnuta do zhodnocení. Následně bylo určeno několik ukazatelů, s jejichž pomocí byla vybraná opatření zhodnocena. Tyto ukazatele byly kvantifikovány a výsledků těchto kvantifikací umožnili zhodnocení, jak byla vybraná opatření naplňována ve sledovaném období. Závěrem byla zhodnocena role cestovního ruchu v celkové ekonomice kraje Vysočina. Výsledky a poznatky byly projednány a byla navržena možná úprava Strategie.

Klíčová slova: zhodnocení strategie, rozvoj cestovního ruchu, turistická infrastruktura, potenciál cestovního ruchu, kraj Vysočina

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1. Introduction

Travelling is getting more and more popular and tourism is gaining more importance. Tourism, as a dynamic economic sector, is generally considered to be the driving power of social and economical development of a region that able to strengthen the regional competitiveness on one hand and decrease the regional disparities on the other hand.

Nowadays for some regions of the Czech Republic is the economic importance of tourism getting crucial. However, majority of these regions are not equipped with sufficient tourism infrastructure, face lack of tourist attractions, and the quality level of services does not meet the standards that tourists are seeking for. Thus, to be able to attract tourists it is the first and foremost necessity to make desired changes and take actions towards development of tourism.

In order to maximize the benefits arising from development of tourism in the region it is essential to formulate a strategy what changes and actions needed to be done, and set forward the way how to manage them. Furthermore, tourism development will be beneficial only if it is managed in harmony with the regional environment and if it is socially acceptable.

Almost all regions of the Czech Republic have recently developed their own strategy for tourism development usually for the 5-year period. Based on the theory of strategic management, each strategy (not only in private sector but especially in public sector) needs be evaluated on a continuous basis rather than at the end of specified period in order to ensure that objectives defined in the strategy are being achieved.

The aim of this thesis is the evaluation of Strategy for tourism development in the Vysočina Region for the period 2008 – 2013. The evaluation will be made in the middle of specified period and thus it will consider only the first three years.

2. Objectives and Methodology

2.1 Objectives

As the introduction indicated, the main objective of this thesis is to evaluate the Strategy for tourism development in the Vysočina Region for the period 2008 – 2013 (Strategy). The evaluation will be made in the middle of specified period and thus it will consider only the first three years. **Firstly**, the Region of Vysočina will be introduced and the analysis of tourism in the Vysočina Region will be provided in terms of its tourism potential and infrastructure. **Secondly**, the strategic document outlining the Strategy will be presented, and selected arrangements defined in the Strategy will be measured by several indicators that will enable the strategy evaluation. **Thirdly**, the role of tourism in the economy of the Vysočina Region will be evaluated through its share on the Gross Value Added of the region. All results and findings of the evaluation will be discussed and possible adjustments of the Strategy will be suggested.

2.2 Methodology

The literature overview is based on the study and analysis of secondary data such as specialized literature and other relevant sources related to the topic of this thesis.

For the empirical part there were quantitative methodical tools used, such as comparative and contextual analysis of secondary data obtained from the Czech Statistical Office and from documents and other relevant sources publicly available about the Vysočina Region, Rural Development Programme, Regional Operational Programme, and Vysočina Fund.

In order to obtain the secondary data that were not publicly available, there were responsible departments of Rural Development Programme, Regional Operational Programme, and Vysočina Fund asked via email to provide the requested information.

Furthermore, a semi structured interview with Ing. Pavel Čihák, the director of Vysočina Tourism (an allowance organization responsible for destination management in the Vysočina Region), in order to discuss the results of evaluation, was held.

3. Literature overview

This chapter is dedicated to a literature research where important information about the topic of this thesis was acquired.

3.1 Strategy

The origin of the word strategy comes from the Antique Greece, where the expression strategos was composed of word stratos (army forces) and agein (to lead). There is no single unified definition, however, strategy can be generally explained as an identification of strategic goals and approaches, how to achieve these goals by means of various processes, methods and technologies.

Various scientists stated different definitions of strategy. For example Johnson and Scholes (1993) define strategy as “the direction and scope of an organization over the long-term: ideally, which matches its resources to its changing environment and in particular its markets, customers or clients so as to meet shareholder expectations.”

Richardson B. and Richardson R. (1992) generally define strategy to be “a means of achieving a desired end”.

David (2009) explains strategy to be “the means by which long-term objectives will be achieved. Strategies are potential actions that require top management decisions and large amounts of the firm’s resources. In addition, strategies affect an organization’s long-term prosperity, typically for at least five years, and thus are future oriented. Strategies have multifunctional and multidivisional consequences and require consideration of both the external and internal factors facing the firm.”

According to the Johnson and Scholes (1993), strategy should match the activities of an organization to the environment in which it operates and to its resource capability. In general, the main task of strategy is [4]:

- countering environmental threats
- taking advantage of environmental resources
- matching organizational resources to these threats and opportunities

Strategy in an organization is affected also by the values of those who have power in and around the organization and the decisions arising from the strategy affects its long-term direction and scope.

Souček and Marek (1998) introduced following ten principles of strategic thinking, where the desired characteristics of a strategy are clearly described [7]:

1. **Variability.** Strategy should be prepared in more scenarios because the environment and its factors include the element of risk. Therefore, the subject has to be able to switch to the other strategy scenario to overcome the “strategic surprise”.
2. **Permanence.** Strategy has to be continuously updated (compare the initial data with the reality and undertake necessary corrections when needed).
3. **Global system approach.** The global interdependence has to be involved in the strategy.
4. **Creative approach.** Innovations and inventions enable to gain comparative advantage.
5. **Multidisciplinary approach.** Strategy creation involves the utilization of various science branches.
6. **Risk.** It is important to consider the element of risk when making decisions and take necessary actions to minimize it.
7. **Resource concentration.** All kinds of various sources need to be involved in the strategy.
8. **Time.** All economic operations are proceeded in given time and space. The right timing might decide about the success or failure of given strategy.
9. **Aggregate approach.** The main focus should be on the substantial facts and not on the useless details.
10. **Feedback.** Tightly connected to the permanence. Feedback enables to amend the strategy to be up to date.

Strategy deals with several terms, which are explained below:

- **Vision statement**

Vision statement of an organization is often just a single statement answering the key question: What does the organization wants to become? It is sometimes considered to be the first step in the process of strategy formulation [1].

- **Mission statement**

Mission statement should express the major purpose of an organization, which should be in line with values and expectations of its stakeholders. According to David (2009), “a clear mission statement describes the value and priorities of an organization”. Basically, mission statement has to provide the answer the question: What business is the organization in [4]?

- **Goal**

Goal is a general statement of direction that is in line with the mission. It should be defined on a qualitative basis [4].

- **Objectives**

Objectives are more detailed statements being in line with the goal. Ideally, it should provide a quantification of a goal [4]. David (2009) defines objectives as “specific results that an organization seeks to achieve in pursuing its basic mission”. Also, David (2009) considers objectives to be crucial for the success of an organization, because they “state direction; aid in evaluation; create synergy; reveal priorities; focus coordination; and provide a basis for effective planning, organizing, motivating, and controlling activities”. Objectives have to be clear, reasonable and measurable.

- **Actions**

Johnson and Scholes (1993) broadly define actions to be “individual steps to implement strategies”.

- **Control/ Evaluation**

Control refers to the monitoring of actions resulting either in assessing the strategy effectiveness or strategy modifications (or only particular actions) when necessary [4].

- **SWOT Analysis**

In SWOT analysis, the data from the external analysis of the organization's environment and internal analysis of organization's resources and capabilities are summarized. The abbreviation SWOT stands for: Strengths, Weaknesses, Opportunities and Threats.

- **External opportunities and threats**

External opportunities and threats deal with the economic, cultural, social, environmental, demographic, legal, political, governmental, competitive, and technological trends and events affecting (either benefit or harm) an organization [1].

- **Internal strengths and weaknesses**

David (2009) explains internal strengths and weaknesses to be "organization's controllable activities that are performed especially well or poorly". An organization has to develop a strategy that will benefit from its strengths and eliminate weaknesses. Strengths and weaknesses should be determined in relation to objectives or competition rather than performance [1].

To summarize, effective strategy firstly requires the analysis of external opportunities and threats and internal strengths and weaknesses of an organization. Secondly, its vision statement, mission statement, goals, objectives need to be clearly defined. Thirdly, strategy should indicate actions that will enable the objective and goal achievement. As David (2009) points out "strategies need to translate into actions and tasks which link broad direction to specific operational issues and individuals". Last but not least, these actions need be monitored to be able to evaluate the strategy effectiveness and efficiency and adjust it when not working properly.

3.2 Strategic Management

Generally, strategic management can be defined as a process of strategic decision making. Strategic management is the process of formulation and realization of long-term plans, which are essential for the development of an organization. Appropriately selected strategic goals and ways how to achieve these goals under existing environment and conditions are the fundamentals of strategic management.

David (2009) defines strategic management as “the art and science of formulating, implementing, and evaluating cross-functional decisions that enable an organization to achieve its objectives.” An organization needs to have its strategy formulated to be able to benefit from both internal strengths and external opportunities and to reduce the impact of external threats and to eliminate internal weaknesses [1]. According to Johnson and Scholes (1993), the basic tenet of strategic management is to take decisions about key issues that organization faces and ensure that strategy is appropriately put into effect.

Strategic management usually consists of three basic stages. Various scientists explain these stages in a different way. Explanations of these stages according to David (2009) and Johnson and Scholes (1993) are given below.

The latter states, that strategic management is comprised of strategic analysis, strategic choice and strategy implementation [4]:

- **Strategic analysis** – this step has to be made to be able to understand the strategic position of the organization and to “form a view of the key influences on the present and future well-being of the organization and therefore on the choice of strategy” (Johnson and Scholes, 1993). Strategic analysis should take into account following aspects:
 - The environment
 - The resources of the organization
 - The expectations of different stakeholders
- **Strategic choice** – possible courses of actions are formulated, evaluated and the most suitable ones are selected. The process of strategic choice consists of following parts:
 - Generation of strategic options
 - Evaluation of strategic options (the search for strategy fit)
 - Selection of strategy
- **Strategy implementation** – the choice of strategy is put into effect by means of implementing the selected activities into practice and making corresponding changes. It involves, above all, following steps:
 - Allocating resources and planning their logistics
 - Setting up the organization structure and design

- Managing strategy change

In comparison, David (2009) identifies the stages of strategic management to be the strategy formulation, implementation, and evaluation [1]:

- **Strategy formulation** – includes development of a vision and mission, identification of organization's external opportunities and threats, determination of internal strengths and weaknesses, establishment of long-term objectives, generation of alternative strategies, and selection of particular strategies to pursue.
- **Strategy implementation** - requires the establishment of annual objectives, and also the allocation of resources so that formulated strategies can be executed. This stage (sometimes called the action stage of strategic management) includes developing a strategy-supportive culture, creating an effective organizational structure redirecting marketing efforts, preparing budgets, developing and utilizing information systems, and linking employee compensation to organizational performance.
- **Strategy evaluation** - is the final stage of strategic management. It is crucial to know when particular strategies are not working well; strategy evaluation is the primary for obtaining this information. All strategies are subject to future modification because internal and external forces are constantly changing. Three fundamental strategy evaluation activities are:
 - reviewing external and internal factors that are bases for current strategies
 - measuring performance
 - taking corrective actions

3.3 Strategy evaluation

Strategy evaluation is essential to ensure that stated objectives are being achieved. Furthermore, it is also vital for organization's wellbeing and is beneficial for all types and sizes of organization. It has to be performed on a continuing basis, rather than at the end of specified periods or just after the problems occur. During the strategy evaluation it has to be determined whether the chosen strategy is achieving the organization's objectives. Strategy could be further modified because internal and external factors are constantly changing. [1]

David (2009) further explains that there are 4 criteria used for strategy evaluation offered by scientist Richard Rumelt:

- **Consistency:** The strategy must not present mutually inconsistent goals and policies.
- **Consonance:** The strategy must represent an adaptive response to the external environment and to the critical changes occurring within it.
- **Advantage:** The strategy must provide for the creation and/or maintenance of a competitive advantage in the selected area of activity. Competitive advantages normally are the results of superiority in one of three areas: resources, skills, position.
- **Feasibility:** The strategy must neither overtax available resources nor create unsolvable sub problems.

Consonance and advantage are usually based on external analysis; consistency and feasibility on internal analysis. When assumptions and expectations differ significantly from forecasts, then strategy-formulation activities should be renewed.

On the other hand, Johnson and Scholes (1993) present a model where strategic options are evaluated according to 3 key success criteria [4]:

- **Suitability** (*would it work?*) - deals with overall logic of the strategy. This criterion is considering whether the strategy is economically rational and is suitable for environment and available capabilities.
- **Feasibility** (*can it be made to work?*) – is concerned with the availability of resources needed for strategy implementation. Resources such as people, time, funding and information can be obtained or developed.
- **Acceptability** (*will they work it?*) – is considering how would the stakeholders deal with the performance outcomes of organization

As it was already mentioned in previous chapter, strategy evaluation includes the examination of underlying strategy bases (review of internal and external factors), comparison of expected results with achieved results (measuring organizational performance), and taking corrective actions [1]:

- **Review of internal and external factors.** Many external and internal factors can be prohibitive in achieving the required goals and objectives. External factors include: actions by competitors, changes in demand and in technology, economic changes, demographic shifts and governmental actions. Internal factors include: selection of ineffective strategies, poor implementation activities, too optimistic stated objectives. It is necessary to continually monitor both internal strengths and weaknesses and external opportunities and threats. As David (2009) states, “it is not really a question of whether these factors will change but rather when they will change and in what ways.” Some key questions to address in evaluating strategies are:
 - Are our internal strengths/ weaknesses still strengths/ weaknesses?
 - Have we added other internal strengths/ weaknesses? If so, what are they?
 - Are there still the same external opportunities/ threats?
 - Are there now other external opportunities/ threats? If so, what are they?
- **Measuring organizational performance.** Comparing expected results to actual results, examining process being made to meet stated objectives. The following factors may obstruct meeting the objectives: ineffective strategies, unreasonable policies. Basically, problems can result from both ineffectiveness (*not doing the right things*) and inefficiency (*doing the right thing poorly*) of selected strategy. Criteria have to be measurable and easily verifiable. Strategy evaluation has to be based on both quantitative and qualitative criteria. Financial ratios (Return on Equity, Return on Investment, Debt to Equity, Earnings per Share, Profit Margin, Market Share, Sales Growth, Asset Growth) are part of quantitative criteria and are usually compared with industry averages and with competitors. Moreover, organization’s performance over different time periods is being evaluated through these financial ratios.
- **Taking corrective actions.** Corrective actions should take advantage of opportunities and strengths, reduce threats, and eliminate weaknesses. They need to have proper time horizon and appropriate amount of risk. Moreover, they have to be socially responsible and internally consistent. According to David (2009), corrective actions are almost always needed except when both external and internal

factors have not significantly changed or the organization is progressing satisfactorily toward achieving stated objectives.

David (2009) also mentions with six qualitative questions identified by scientist Seymour Tilles that are useful in evaluating strategies [1]:

1. Is the strategy internally consistent?
2. Is the strategy consistent with the environment?
3. Is the strategy appropriate in view of available resources?
4. Does the strategy involve and acceptable degree of risk?
5. Does the strategy have an appropriate time framework?
6. Is the strategy workable?

To sum up, during the strategy evaluation there should be following questions answered:

- Are the objectives of the organization appropriate?
- Are the major policies and plans appropriate?
- Do the results obtained to date confirm or refute critical assumptions on which the strategy rests?

3.4 Strategy in the public sector

Although the development of strategies occurs mostly in commercial enterprises, it is getting more and more important also in the public sector. Apparently, there exist differences especially in concepts and techniques to be used in the public sector. These differences need to be identified and furthermore, the focus of attention when considering the development of strategy in the public sector has to be clearly set [4].

As Johnson and Scholes (1993) further explain, there are similarities of the public sector to the commercial sector, i.e. there is “a labour market, money market of sorts, suppliers, users and customers”. As the major difference is that the public sector operates above all in the political market which approves budgets and provides subsidies. Consequently, “the strategic decisions may be heavily influenced by political considerations, and may mean that analyses of strategies require the norms of political dogma to be considered explicitly. Certain aspects of strategic analysis and choice, notably those to do with political influences, are more important”. [4]

In addition, public sector differs from the commercial sector by the nature of competition. In the public sector is the “competition for resource inputs” mainly identified and for that reason the “value for money in outputs” has to be clearly demonstrated. The role of ideology and acceptability for the stakeholders is considered to be more important in the public sector than in the commercial sector [4].

3.5 Strategy in tourism

This thesis is concerned with the evaluation of the strategy for regional development, there has to be mentioned the theory of formulation of strategy in tourism, especially of the strategic document as such.

All information in this chapter was drawn from Vystoupil et al. (2007) [25].

3.5.1 Formulation of strategic documents in tourism

Strategic documents belong to the basic instruments of management and are formulated during the planning phase. Visions (the aims of development) are identified during the planning phase, and the strategies enabling the achievement of these aims are defined. The fulfilment of visions and aims is carried out through the planned programmes [25].

Strategic document (strategy) enables to systematically organize and manage the changes in the given region. The document should describe the strengths and weaknesses of given region, determine the basic priorities (supports) of development, define the aims of support/ development and particular arrangements and suggestions that lead to the fulfilment of these aims [25].

Key terms in strategic documents [25]:

Development Priorities are understood as complex statements which define the general solutions for the improvement of current situation of the region. They are selected and sorted according to their significance.

The aims of development are statements that describe the ideal future situation.

The arrangements are activities leading to the execution of above mentioned priorities.

3.5.2 Legal frame of strategy in the public sector of the Czech Republic

According to the Legal Act 248/ 2000 Coll. about the Support for Regional Development the strategy is defined as a mid-term document for the period of 3 – 7 years, which formulates the approach of public authorities providing the necessary basis and appointing the development goals and principles/ policies for generation of regional development strategies [25].

The strategy (according to the Legal Act) should contain the following:

- Analysis of the state/ situation of regional development
- Characteristics of strengths and weaknesses
- Strategic development goals
- Determination of supported regions
- Suggestions focused on the development of particular economic sector

For the strategy formulation there are following data utilized:

- Statistical data
- Land planning documents of given region
- Land planning documentation of given region
- Limits for land utilization and principles of regional organization
- Principles of protection and creation of the environment
- Development programmes of given regions

3.5.3 Tourism and Local Agenda 21

Tourism and Local Agenda 21 is a document addressed to the local authorities and is focused on the adherence to the principles of sustainable development. It is a methodical (not legally obliged) paper which outlines an approach how to efficiently fulfil the strategy and the action plan of tourism development in given location with respect to the principles of sustainable development and specific local discrepancies.

The following three key aspects are considered to be crucial for the efficient implementation of tourism development strategy [25]:

- Establishment of effective structure enabling the mutual cooperation among all subjects concerned with tourism in the destination.

- Formulation of strategy of sustainable tourism, which would be in compliance with the viewpoints of all subjects concerned with tourism in the destination and which would enable to implement the management process of tourism among other managing functions in the destination.
- Setting and implementing activities which would be in compliance with strategy and would fulfil the economic, social, ecologic sustainability of tourism in the destination.

The methodology for strategy formulation according to the Local Agenda 21 and Tourism should be following [25]:

- Evaluation of social, economic and ecological conditions and needs and their relations to tourism
- Audit of natural, cultural, historical potentials and tourist infrastructure including the evaluation of strengths and weaknesses
- Analysis of potential markets
- Evaluation of both existing and potential threats and opportunities that arise from tourism, including the ecologic activities of subjects concerned with tourism
- Long-term vision of tourism in given destination
- Strategic goals
- Measurable indicators
- Action plan including the determination of financial resources and subjects responsible for fulfilment of the strategy
- Monitoring and control process

Moreover, it is required to involve not only the economic influence of tourism but also ecologic, social and cultural influences, which are often being underestimated. Strategy of tourism development should be the essential part of the planning process and management of development in given destination. Following instruments may contribute to this integration [25]:

- **Spatial planning** – is the key instrument for organization and control of regional development. Strategy for tourism development in a region needs to be consistent with regional spatial plans.

- **Concept of carrying capacity in the region** – defines how many tourists a destination can carry without harming its environment and negatively impacting the life of inhabitants. It is not about setting the maximum number of tourists that can stay in a destination in one time, but rather about setting the limits of acceptable changes to be made and defining the processes that will enable to sustain within these limits.
- **Environmental Management System** – is based on the individual activities and initiatives meeting the principles of sustainability and therefore protecting the environment or even improving it.
- **Integrated Duality Management** – means continual management process of setting the quality standards in tourism, monitoring feedbacks from tourists and handling actions for improvement where necessary.

3.6 Basic definitions and specifics in tourism

This chapter is dedicated to the basic definitions and characteristics of tourism.

3.6.1 Basic definitions in tourism

Although there exist many definitions of tourism, the official one was formulated during the International Conference for Statistics in Tourism held in Ottawa in 1991 and organized by United Nations World Tourism Organization (UNWTO): Tourism comprises the activities of persons travelling and staying in places outside their usual environment (outside their place of living) for the period shorter than is further stated (the period has to be shorter than 6 months in terms of domestic tourism and shorter than 1 year in terms of international tourism) for purposes other than earning money [5]. During the UNWTO conference in Ottawa there were also distinguished three main categories of tourism [2]:

1. **Internal tourism** – includes travelling of persons within their native country (domestic tourism) and travelling of foreigners to country not being their native (inbound tourism).
2. **National tourism** – represents the domestic tourism and travelling of persons outside their native country (outbound tourism).
3. **International tourism** – covers incoming and outgoing foreign (cross border) tourism.

Petrů (2007) mentions the following UNWTO classification of travelling persons [5]:

- **Visitor** is a person travelling to places outside their place of living for purposes other than earning money.
- **Tourist** is a temporary visitor staying in given place/ country at least for 24 hours including at least one overnight stay for leisure and other purposes.
- **Excursionist** or **same day visitor** is a person staying in given place/ country only one day and not staying overnight.

3.6.2 Specific characteristics of tourism

Foretová and Foret (2001) outline following features of tourism [2]:

1. Tourism development is determined by political and administrative conditions
2. Tourism product cannot be produced in advance and stocked
3. Local dependence, immediate continuity with the territory where is realized, especially with its environment
4. High seasonality
5. The market is strongly determined by natural factors and other unpredictable influences
6. Labour-intensive
7. Tight relation of supply and demand (changes in prices and incomes appear on the market immediately)

Tourism is, according to Foretová and Foret (2001), above all considered to be a special sphere of services and respective integrated products. Generally, services differ from the tangible products by their special characteristics, so-called 4I [2]:

- **Intangibility** – services have no shape, flavour, colour and packaging. Even though they are frequently connected with tangible elements (e.g. plane), the basic substance (transport) remains intangible.
- **Inconsistency** – realization and quality of a service are very subjective, depending on the concrete people and their current situation.
- **Inseparability** - services are tight to the destination, time, and person, who are providing them.
- **Inventory** – services cannot be stored, postponed (e.g. plane departure).

The customer cannot own the service, he can only use its advantage (e.g. he will travel on holiday by plane, but will not become the owner of this plane).

Following points characterize tourism services [2]:

- Impermanent and volatile effect of the product on customer.
- High rate of emotional, irrational factors affect the choice of type of holiday and place of stay with increasing requirements on the uniqueness and power of experience.
- Big importance of external aspects (e.g. luxury equipment, behaviour of staff), which are determining factors for perception of quality of service.
- The importance of service providers (tourist agencies, accommodation and catering establishments, transport operators) and their cooperation.
- Overriding role of image of given destination.
- Easy imitation of best practices among competitors resulting in the continual innovation and improvement of services.

3.7 Role of tourism in regional development

Tourism, according to Vystoupil et al (2007), is considered to be the driving power of regional development. Tourism is able to increase the competitiveness of the region and to eliminate the regional disparities. Moreover, if the rules of sustainability are followed, it can secure the sustainable development of a given region. However, it is necessary to be aware of the fact that tourism has these abilities only under specific conditions. One of the most important prerequisite is the effective management of the destination which could be explained as the systematic process focused on the achievement of defined aims. For achieving these aims is crucial to fulfil the particular phases of the management process such as planning, operational management and control [25].

Foretová and Foret (2001) see the importance of tourism in regions with regards to the economic contribution and also contribution in terms of communication improvements [2]:

- **Economic contribution of tourism**
 - Direct (financial) sources from spending money of foreign tourists
 - Direct (financial) sources from spending money of domestic tourists

- Indirect (non-financial) sources – tourism create job opportunities, and thus wages that arise from new work places consequently result in further consumption and investments
- Tourism generates incomes from the goods and services sold for both natural persons and corporate bodies and enables to invest, purchase new information technologies, carry out repairs, equipment maintenance etc.
- **Contribution of tourism in terms of communication improvements**
 - Secondary product of promotion is creating the image of a region. Well managed image is beneficial not only for development of tourism in the region but also to other economic activities.
 - Tourism helps to attract potential investors through local historical monuments, cultural events and other regional cultural values, which may be significant instruments for regional economic development.
 - Moreover, tourism helps to attract potential customers or co-operators of local subjects (not only enterprises but also e.g. universities), contributes to the enforcement and implementation of development projects and activities.
 - Last but not least, tourism generates revenues through taxes and charges to the municipality budgets, and thus in contributes to the municipality development.

A region should represent itself in the field of tourism consistently and therefore, from this point of view, tourism may have also unifying function, i.e. encouraging the partnership among involved subjects [2].

Tourism brings new job opportunities and incomes arising from money-spending visitors. At the same, increasing employment has effects on incomes and on development of the region [9]. All mentioned is called the multiplier effect of tourism. Furthermore, Vavrečka (2007) includes to the multiplier effect of tourism the following:

- Share in Gross Domestic Product (GDP)
- Positive impact on balance of payment (of a state)
- Increasing incomes to the regional budgets and also budgets of individual municipalities
- Development that supports investments and attracts new investors to region
- Development that affects local community (in both positive or negative ways)

3.8 Measuring the role of tourism in the economy of a region

The economic role of tourism in the economy of the Czech Republic is the most clearly shown in the Tourism Satellite Account (TSA)¹ of the Czech Republic. Unfortunately, TSA is nowadays created only national and not on regional level, and the share of tourism in GDP of particular regions of the Czech Republic is not monitored neither by the Czech Statistical Office nor by regional authorities. Therefore, for evaluating the share of tourism in the economic activity of a region can be another economic indicator of Gross Value Added (GVA) used. This indicator is measured within the statistical system of Regional Accounts of the Czech Republic.

3.8.1 Regional Accounts

Regional Accounts are a regional parallel of national accounts and make use of their concept according to the methodology of the European System of Accounts (ESA), a system of national and regional accounts used by the EU members most recently updated in 1995 (ESA 95). Regional accounts, according to Eurostat² (1995), are essential for the formulation, implementation and evaluation of regional policies and are used “for assessing regional disparities and for the eligibility of regions to the different objectives” and explains that “with increased expenditure on the structural funds, there comes a greater need for consistent and reliable regional statistics than ever before and in particular for regional economic accounts” [20].

In the Czech Republic, the Czech Statistical Office is responsible for Regional Accounts data collection. The accounts contain following main economic indicators:

- Gross Value Added
- Regional Gross Domestic Product
- Gross Fixed Capital Formation

¹ According to the UNWTO, TSA is a statistical instrument designed to provide credible data on the impact of tourism on a nation’s balance of payment and set a standard framework for organizing statistical data on tourism.

² The abbreviation stands for the Statistical Office of the European Union, which task is to provide the European statistics at European level to enable comparisons between countries and regions.

- Disposable Income of Households
- Estimation of total employment according ESA 95
- Estimation of employees according ESA 95
- Unemployment Rate

For purposes of the evaluation of role of tourism in the economy of a region there is only the indicator Gross Value Added relevant.

3.8.2 Gross Value Added

In general, GVA measures the contribution to the economy of each individual industry or sector and is an important measure in the estimation of Gross Domestic Product (a key indicator of the whole economy in a country).

Eurostat (1995) defines the regional Gross Value Added (GVA) to be “a measure of the economic activity of producer units resident in a region, it does not measure the income of resident households” [14]. GVA, according to Eurostat, (1995) is estimated as “the value of all newly generated goods and services less the value of all goods and services consumed as intermediate consumption. The depreciation of fixed assets is not taken into account. Gross value added is compiled according to the industry that created it” [20].

Within the statistical system of Regional Accounts, GVA is further divided according to the economic activities as follow:

- Agriculture, hunting and forestry
- Fishing
- Mining and quarrying
- Manufacturing
- Electricity, gas and water supply
- Construction
- Trade; repair of motor vehicles, motorcycles and personal and household goods
- **Hotels and restaurants**
- Transport, storage and communication
- Financial intermediation and instance
- Real estate, renting and business activities

- Public administration and defence, compulsory social security
- Education
- Health and social work
- Other community, social and personal service activities
- Private households with employed persons
- Extra-territorial organizations and bodies

Tourism is represented as the economic sector so-called Hotels and Restaurants. It is obvious that this sector definitely does not cover all tourism activities; nevertheless, it is the only economic measure of tourism on regional level currently available.

3.9 Tourism development in a region

According to Trinerová (2008), development of tourism in a region depends more or less on the overall potential of a region. Potential can be either natural or created by human being and is usually deployed unevenly throughout the region. The aim of every region should be the presentation of its potential in the most attractive way, and furthermore, an adoption of strategy that will secure sustainable development of tourism, attract more potential tourists and increase the well-being of local residents [8].

Trinerová (2008) mentioned key factors, determining tourist potential in a region, to be the following [8]:

- Region attractiveness – natural and cultural potential of the region
- Availability and accessibility of services – overall infrastructure of the region (transport, medical and banking services)
- Amenities – accommodation, catering, cultural, sports facilities
- Tourist packages
- Scale of tourist activities

Trinerová (2008) further divides tourism development in a region into following areas [8]:

- **Primary development** – based on creation of new tourist attractions. Due to high costs it is usually funded from private resources (often very limited) or from EU structural funds.

- **Secondary development** – based on utilization of existing resources (tourist attractions, property or real estate) that have not been utilized in terms of tourism before or have not been utilized at all.
- **Tertiary development** – combines the outcomes from primary and secondary development areas mentioned above and creates tourist packages (= combination of at least two mutually linked services offered to tourists for one price)
- **Supporting facilities** – services and equipment that are prerequisite for utilization of tourist attractions. Their low quality or absence significantly decreases the interest of tourists to visit the attractions in the region. These facilities include accommodation, catering services, information services, rentals etc)
- **Marketing** – helps to promote the outcomes of all four development areas stated above. The main instruments are publicity and advertising, sales promotion, public relations, programming, distribution and price policy.

Management of tourism development needs to be coordinated. Recently, the popular term for such management has been called a *destination management*. Holešinská (2007) defines the destination management as a specific form of management based on the so-called 3C principle. 3C principle means following principles of destination management [3]:

- **Cooperation** among particular subjects involved in tourism
- **Coordination** in planning, organizing and decision taking activities in the destination
- **Communication** on mutual basis is considered to be a key element of the successful implementation of the destination management

3. 9.1 Instruments for regional development

Before outlining the specific instruments for tourism development in a region there has to be mentioned the description of instruments and subjects involved in the development of a region in general.

Instruments for regional development are a complex of all tools, which helps to achieve the development goals in given region. Wokoun and Mates (2006) divide these instruments into 2 main groups [12]:

- **Financial instruments**
 - Investment and non-investment incentives (subsidies, grants, loans, guarantees)
 - Capital investments
 - Tax allowances (tax holiday, tax exemptions)
 - Budget allowances (subsidies)

- **Non-financial (regulative) instruments**
 - Administrative instruments (especially legislation)
 - Institutional instruments (institutions, strategic planning, development management)
 - Others non-financial instruments (consulting, promotion)

Regional development is complex of activities of various subjects operated on not only regional level, but also on the local and national levels [15]. That means that the division of instruments mentioned above have to be accurate and sufficient. Therefore, the team from GaREP Company, which deals with regional economic consulting, suggests extending the division as follows [15]:

- Administrative instruments (legislation, procedures, and policies)
- Conceptual instruments (strategies, programmes, plans, political declarations, land planning documents etc)
- Institutional instruments (institutions, cooperation, regional management)
- Material instruments (infrastructure, consulting, services)
- Social – psychological instruments (education, communication, motivation)
- Financial instruments (systems of financial supports, subsidies, grants)

For management of regional development and securing the functions of particular development instruments the following elements are essential [15]:

- Division of competences among various levels and subjects of public administration

- Clarification of rights and responsibilities of involved subjects
- Setting up the processes, applications and effects of chosen instruments

3.9.2 Subjects involved in regional development

Flexible system of subjects involved in regional development is fundamental for effective development of regions as such and also for efficient dealing with regional disparities [13]. Subjects involved in regional development according to their level of influence are listed below [13]:

- **Local level**
 - Municipality
 - Organizations established by municipality (schools, cultural and sport establishments...)
 - Entrepreneurs willing to participate in the regional development
- **Micro-regional level**
 - Union of municipalities
 - Municipalities
 - Local action/ operational groups
- **Regional level**
 - Region
 - Union of municipalities
 - Regional authorities
 - Associations of entrepreneurs
 - Non-profit organizations
 - Universities
- **National level**
 - The Ministry for Regional Development
 - Other ministries (of Agriculture etc)
 - Regions
 - Associations of municipalities (towns, villages...)
 - Associations of professionals (Industry Chamber of the Czech Republic, Agrarian Chamber of the Czech Republic)

Generally, subjects of regional development can be further divided according to their relationship to the projects or problems solved as follows [13]:

- Shareholders – subjects involved in the regional development
- Stakeholders – subjects affected by the activities arising from regional development
- Placeholders – subjects located in area where activities are implemented

The typical forms of support of regional development of these subjects are [13]:

- Direct support - utilization of resources of given subject (human, financial, material)
- Coordination – proactive approach to the coordination of activities of subjects involved
- Initiatives – stimulations of activities of involved subjects (including direct support)

3.10 Selected instruments for tourism development in the Vysočina Region

3.10.1 Rural Development Programme 2007 – 2013

Rural Development Programme (RDP) was designed for the specification of the measures for meeting the objectives defined in the basic strategic document called National Strategic Rural Development Plan of the Czech Republic for the period of 2007 – 2013, which was prepared with the purpose of drawing down the financial resources from the European Agricultural Fund for Rural Development (EAFRD)³.

The programme consists of 4 parts so-called Axes (groups of measures). Objectives of these Axes are listed below [18]:

- **Axis I:** Improving the competitiveness of the agricultural, food and forestry sectors
- **Axis II:** Increasing biodiversity, water and soil protection and mitigating climate change
- **Axis III:** Improving the quality of life in rural areas and encouraging the diversification of economic activities in these areas

³ EAFRD is the financial instrument of the second pillar of the system of EU agricultural subsidies and programmes concerned with rural development policy. (The first pillar is concerned with market policy and secured by the European Agricultural Fund for Guarantee (EAFG))

- **Axis IV:** Helping the residents of rural micro-regions to work out their local development strategy and supporting the projects concerning development of the region they live in.

For the whole programme was allocated EUR 2.8 billion from the EAFRD and with the finances from the state budget the total amounts to approx. EUR 3.6 billion. RDP deals with the development of tourism in rural areas in its third part Axis III, concretely measure III.1.3.

Axis III

The objective is to improve the quality of life and diversification of rural economy and is further divided into 3 priorities [18]:

- Creation of employment opportunities and support of use of renewable resources
- Conditions for growth and quality of life in rural areas
- Education

III.1.3 Encouragement of tourism activities

This measure is focused on diversification of rural economy through the development of tourism with the use of natural and cultural heritage in given area. It is further divided into 2 parts:

- a) Development and marking of hiking trails, wine paths, rest sites, horse riding paths
- b) Building of recreational infrastructure, recreational facilities and services [18]

Projects requesting support have to be realized in the municipalities with maximum 2000 inhabitants. The support is intended for both natural persons and corporate bodies. The minimum expenditures on a project is 50 000 CZK.

According to the decision of the Committee N 510/2006 effective as of October 24, 2006 is the maximum amount of support from RDP for the Vysočina Region determined as follows:

- 60 % for small enterprises
- 50 % for medium enterprises
- 40 % for large enterprises

Financial contribution would be 75 % from the EU funds and 25% from the public resources of the Czech Republic [18].

3.10.2 Regional Operational Programmes 2007 – 2013

Regional Operational Programmes for the period of 2007 – 2013 are intended for the whole territory of the Czech Republic except for the Capital City of Prague and are co-financed from the European Regional Development Fund (ERDF), one of the EU Structural Funds that are intended for the poorer or other disadvantaged regions of EU members, within the Convergence objective⁴, which is financed from the ERDF, European Social Fund and Cohesion Fund and covers all regions except for the Capital City of Prague [16].

These programmes cover several thematic areas with the objective of increasing the competitiveness of regions, speeding up their development and increasing the attractiveness of the regions for investors.

Totally, there were prepared 7 of these programmes according to the NUTS⁵ II classification:

- ROP NUTS II North-West
- ROP NUTS II North-East
- ROP NUTS II Central Bohemia
- ROP NUTS II South-West
- ROP NUTS II South-East
- ROP NUTS II Moravia-Silesia
- ROP NUTS II Central Moravia

Vysočina Region belongs together with South Moravia Region to the NUTS II South-East.

⁴ The objective of Convergence: support of economic and social development of regions at the level of NUTS II with Gross Domestic Product per citizen being lower than 75 % of this indicator average for the whole of the European Union. In addition, those states are qualified to draw finances from this objective that have a Gross National Income per citizen lower than 90 % of this indicator average for the whole of the European Union.

⁵ Nomenclature of Territorial Units for Statistics – a geo-code standard for referencing the subdivisions of countries for statistical purposes, developed and regulated by the European Union. For each EU member country, a hierarchy of three NUTS levels is established by Eurostat, where NUTS I is territory with 1 – 3 million inhabitants, NUTS II with 800 thousands – 3 million inhabitants and NUTS III with 150 – 800 thousands inhabitants.

ROP NUTS II South-East 2007 - 2013

The Regional Operational Programme NUTS II South-East (ROP SE) is intended for the cohesion region South-East consisting of the Regions of South Moravia and Vysočina. The programme is focused on improvement of transport accessibility and on interconnection of the region, including the modernization of the means of public transport, support of infrastructure as well as tourist trade service development, preparation of smaller business premises and improvement of living conditions in municipalities and in the countryside by improving the quality of education, social and health infrastructure. [16]

The managing body is the Regional Council of the South-East Cohesion Region. The amount of EUR 704.45 million (approx. 2.64 % of all finances intended for the Czech Republic from the EU funds). In addition, the programme financing should be increased by EUR 124.31 million from the Czech public sources. [16]

The programme is divided into 4 priority axes consisting of number of areas of support which define the types of projects that can be supported within the respective priority axes. Priority axes are listed below [16]:

- **Axis 1:** Transport accessibility
- **Axis 2:** Development of sustainable tourism
- **Axis 3:** Sustainable Development of Towns and Rural Settlements
- **Axis 4:** Technical assistance

Axis 2: Development of sustainable tourism

For this priority axis there has been reserved the amount of EUR 157 464 317, of which EUR 133.8 million is allocated from the EU funds (approx. 19 % of the total ROP SE allocation) and the rest from the Czech public funds [16].

The area of support may include following activities [16]:

- Modernisation of accommodation facilities
- Construction or modernisation of congress and conferences centres, spa-resort infrastructure, sport-recreation facilities
- Reconstruction and renewal of cultural monuments with their use for tourism
- Marking, repairs and adjustments of cycling tracks, tracks for pedestrians, skiers and horse-riders, nature trails

- Reconstruction or development of access roads including the related parking places and pavements
- Creation of marketing tourism strategies
- Development of tourism information systems and places with publicly available internet
- Marketing and information campaigns focused on promotion of the region

Beneficiaries of support may be municipalities, unions of municipalities and their organisations, regional authorities and legal entities with the participation of self-government representatives and small and medium-sized entrepreneurs.

Axis 2 is further divided into two specific support areas:

2.1: Development of infrastructure for tourism

2.2: Development of services in tourism

3.10.3 Vysočina Fund

Vysočina Fund is one of the instruments for the development of Vysočina Region which concentrates a part of the financial resources from the regional budget intended for the regional development. These financial resources in form of subsidies or loans are provided to particular subjects through grant programmes, which have to be in compliance with the priorities defined in the Strategy for Tourism Development in the Vysočina Region for the period 2008 - 2013.

4. Characteristics of the Vysočina Region

The data in this chapter were gathered from the Statistical Yearbook of the Vysočina Region 2010 [21].

The region is situated in the centre of the Czech Republic in geomorphologic subsystem of Czech-Moravian Highlands and borders with the regions of South Bohemia, Central Bohemia, Pardubice and South Moravia. The Vysočina Region is the 5th largest region of the Czech Republic. Its area of almost 6 800 sq km is one of the most homogenous landscape types in comparison to the other regions of the Czech Republic but is internally differentiated in terms of the attractiveness and tourism potential. The Region differs from the neighbouring regions by its dissected territory, higher altitude and low residential density and is attractive for its healthy forests, clean water resources and low air pollution. The highest point of the Region is Peak Javořice in the Javořice Highland, 837 above sea level. There are two protected landscape areas in the Region: the Žďár Hills (Žďárské Vrchy) and the Iron Mountains (Železné hory).

The Vysočina Region comprises of 5 districts (Havlíčkův Brod, Jihlava, Pelhřimov, Třebíč and Žďár nad Sázavou), 15 administrative districts of municipalities with extended powers, 26 administrative districts of municipalities with authorized municipal office and 704 municipalities (of which 34 municipalities have the status of town). The average population per municipality is 731 inhabitants, being the lowest of all the regions of the Czech Republic. As of January 1, 2010 the population in the Region was almost 515 thousands which represent the 3rd lowest population density among the regions of the Czech Republic.

There were almost 101 thousand businesses registered in the Business Register of the Region Vysočina at the end of 2009, which is the second lowest number of businesses comparing with the other regions of the Czech Republic (after the Karlovy Vary Region). The biggest number of businesses is in the Žďár nad Sázavou District (more than 23 thousand) and the lowest one in the Pelhřimov District (more than 15 thousand). Economic performance of the Region is below the average in comparison with the other regions of the Czech Republic. Share of the Region at Gross Domestic product of the Czech Republic was about 4% during the last years.

The average monthly gross wage in the Vysočina Region was about 20 300 CZK. The highest wages were paid in the branch of financial services, while the lowest wages were paid in hotels and restaurants. The regional unemployment rate was more than 10%, which is the 7th lowest rate among the other regions of the Czech Republic. The highest rate was identified in the Třebíč District (13%) and the lowest rate in the Pelhřimov District (7,5%).

The Vysočina Region has a long tradition of agriculture production. Despite the fact that the natural conditions are not so favourable due to the high altitude and slope relief of the territory, for some agricultural commodities (such as oil plants or potatoes) are the natural conditions optimal. The regional agriculture production passed through a difficult transformation period after 1989 and nowadays is still focused on large-scale farming. The majority of agricultural enterprises are concerned with the combination of both crop production and animal production.

The most significant industrial output in the region includes manufacturing, (namely food and textile processing industry), engineering and metalworking. Industrial centres were formed around the district towns and towns with good transport accessibility.

Network of roads and railways in the Vysočina Region is considered to be strategic for national and even European transport. The territory is a part of Central-European urbanized axis (Berlin-Prague-Vienna/Bratislava-Budapest). The region is situated on a half way between the Capital City Prague and the City of Brno and is easily accessible via D1 highway (called E 50 and E 65 in the network of European roads) from both cities.

Education in the region is secured by a stable network of basic and secondary schools and two universities (Polytechnic University in Jihlava and West-Moravian University) are settled there.

The Region hosts annually several interesting cultural events even of international character, for example:

- The International Meeting of Choruses accompanied by the International Competition of Mixed-voice Choruses held in Jihlava
- The International Documentary Festival in Jihlava
- The European Meeting of Folklore Ensembles in Telč

Three historical monuments and buildings that are listed in the UNESCO World Cultural Heritage List are to be found in the Vysočina Region:

- Urban Conservation Area of Telč
- Church of St. John of Nepomuk by the architect Giovanni Santini situated on a hill Zelená Hora near the town Žďár nad Sázavou
- St. Procopius Basilica with a cemetery and former Jewish ghetto in Třebíč

To summarize the basic characteristic of the Vysočina Region there should be pointed out following:

- The Vysočina Region is attractive for its beautiful nature and healthy environment. Moreover, regional statistics proclaim a relatively low crime rate.
- The disintegrated residential structure and low offer for labour force (especially qualified) cause that some people (mainly young and qualified inhabitants) move away from small municipalities to bigger towns, even outside the Region.
- A low number of businesses in the Region indicated that there are not many business activities and opportunities, which might be also a reason for outflow of young and qualified inhabitants.
- Economic performance is under the average in comparison with other regions of the Czech Republic.
- The convenient strategic location of the Region attracts the foreign investors who deploy the production plants, development and research units there.
- Although the number of schools in the Region is adequate, their insufficient technical equipment and ensuring of commutation of children from small municipalities are considered to be the subjects for necessary improvement.

Further characteristics and analysis of the Vysočina Region will be focused solely on tourism as a topic of this thesis.

5. Evaluation of Strategy for tourism development in the Vysočina Region for the period 2008 - 2013

5.1 Analysis of tourism in the Vysočina Region

The major advantages of potential of the Vysočina Region for tourism are considered to be the following:

- Geographical location of the region (transit position within the Czech Republic, accessible location for cross-border visitors)
- Very good natural conditions and environment (one of the best in the Czech Republic)
- Various tourist attractions even with international importance (listed in UNESCO World Heritage List)
- Many well-marked tourist trails and cycling trails

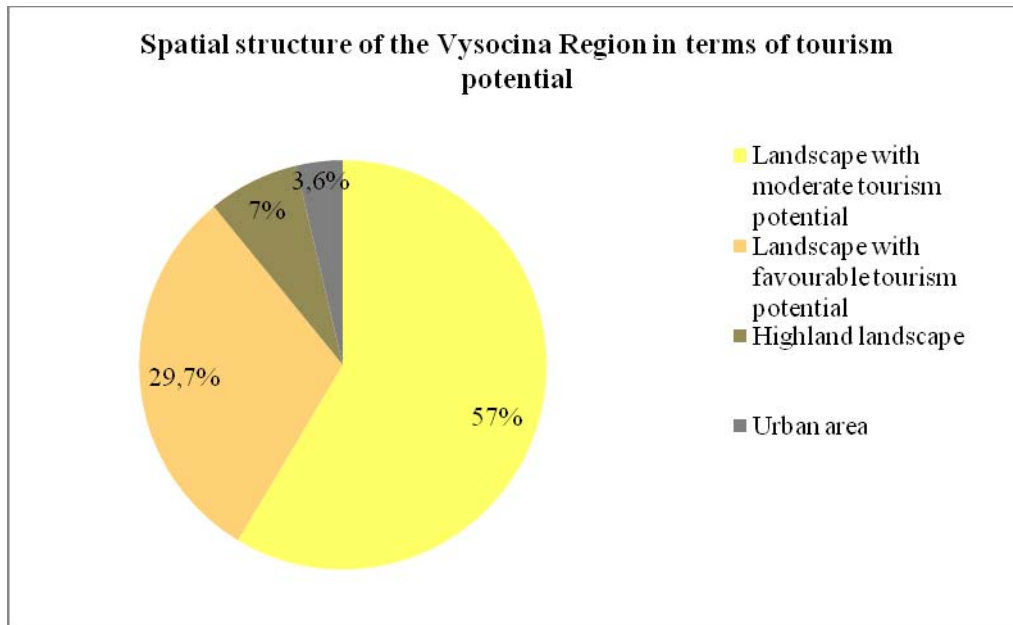
In this chapter, the Region will be analyzed in terms of tourism potential from following perspectives:

- Geographical potential for tourism
- Potential recreational areas
- Natural attractions
- Tourist attractions

5.1.1 Geographical potential

For evaluating the tourism potential of the Region in terms of geographical conditions Vystoupil et al. (2006) defined the so-called Tourism Zones based on the synthesis of geographical and spatial planning approach, namely on classification of areas with regards to their functionality and suitability for tourism. The areas were classified as follows: highland landscape, landscape with minimum tourism potential, landscape with moderate tourism potential, landscape with favourable tourism potential, landscape with large rock formation, and urban areas. From this perspective Vystoupil et al. (2006) identified the spatial structure in terms of tourism potential for all regions of the Czech Republic and the information about the Vysočina Region were processed into the Figure 1 below.

Figure 1: Spatial structure of the Vysocina Region in terms of tourism potential



Source: Vystoupil et al (2006), processed by author

From the figure it is obvious that more than three quarters of territory of the Vysočina Region are suitable for utilization in tourism and about 30% of the territory is classified as landscape with favourable tourism potential. This relatively favourable structure ranks the Vysočina Region on the 5th position among the regions of the Czech Republic (after the regions of Liberec, South-Bohemia Region, Karlovy Vary and Zlin). [11]

5.1.2 Potential recreational areas

Natural conditions fundamentally determine tourism potential of given territory and are considered to be the main decisive factor for selection of tourism activities and types of recreations that would take place in the territory.

The indicator Potential Recreational Areas (PRA), according to Vystoupil et al. (2006), expresses the influence of the overall natural conditions on the intensity of utilization of given territory and gives a complex overview on the natural potential of this territory and its utilization for recreational purposes. The indicator is calculated as a sum of the areas suitable for utilization in tourism located in a particular municipality and this number is then divided by the total area of this municipality and expressed as a percentage

rate. Data for these calculations are available in the Land Registry of the Czech Republic. Within the area of the whole Czech Republic, the indicator varies between 0,8 – 98,6%.[11]

Vystoupil et al. (2006) identified the areas least suitable for tourism in the parts of the region which are intensively utilized in agriculture (where the PRA rate was not higher than 25%), while the areas the most favourable for tourism are located nearby forests, pastures, orchards and lakes or rivers (where the PRA rate was more than 65%). [11]

There are to be found 3 larger territories concentrating top rated Potential Recreational Areas in the Region [11]:

- The territory of Žďárské Vrchy and Železná Hory (both protected landscape areas)
- The territory of Svratecká Vrchovina (Svratka Highlands)
- The territory of Javořice Highlands around Telč

5.1.3 Natural attractions

Natural attractiveness of any area is always determined by the geomorphologic hydrologic, climatic and bio geographic conditions.

Beside the two protected landscape areas already mentioned above belonging among the large-scale protected areas, there are about many small-scale protected areas, concretely 76 natural reservations and 94 natural monuments situated in the Vysočina Region. In addition, there can be about 7 national parks found that are, however, not under the official protection.

5.1.4 Tourist attractions

Wonderful nature and healthy environment of the Vysočina Region can be explored either by foot, by bike or even or on a horse back. The Region offers about 2 800 km of well-marked paths for pedestrians, about 2 300 km of cycling trails and more than 850 km of horse riding paths. Moreover, there are to be found 52 educational paths dedicated mainly to the nature protection and to the cultural heritage of the Region. There are 5 rope parks present, enabling the entertainment for both children and adults. [10]

During the winter, the Region is a popular resort for cross country skiing. Unfortunately, due to not too high altitude of the trails for cross country skiing there is a very tight dependence on the overall climatic and snow conditions. Therefore, the Vysočina Region cannot compete the regions situated on the north of the Czech Republic with mountainous landscape and thus with much more favourable climatic and snow conditions. There are to be found about 30 ski slopes, majority of them is situated around Žďárské Vrchy, and in case of substandard snow conditions they are equipped with snow cannons producing artificial snow.

As was already mentioned in the Chapter 4 concerning the basic facts about the Region, to the most famous historical monuments belong the ones listed on the UNESCO World Heritage List, i.e. Urban Conservation Area of Telč, Church of St. John of Nepomuk by the architect Giovanni Santini situated on a hill called Zelená Hora near the town Žďár nad Sázavou, and last but not least St. Procopius Basilica with a cemetery and former Jewish ghetto in Třebíč.

Nowadays, when the interest in regional beers from small breweries is getting more and more popular, there definitely should not be omitted several breweries located in the Region which are opened to tourists. There are to be found 6 breweries producing local beers with very long tradition (around the towns of Dalešice, Velké Meziříčí, Jihlava, Havlíčkův Brod, Humpolec, Želiv, Pelhřimov), then 2 micro breweries in the villages of Horní Dubenky and Pacov) and finally one brand new brewery situated in the town of Želiv.

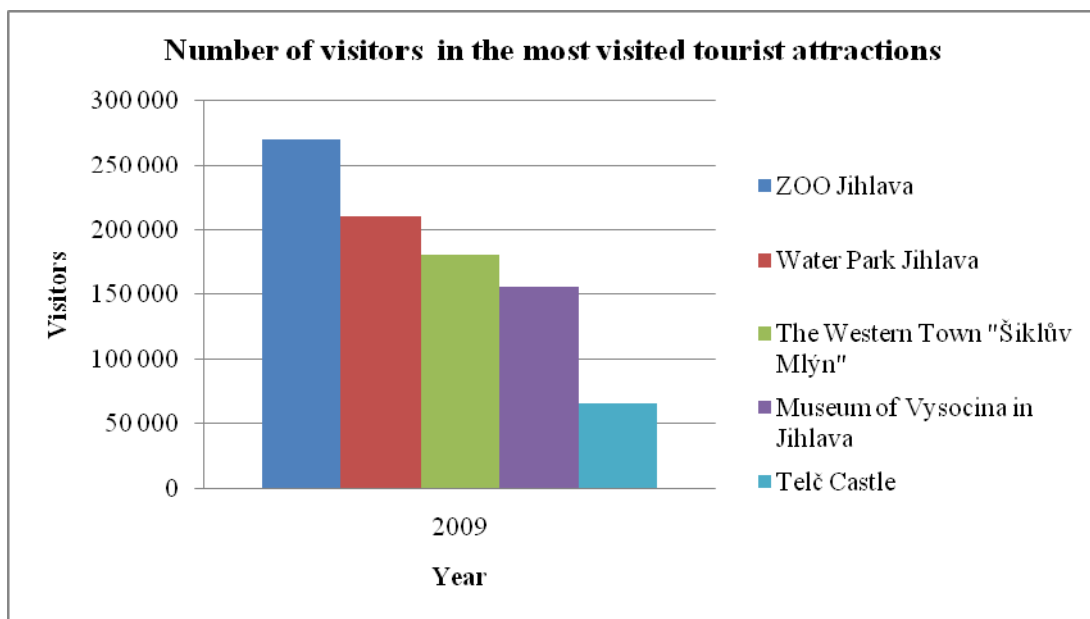
There has to be mentioned that the offer reflecting the actual trends in tourism is still very limited in the Region. As among these the new types of tourism, that are visitors nowadays seeking for, belong also wellness tourism and golf tourism. In the Vysočina Region, there can be found only one establishment focused on wellness tourism Resort Svatá Kateřina, located near Počátky. There are two golf courses situated in the Region 9-hole Golf Club Svratka, 18-hole Golf Resort Telč both with long tradition and rich history.

For tourist and visitors there are about 34 tourist information centres available throughout the region.

According to the document called Instructions for tourist guides (*Manuál pro průvodce v cestovním ruchu*) made up by the Vysočina Tourism (an allowance organization running under and financed by the Regional Authority of the Vysočina

Region) and presented within the *Workshop for Professionals in Tourism* (held in February 2011 and organized by the Czech Tourism), which the author of this thesis attended (the certificate is attached to this thesis as Appendix 4), among the most visited tourist attractions in the Vysočina Region belongs ZOO Jihlava, Western Town “Šiklův Mlýn”, Museum of Vysočina in Jihlava, and Telč Castle. The number of visitors in 2009 is shown in the Figure 2 below [10]:

Figure 2: Number of visitors in the most visited tourist attractions



Source: Manuál pro průvodce v cestovním ruchu, 2011, processed by author

The most remarkable is the visit rate of ZOO Jihlava (270 000 visitors), which was even higher than that the visit rate of Karlštejn Castle, which was according the Czech Tourism reported to be 254 000 of visitors in 2009.

5.1.5 Destination Management

Tourism in the Vysočina Region is managed by the allowance organization Vysočina Tourism. This organization is settled in Jihlava and runs its activities as of February 2, 2008 and is financed by by the Regional Authority of the Vysočina Region with the aim of strengthening the competitiveness of the Vysočina Region in terms of tourism. The main task of this organization is to coordinate sustainable tourism development on a long-term basis. Vysočina Tourism is concerned with the following activities [24]:

- Management and organization of various analyses

- Coordination of cooperation among subjects involved in tourism from both private and public sectors
- Promotion and presentation of the Vysočina Region in Czech and international markets
- Collection of information about tourism potential of the Vysočina Region
- Coordination of activities of tourist centres
- Management of regional tourist products
- Consulting services for subjects involved in tourism
- Cooperation with tourism organizations (e.g. Czech Tourism) and professional organizations

The staff of Vysočina Tourism nowadays comprises of three employees.

5.2 Strategic document for tourism development in the Vysočina Region

The strategic document defining the Strategy for Tourism Development in the Vysočina Region for the period 2008 – 2013 (Strategy) was issued in May 2008 and was made up by the Strategic Planning Department of the Vysočina Regional Office, the allowance organization Vysočina Tourism, and the Faculty of Economic and Management of the Masaryk University in Brno.

The paper is divided into four following parts [22]:

- **Introduction**

The tourism potential of Vysočina Region is briefly introduced and the processing methodology is described.

- **SWOT Analysis**

This chapter is logically structured into 5 SWOT Analyses that are based on the particular potentials and conditions for tourism in the Vysočina Region:

- Natural potential
- Attractiveness of the region, tourist infrastructure
- Tourist Services, products and activities
- Organization, marketing, communication and informational services in tourism
- Human resources, financing

These SWOT analyses in full text are attached to the thesis as Appendix 1.

- **Strategic framework of the Strategy**

Based on the identified problems limiting the tourism development in the Region and with taking into consideration the importance of tourism not only for the economy of the Region but for the Czech Republic as a whole, there were vision and goals defined and the fundamental priorities determined.

Strategic visions:

- *The Vysočina Region is easily accessible destination for discovering the Czech history and nature, for various activities of spending leisure time (relaxation, sports), and for professional meetings and conferences.*
- *The quality of infrastructure and hospitality services, diversity of tourist products, natural conditions and cultural conditions are the reasons for the repeated visits of the Vysočina Region.*
- *Broadly supported, dynamic and sustainable tourism is significant part of being of the Vysočina Region.*

Global goal is to increase the competitiveness and economic performance of tourism with respect to the environmental protection.

Strategic goal is to utilize the location of the Vysočina Region in the centre of the Czech Republic and further develop its natural and cultural potential for tourism of selected target groups conditioned by the long-term sustainability

Specific goals are the following:

- Sustainable utilization of natural potential of the countryside
- Increasing the accessibility of historical monuments suitable for tourist visits
- Development of environmentally friendly forms of tourism
- Development of human resources

- **Main priorities of the Strategy**

There were identified four main priorities; each of them is further elaborated into particular arrangements. The list of the main priorities is below:

- **Priority A:** To create sufficient and high quality capacities for utilization of the region attractiveness by building, modernization, and maintenance of the basic and complementary tourism infrastructure.

- **Priority B:** To strengthen the existing offer of tourist activities, enlarge it towards the event tourism and balance the seasonal and off-seasonal activities.
- **Priority C:** To professionalize the management of tourism in the region via an organization that will handle marketing, coordination, further education.
- **Priority D:** To support the local, regional and international cooperation and partnerships that will facilitate the development of tourism and to motivate both employees and employers for development of tourism.

The full text of all four priorities as attached to this thesis as Appendix 2.

- **Appendices**

The strategy contains also the **Analysis of Tourism in the Vysočina Region** made up by Kunc, Šauer, Vystoupil (2006) and the **Profile of a Visitor of a Tourist Region Vysočina** processed by the Vysočina Tourism and issued in November 2007.

5.2.1 Selected arrangements involved in the evaluation

Evaluation of the Strategy will be focused only on Priority A, concretely only on the **Arrangement A.1: Building, reconstruction and modernization of collective accommodation and catering establishments**, which is concerned with the development of basic tourist infrastructure, and on the **Arrangement A.2: Building and modernization of infrastructure for sports and recreation**, which is on the contrary concerned with the complementary tourist infrastructure.

The author of this thesis considers the quality level and offer of both basic and complementary tourist infrastructure in the Region to be the key factors that are able to attract visitors and tourists and convince them to visit the region even repeatedly.

There will be explained how these arrangements are being fulfilled, the process of implementation will be described and its outcomes evaluated. Unfortunately, catering establishments are not monitored by the Czech Statistical Office; therefore only accommodation establishments were analyzed and included in the evaluation.

As the indicators quantifying the outcomes of arrangements there were selected:

- Number of projects contributing to the fulfilment of these arrangements
- Amount of financial support allocated to the projects from the selected instruments of direct financial support, namely Rural Development Programme 2007 – 2013,

Regional Operational Programme South-East 2007 – 2013 and last but not least Vysočina Fund

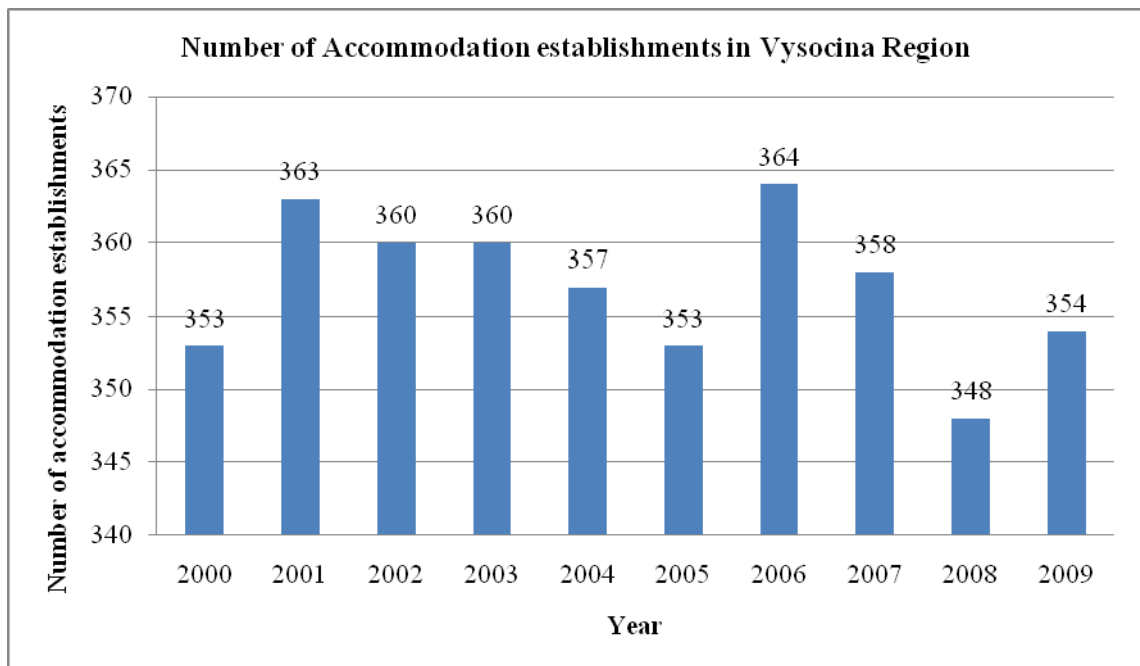
- Number of newly built beds along with the Arrangement A.1
- Number of newly built tourist trails along with the Arrangement A.2

5.3 Analysis of collective accommodation establishments in the Vysočina Region

The analysis of collective accommodation establishments in the Vysočina Region based on statistics in time series will provide a background for further evaluation of the Arrangement A.1 in terms of its effectiveness and efficiency.

5.3.1 Number of collective accommodation establishments

Figure 3: Number of collective accommodation establishments in the Vysočina Region 2000 - 2009



Source: Czech Statistical Office, processed by author

In the Figure 3 it is shown that the number of collective accommodation establishments remarkably increased in 2001, when were reported 363 collective accommodation establishments, i.e. 10 more than in the previous year. Since then the number was continuously decreasing until 2006, where was reported the highest number (364) of collective accommodation establishments within the whole observed period. Then the decreasing trend appeared again with most remarkable shift was indicated in 2008, when was reported the lowest number (348) of accommodation establishments, which

might be caused by the global financial crisis that emerged that year causing a dramatic turndown of economic activity in all industry sectors, not only in tourism.

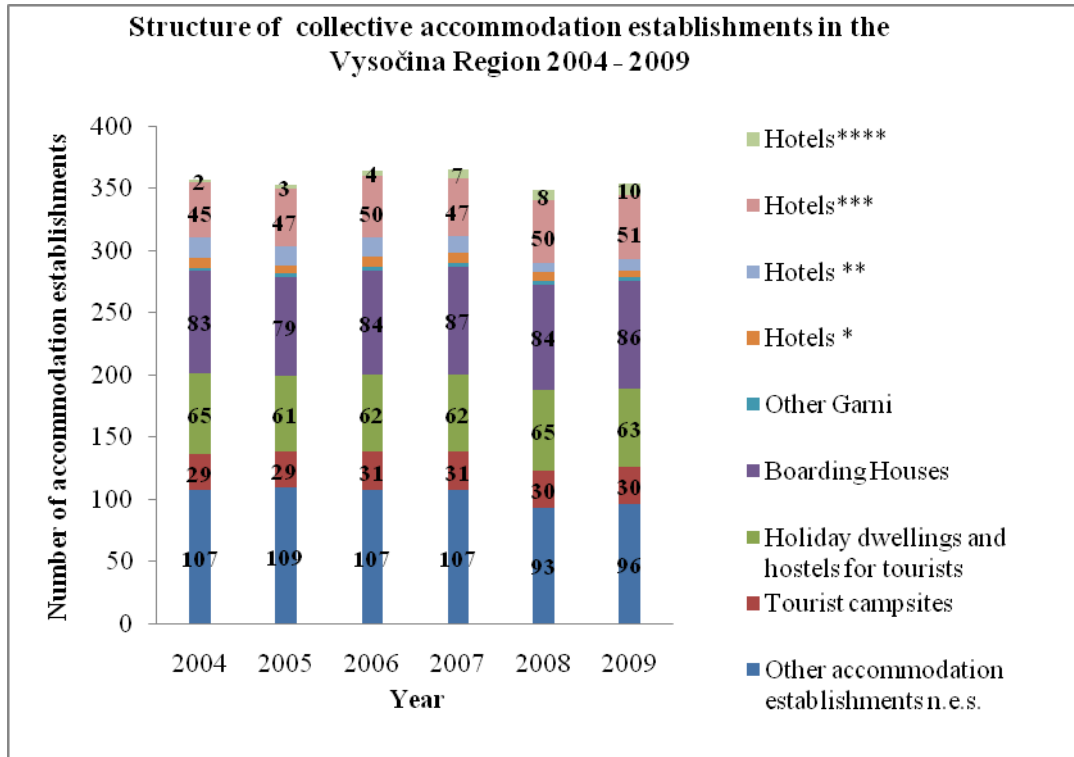
There has to be mentioned, that in the same year the lowest number of guests in the accommodation establishments was reported, which will be further shown in the Figure 10. Generally speaking, when the economy turndowns accompanied by massive redundancies appear, people are not spending money on holidays or they even cannot afford them at all and accommodation establishments have to close down because of insufficient number of guests.

However, the number of accommodation establishments increased again in 2009, which might be an effect of various subsidies that were allocated for the development of tourist infrastructure in the Region from the number of instruments of direct support for tourism development (Rural Development Programme, Regional Operational Programme, Vysočina Fund).

In reference to the Figure 9 and 10, the trend of occupancy in collective accommodation establishments both number of guests and number of overnight stays are continuously decreasing, the question is whether the Region Vysočina needs the current amount of collective accommodation establishments. The indicator Net use of beds that will be mentioned further in this thesis will provide the answer.

In the Figure 4 below there is a structure of collective accommodation establishments in the Vysočina Region in the period 2004 – 2009, where the most remarkable fact is that number of 4star hotels is continually increasing although number of other types of accommodation is relative stable. This can be considered as a positive development of accommodation diversity in the Region (from two 4star hotels reported in 2004 to ten 4star hotels reported in 2009) aiming to satisfy the needs of more demanding guests (especially non-residents) and consequently attract potential tourists seeking for high-quality accommodation.

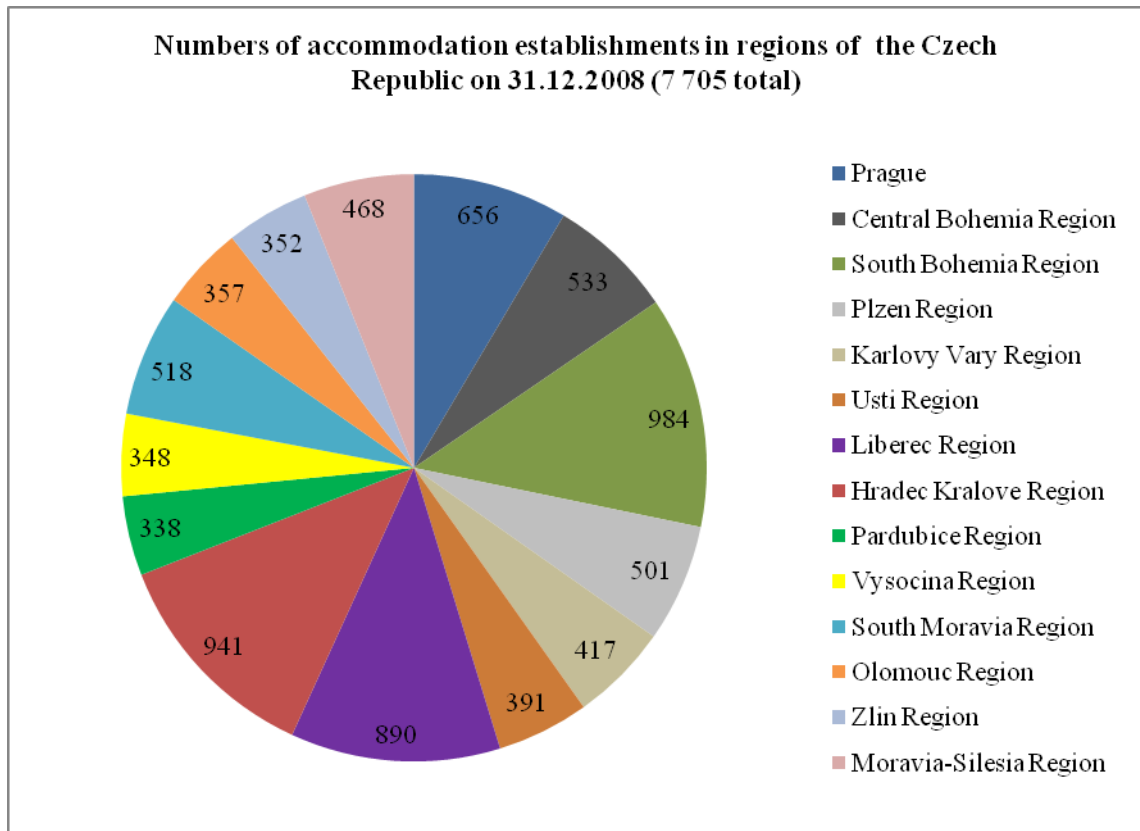
Figure 4: Structure of collective accommodation establishments in the Vysočina Region 2004 - 2009



Source: Czech Statistical Office, processed by author

Finally, an overview of collective accommodation establishments within the regions of the Czech Republic on 31 December, 2008 is provided in Figure 5. Obviously, Vysočina Region has the second lowest number of accommodation establishments (after Ústí Region) in comparison to the other regions of the Czech Republic.

Figure 5: Numbers of collective accommodation establishments in the Czech Republic on 31.12.2008



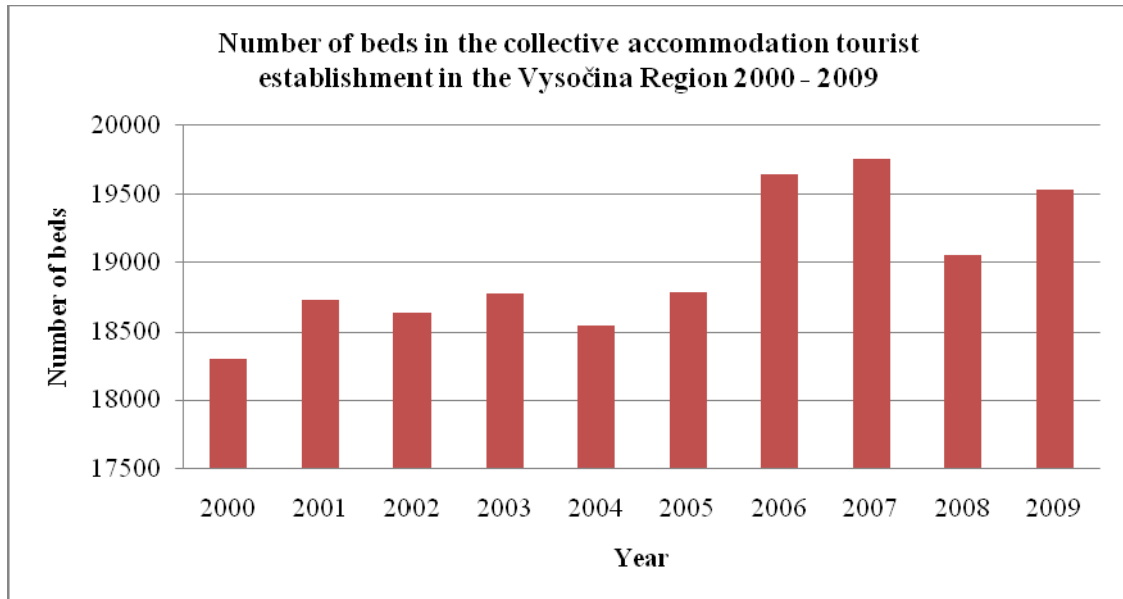
Source: Czech Statistical Office, processed by author

5.3.2 Beds in collective accommodation establishments

Tourism significance in the regions is within EU countries usually measured by the indicators of capacity and economic performance. The number of beds in accommodation is used as a capacity indicator. There should be mentioned that Czech Statistical Office monitors the number of guests in accommodation establishments with the capacity of at least 5 rooms or 10 beds.

The Figure 6 below shows the number of beds in the collective accommodation establishments in the period 2000 – 2009 in the Vysočina Region. Logically, the trend more or less follows the number of accommodation establishments.

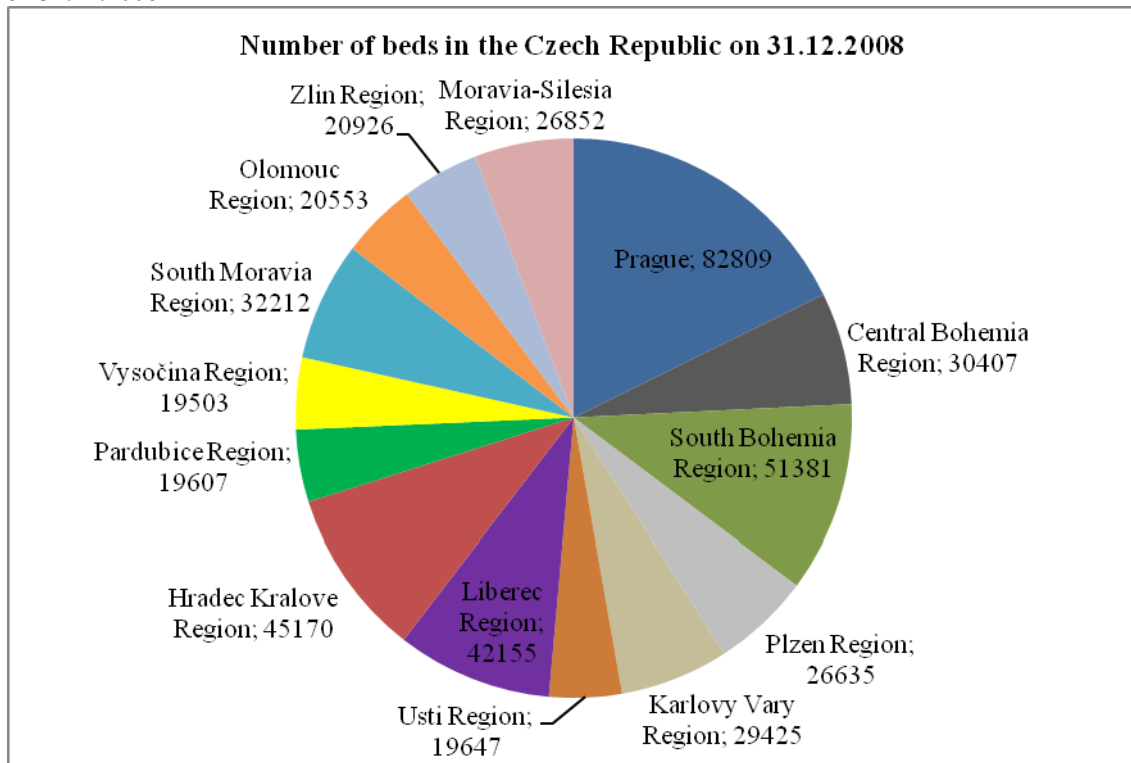
Figure 6: Number of beds in the collective accommodation tourist establishments in the Vysočina Region 2000 - 2009



Source: Czech Statistical Office, processed by author

As it is shown in the following Figure 7, the number of beds in the Vysočina Region was amounting to 19 503 in 31 December 2008 which represented the lowest capacity of beds among the regions of the Czech Republic.

Figure 7: Number of beds in collective accommodation establishment in the regions of the Czech Republic on 31.12.2008

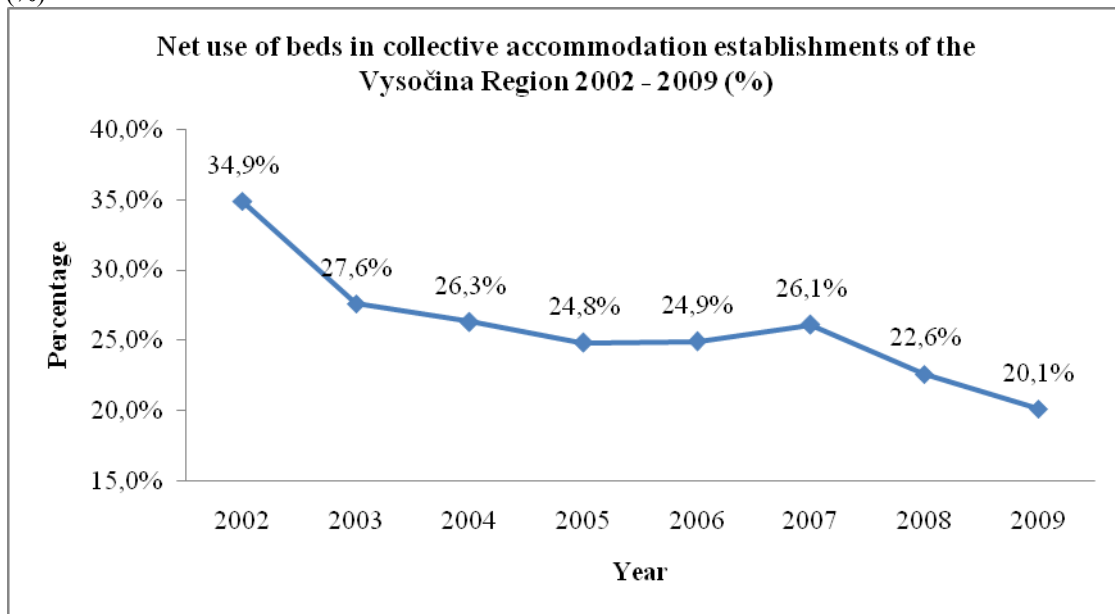


Source: Czech Statistical Office, processed by author

5.3.3 Net use of beds

More important for evaluating the capacities of accommodation establishments is the indicator *Net use of beds*, which expresses the net occupancy of beds that were available to guests. According to the Czech Statistical Office the indicator of Net use of beds “is calculated as the number of overnight stays in surveyed period divided by multiplication of average number of beds in offer and the number of operating days. Counted value is stated as a percentage (i.e. multiplied by 100)”. The average Net use of beds in the Czech Republic is 35,7% (on 31 December, 2008) and its long-term trend is rather stable.

Figure 8: Net use of beds in collective accommodation establishments of the Vysočina Region 2002 - 2009 (%)



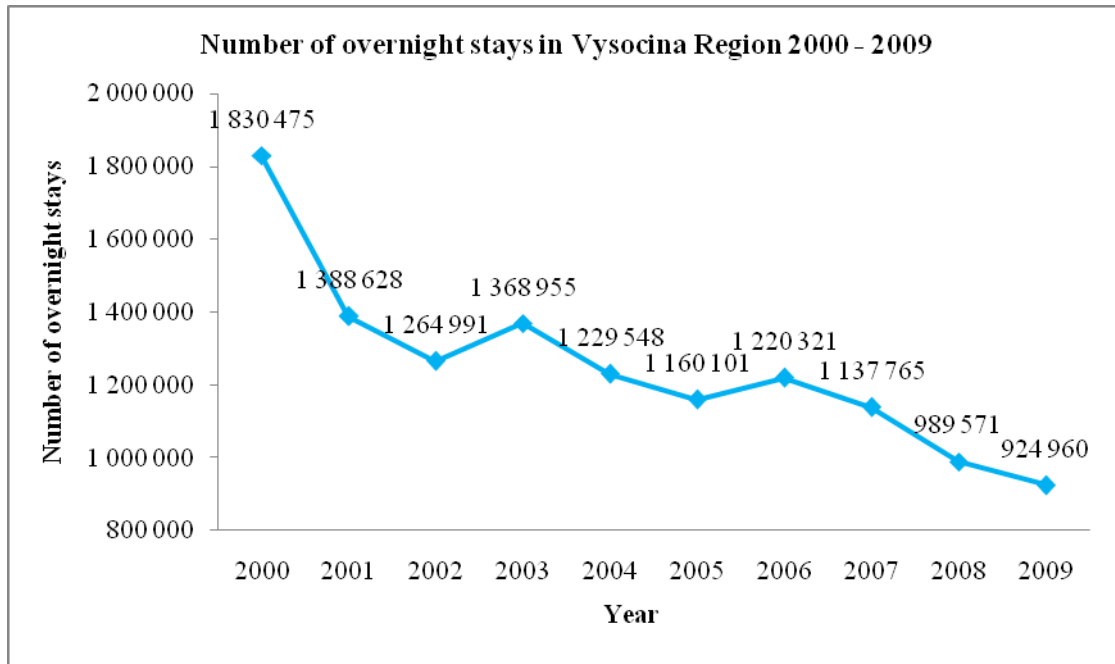
Source: Czech Statistical Office, processed by author

This Figure 8 shows that the indicator Net use of beds reported for the Vysočina Region is continually decreasing and in 2009 it was only 20,1%, reaching the lower limit of economic profitability (generally defined to be 20% in the category of Net use of beds).

This drop might be caused from several reasons, such as decreasing demand for accommodation in the Region which is demonstrated in the Figure 8 below, insufficient investments in quality improvements, or simply, there are too many accommodation establishments in the Region with regards to the number of guests staying overnight there. The history of overnight stays in the period 2000 - 2009 is specified in the Figure 9, which proves the continuous decreasing trend of overnight stays in the Vysočina Region.

In 2009, the number reached the historical minimum amounting to 924 960 overnight stays. There has to be mentioned that this decreasing trend was observed in all the regions of the Czech Republic.

Figure 9: Number of overnight stays in the Vysočina Region 2000 - 2009

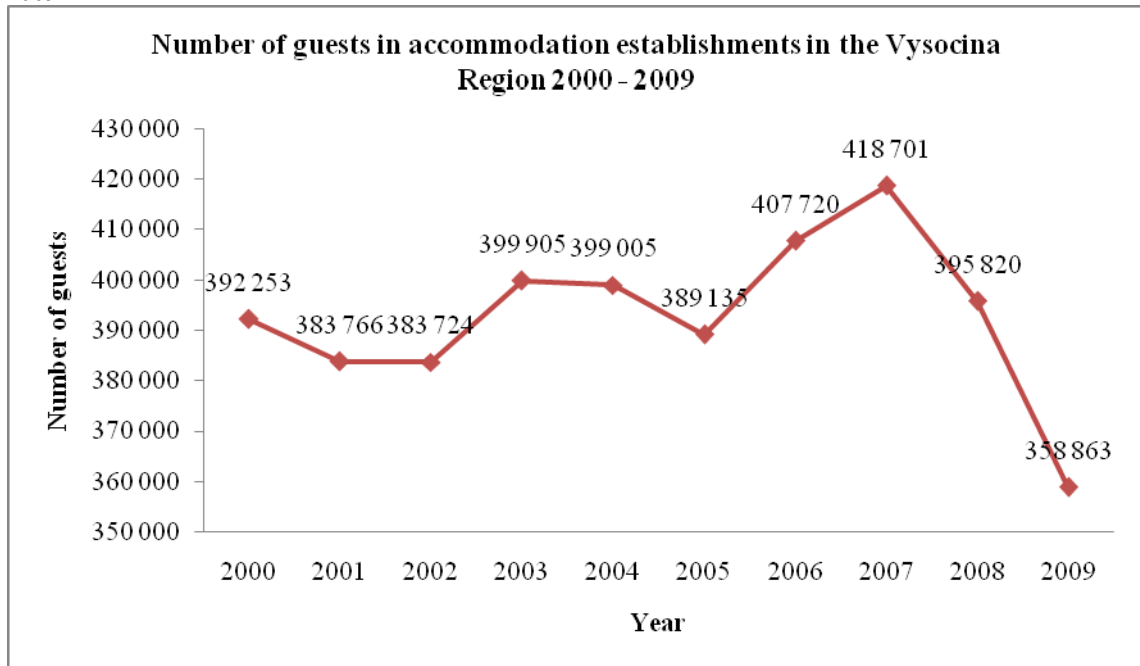


Source: Czech Statistical Office, processed by author

5.3.4 Occupancy in the collective accommodation establishments

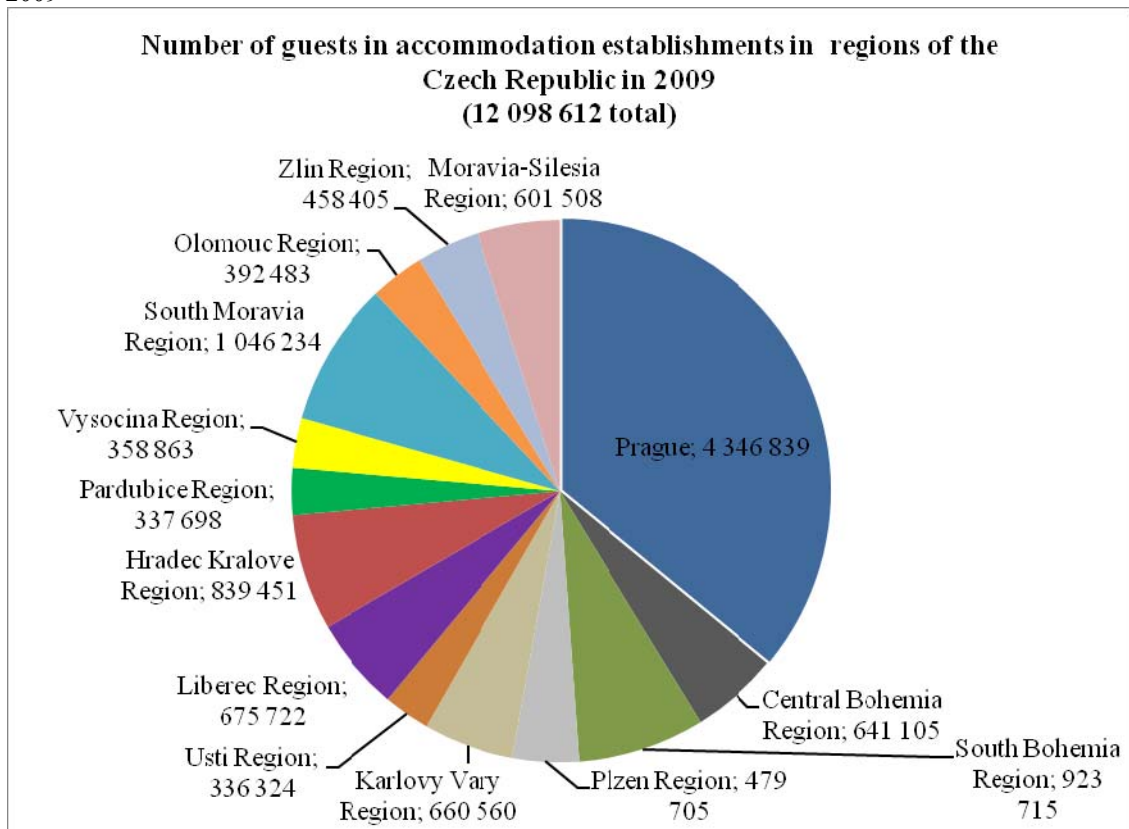
In the first Figure 10 related to the occupancy in accommodation establishment there is an apparent marked drop in the number of guests in years 2008 and 2009. The drop was observed also in majority of other regions and in the Czech Republic. Moreover, the third lowest occupancy in accommodation establishments was reported for Vysočina Region within the all regions of the Czech Republic in 2009, which is illustrated below in Figure 11.

Figure 10: Number of guests in collective accommodation establishments in the Vysočina Region 2000 - 2009



Source: Czech Statistical Office, processed by author

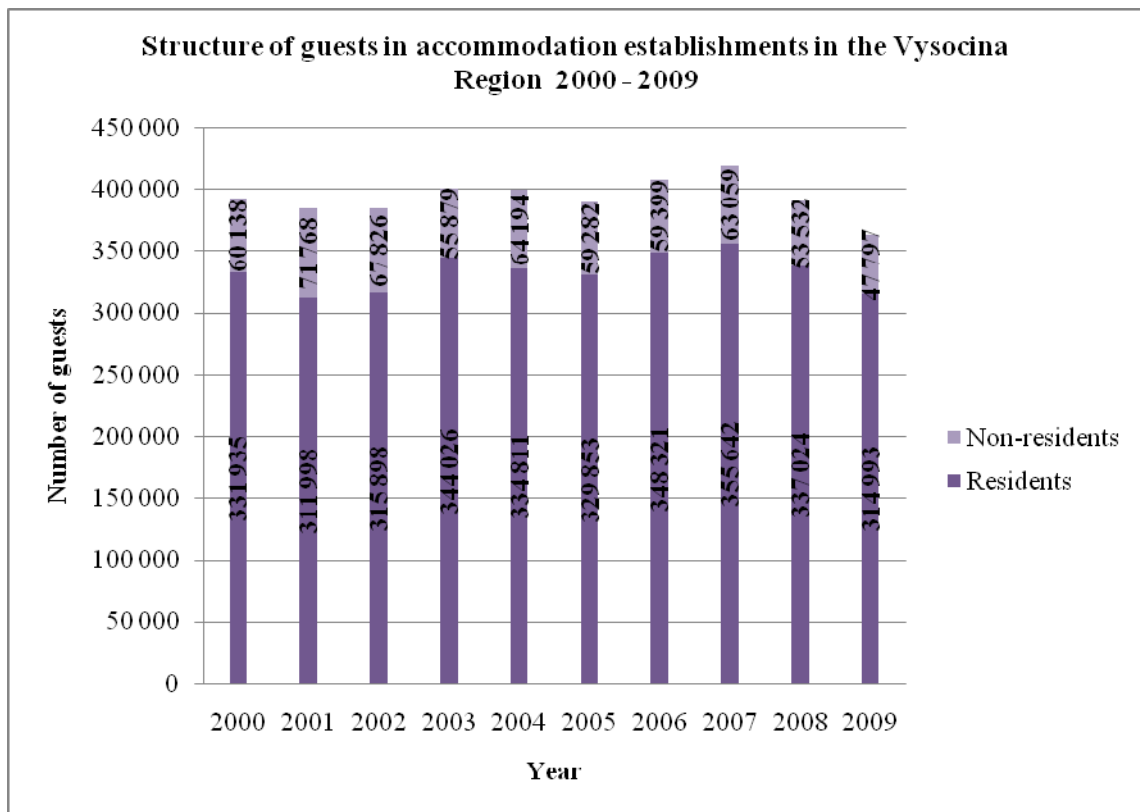
Figure 11: Number of guests in collective accommodation establishments in regions of the Czech Republic in 2009



Source: Czech Statistical Office, processed by author

The structure of guests is illustrated in the following Figure 12. From the number of non-residents related to the overall number of guests in the accommodation establishments, there was computed that the share of non-residents (foreign tourists) is relatively stable around 14%.

Figure 12: Structure of guests in collective accommodation establishments in the Vysočina Region 2000 - 2009



Source: Czech Statistical Office, processed by author

5.4 Evaluation of the Strategy implementation

In this chapter there will be evaluated how the selected Arrangements A.1 and A.2 are being fulfilled and their outcomes will be quantified. In the strategic document outlining the Strategy for tourism development in the Vysočina Region for the period 2008 – 2013 is stated that activities assuring the defined arrangements will be funded by means of financial support, which will be allocated on request from existing instruments for regional development.

As was already outlined in the Chapter 3.10, three major instruments enabling drawing a financial support for projects being in line with the arrangements defined in the Strategy are the following:

- Rural Development Programme 2007 - 2013
- Regional Operational Programme South – East 2007 – 2013
- Vysočina Fund

All of them are based on a similar principle but each works under specific conditions and have different rules and requirements, which every claimant of support is obliged to follow and meet. To be able to ask for a support, every claimant has to draw up a project in compliance with the objectives of particular instrument, meets its requirements and submits the project by a set deadline. Project can be either approved or refused. This work is considering only projects, which were approved in years 2007, 2008, 2009, and partially in 2010.

Also, there will be analyzed and evaluated the share of economic sector of Hotels and Restaurants in the Gross Value Added in the Vysočina Region based on the theory provided in the Chapter 3.8.

5.4.1 Rural Development Programme 2007 – 2013

In the period of 2007 – 2010 there were 4 calls for submitting projects requesting support according to the measure III.1.3 within the 2nd, 4th, 7th and 10th rounds of calls for submitting projects requesting support from the Rural Development Programme (RDP). Due to the fact that the process of calls for submitting requests, their administration, evaluation and finally the approval process were often overlapping from one calendar year to another it would be misleading to evaluate the process of implementation of this measure for each year 2007, 2008, 2009, and 2010. Therefore, the author of this thesis decided to evaluate this 4-year period as a whole.

Totally, there were submitted 672 requests for support from the whole Czech Republic, of which 320 were approved. More than CZK 820 million was allocated to these approved projects. As the measure is divided in to 2 parts, the allocation for the whole Czech Republic was as follows:

- a) Development and marking of hiking trails, wine paths, rest sites, horse riding paths: For 26 approved requests there were allocated 12 125 330 million CZK.

- b) Building of recreational infrastructure, recreational facilities and services:
808 342 528 CZK were allocated to 294 approved requests

In the Vysočina Region, there were supported 38 projects in the period of 2007 – 2010 within the measure III.1.3 of the Regional Development Programme. Only one project was focused on the measure III.1.3.a) Development and marking of hiking trails, wine paths, rest sites, horse riding paths. Concretely, it was a project of building the educational pedestrian route around Lhotka Village, and the beneficiary received a support amounting to 101 880 CZK (less than 1% share of the total support within this measure for the whole country). The remaining 37 approved projects were requesting a support within the measure III.1.3. b) Building of basic recreational infrastructure and the total amount of support was CZK 134 420 716, which is a 16,6 % share of the total support for the allocated for the Czech Republic as a whole.

Twenty eight of the beneficiaries of support were corporate bodies (Public Limited Companies were prevailing) and the 10 were natural persons (tradesmen).

Based on the data acquired from the Ministry of Agriculture, namely from the Department of strategy and implementation of the RDP Axis III and IV, there were indicated 416 new beds to be created in the period of 2007 – 2010 as follows:

- 2nd round – 10 approved projects, 128 planned new bed places
- 4th round – 6 approved projects, 114 planned new bed places
- 7th round – 11 approved projects, 139 planned new bed places
- 10th round – 13 approved projects, 163 planned new bed places

The process of project realization

According to the information acquired from the Ministry of Agriculture, namely from the Department of Strategy and Implementation of RDP Axis III and 15 projects were realized so far. Ten projects approved in 2nd round reported 128 of new bed places and five projects approved in 4th round reported 87 of newly built beds and newly built 2,285 kilometres of tourist trails.

5.4.2 Regional Operational Programme 2007 – 2013

In this paper is the whole period of 2007 – 2009 rather than individual years 2007, 2008, 2009 evaluated from the same reasons that were mentioned in previous Chapter 5.4.1 concerning the Rural Development Programme.

In the period of 2007 – 2009 there were 187 projects within Axis 2 of the Regional Operational Programme South-East (ROP SE) supported with the amount slightly higher than CZK 1,6 billion. About 80 % of this amount was allocated to support 104 projects concerned with the development of infrastructure for tourism (2.1) in regions of South-Moravia and Vysočina. Among the remaining 83 projects developing services in tourism in NUTS II South-East (2.2) was distributed the amount around CZK 316 million.

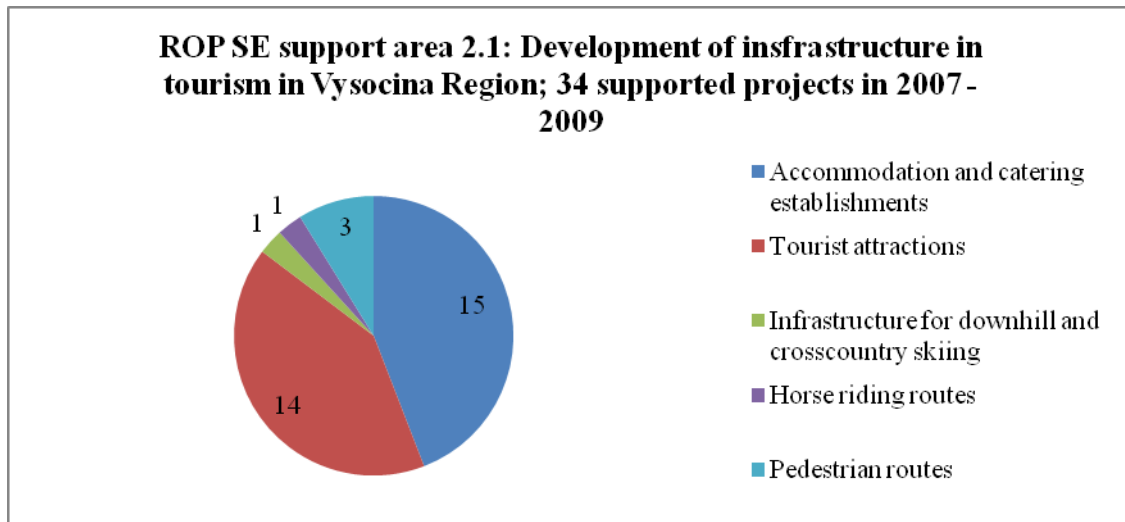
Obviously, to be able to properly evaluate the effects of the support of the ROP SE in Vysočina Region, it is necessary to involve only the projects that are intended to be implemented in the Vysočina Region.

The amount of CZK 417 922 248, which makes approximately 26 % of the lump sum of support from ROP SE allocated for Axis 2, was in the period of 2007 – 2009 allocated for tourism development in the Vysočina Region.

In total, 61 projects were supported; of which 34 were concerned with the development of infrastructure for tourism (2.1) for which was the amount of CZK 361 937 597 reserved and 27 were concerned with development of services in tourism (2.2) to be supported by the amount of CZK 55 984 651 in total.

The Figure 13 below give an overview of supported projects focused on the development of tourism infrastructure.

Figure 13: Overview of projects supported from ROP SE in the Vysočina Region 2007 - 2009



Source: List of beneficiaries available at <http://www.jihovychod.cz/cs/pro-prijemce/seznam-prijemcu>, processed by author

The process of project realization

The data were gathered from the Department of Monitoring and Evaluation of ROP SE.

From 34 projects, for which the financial support from ROP SE was approved in the period of 2007 - 2009, there were 11 projects realized in 2009 and 11 projects realized in 2010 so far and the financial support amounting CZK 177 622 931 in 2009 and CZK 115 486 082 in 2010 was spent. There were 162 new bed places built in 2009 and 154 in 2010 within the accommodation establishments located in the Region. Unfortunately, despite indices that were available to the author of this thesis, the indicator of tourist trails newly built thanks to the supported projects is not monitored by the responsible department of ROP SE.

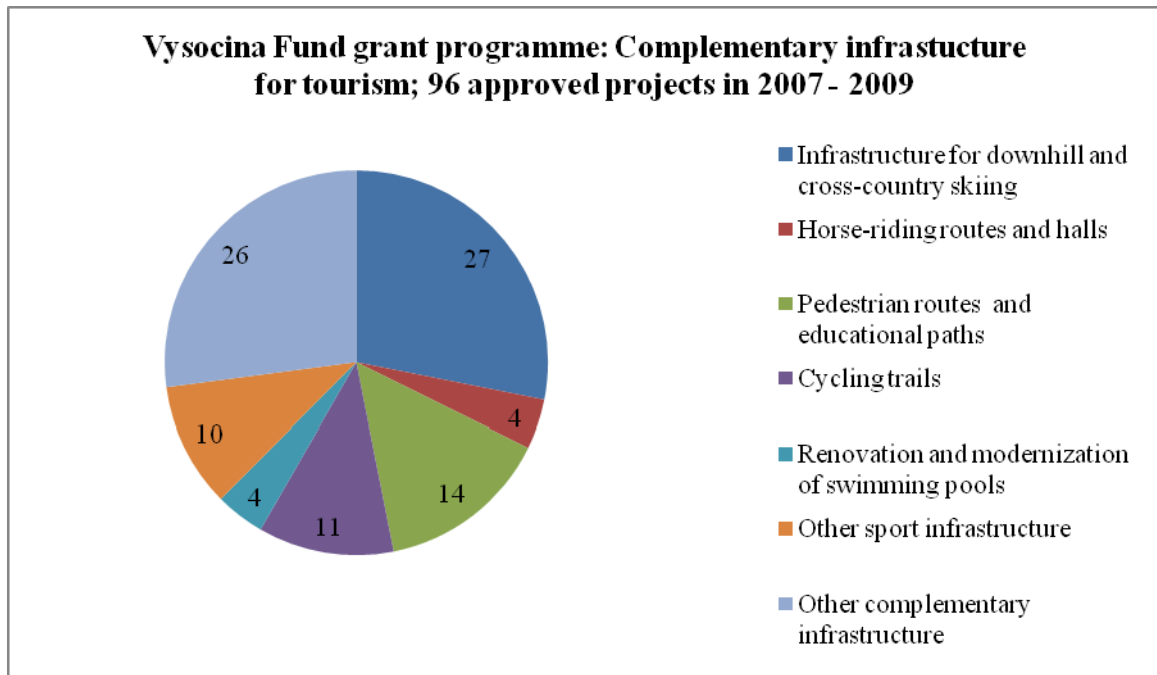
5.4.3 Vysočina Fund

Tourism development started to be supported from Vysočina Fund as of 2002, however, for the purposes of this paper were only years 2007, 2008, and 2009 considered. The maximum amount of support for each project was CZK 200 000.

In the period of 2007 – 2009, Vysočina Fund announced following grant programmes concerned with the development of tourism in the region:

- Modernization of accommodation establishments – this grant programme was announced only in 2007. 29 subjects asked for support for their projects and finally 25 projects were approved and received a support worth CZK 5 769 350 in total.
- Complementary tourism infrastructure - this grant programme was announced in 2007, 2008, and 2009. In 2007, 50 projects were submitted and 24 of them were approved. In 2008 were approved 37 projects from 43 that were submitted. Finally, from 44 projects submitted in 2009 were 35 projects approved. Totally, there were 96 projects approved and the support amounting CZK 18 218 442 was distributed in the period of 2007 – 2009. Figure 14 below indicates with what supported projects were concerned with.

Figure 14: Overview of projects supported from the Vysočina Fund 2007 - 2009



Source: List of beneficiaries available at <http://extranet.kr-vysocina.cz/fv/index.php?typ=vyh>, processed by author

With reference to the regional authority responsible for tourism in the Vysočina Region, concretely the Department of Tourism, more detailed data regarding the approved and realized projects, which drew support from the Vysočina Fund, are unfortunately not available. Moreover, the indicators of newly built bed places and kilometres of tourist trails are not monitored.

5.5 Role of tourism in the economy of the Vysočina Region

This chapter provide the analysis and evaluation of the share of economic sector of Hotels and Restaurants in the Gross Value Added (GVA) of the Vysočina Region based on the theory provided in the Chapter 3.8.

According to the Regional Account of the Vysočina Region in the period 2000 – 2009, which is attached to this thesis as Appendix 3, the following economic activities (sectors) in the Vysočina Region have the major share in the regional GVA:

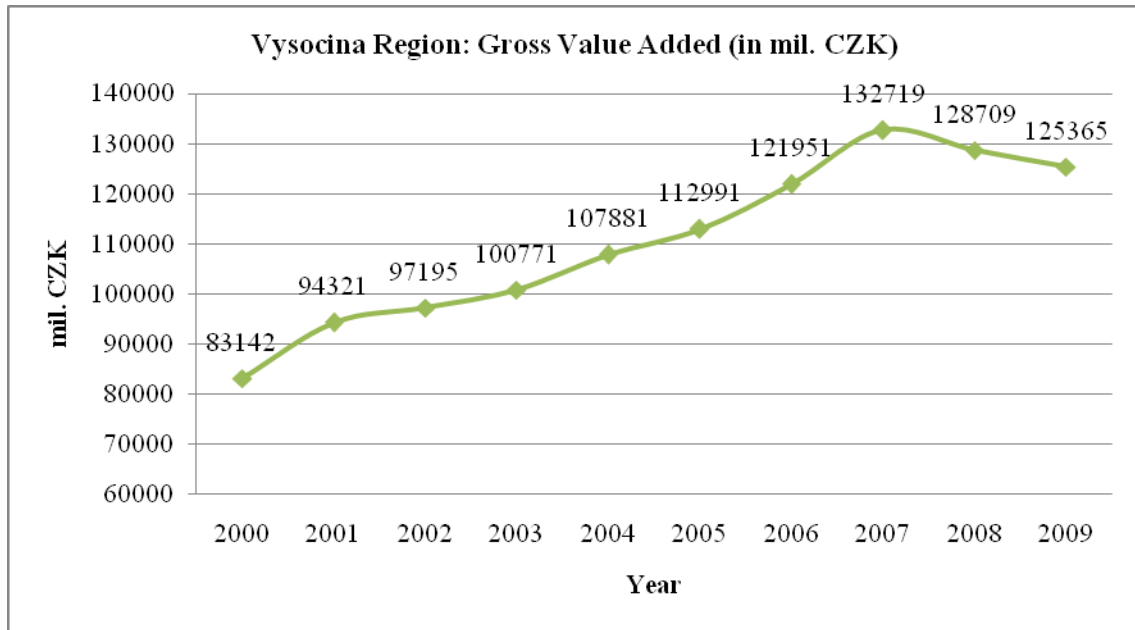
- Manufacturing – Its share on GVA is more than 30%. The share was continually increasing from 2000 till 2007, when it reached the maximum share of 39,1%. Since then the share is decreasing every year by approximately 3 %. In 2009, the share of manufacturing on total GVA was 33 %.
- Electricity, gas and water supply - its share is continually increasing as of 2000. In 2000 the share on GVA was 5,3% and in 2009 it was 11,2%.
- Trade, repair of motor vehicles, motorcycles and personal and household goods – its share is relatively stagnating and oscillates around 10% in the whole period
- Real estate, renting and business activities – this activity is gaining stable share between 8 - 9% for the whole period of 2000 – 2009.
- Agriculture, hunting and forestry – its share is continuously declining as of 2000, when the share was 11,6%. In 2009, the share was only 6,1%.

The share of Hotels and restaurants on the total regional GVA is the 3rd lowest with the ratio between 1-2% during the whole period. When comparing it to other regions based on the data from Regional Accounts of the other regions of the Czech Republic there has to be mentioned that the share is more or less the same within all regions of the Czech Republic between 1-2% except the Karlovy Vary Region (3,7% in 2009) and the Capital City of Prague (2,7% in 2009). The share of Hotels and Restaurant on the GVA of the whole Czech Republic is 1,9% in 2009.

During the observed period of 2007 - 2009 the share of economic activity of Hotels and Restaurants on regional GVA was slightly increasing, i.e. the share was 1,2% in 2007, 1,3% in 2008 and 1,5% in 2009. For illustration, Figure 15 shows the development of GVA in the Vysočina Region, while Figure 15 shows the development of GVA of Hotels

and restaurants. After continuous increasing trend observed in the period 2000 – 2007, GVA of the Region was decreasing yearly by 3% since 2007. This drop might be caused by the global financial crisis that emerged in 2008 and caused turndown in the Czech economy.

Figure 15: Gross Value Added in the Vysočina Region 2000 - 2009



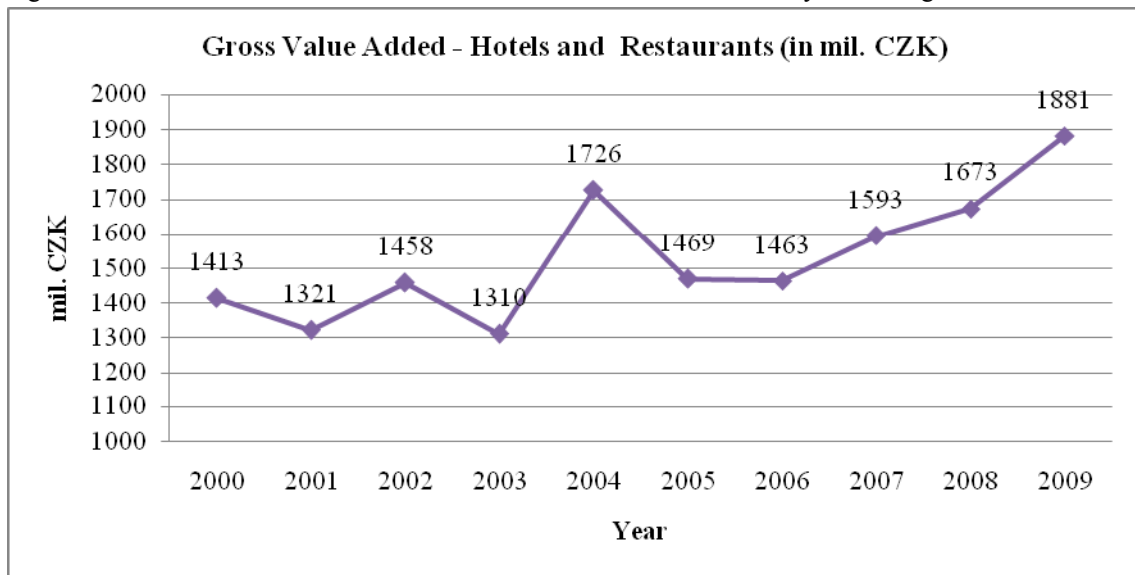
Source: Czech Statistical Office, processed by author

On the other hand, the GVA of Hotels and Restaurants, as it is indicated in Figure 16, was increasing since 2007. Yearly comparisons were computed as follows:

- 2006/ 2007: increase by 8%
- 2007/ 2008: increase by 5%
- 2008/ 2009: increase by 12%

This trend may be caused by increasing prices for accommodation and catering services.

Figure 16: Share of Hotels and Restaurants in Gross Value Added of the Vysočina Region 2000 - 2009



Source: Czech Statistical Office, processed by author

5.6 Results and Discussion

5.6.1 Results

All the above finding enabled the quantification of almost all of the indicators designated in this work for the evaluation of the implementation process of the Strategy, already mentioned in the Chapter 5.2.1.

Furthermore, the role of tourism in the economy of the Vysočina Region was demonstrated on the share of Hotels and Restaurants in the Gross Value Added of the Region and declared slightly increasing trend, although the total GVA of the Region was decreasing.

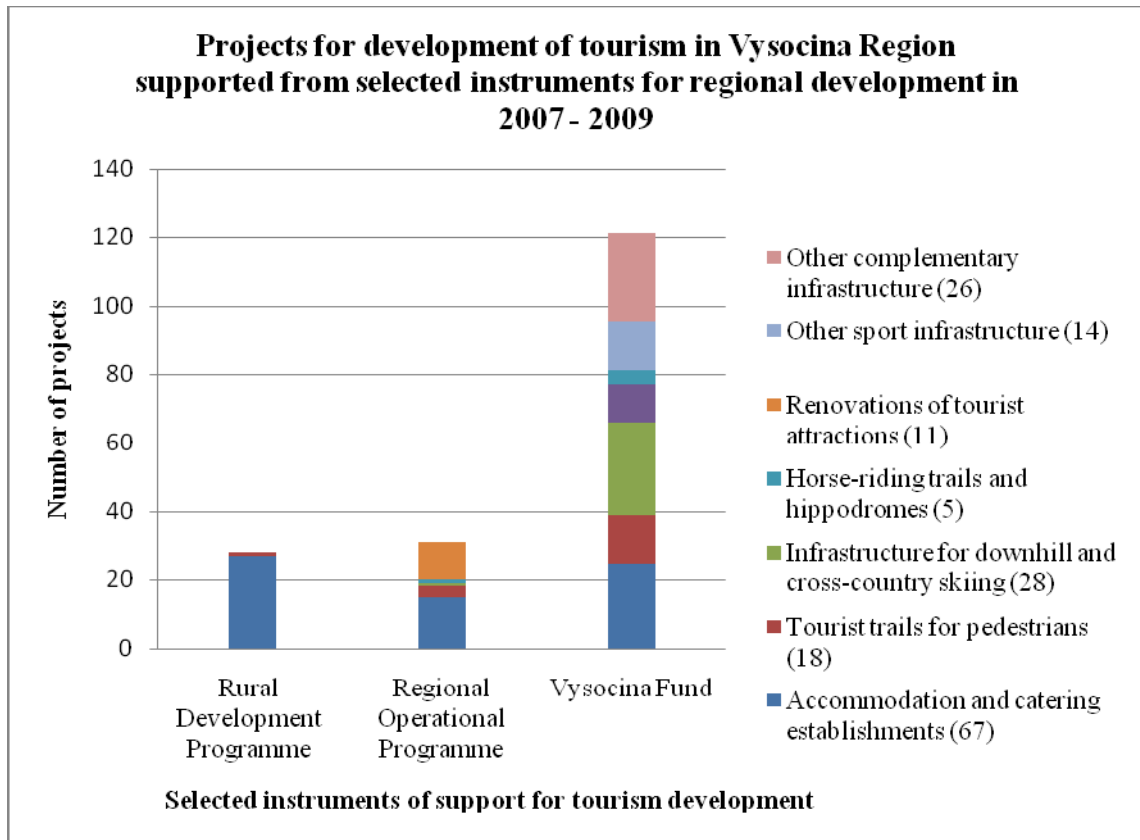
The selected indicators were evaluated as follows:

- **Number of projects contributing to the fulfilment of selected arrangements A.1 and A.2**

Totally, there were 180 projects supported concerned with the development of basic and complementary tourist infrastructure within the observed period. Almost 40% (67 projects) were aimed to build or renovate the accommodation and catering establishments. 28 projects were developing the infrastructure for downhill and cross-country skiing, 18 projects were focused on building the tourists trails for pedestrians, 11 projects on building the cycling routes, and 5 projects were focused on horse riding.

There was also supported about 40 projects concerned either with the development of sport or other complementary infrastructure but it was impossible to sort them out clearly within the major categories. Figure 17 below shows how each selected instrument contributed to the development of basic and complementary infrastructure in the Vysočina Region.

Figure 17: Overview of projects for development of tourism in the Vysočina Region supported from selected instruments for regional development in 2007 - 2009



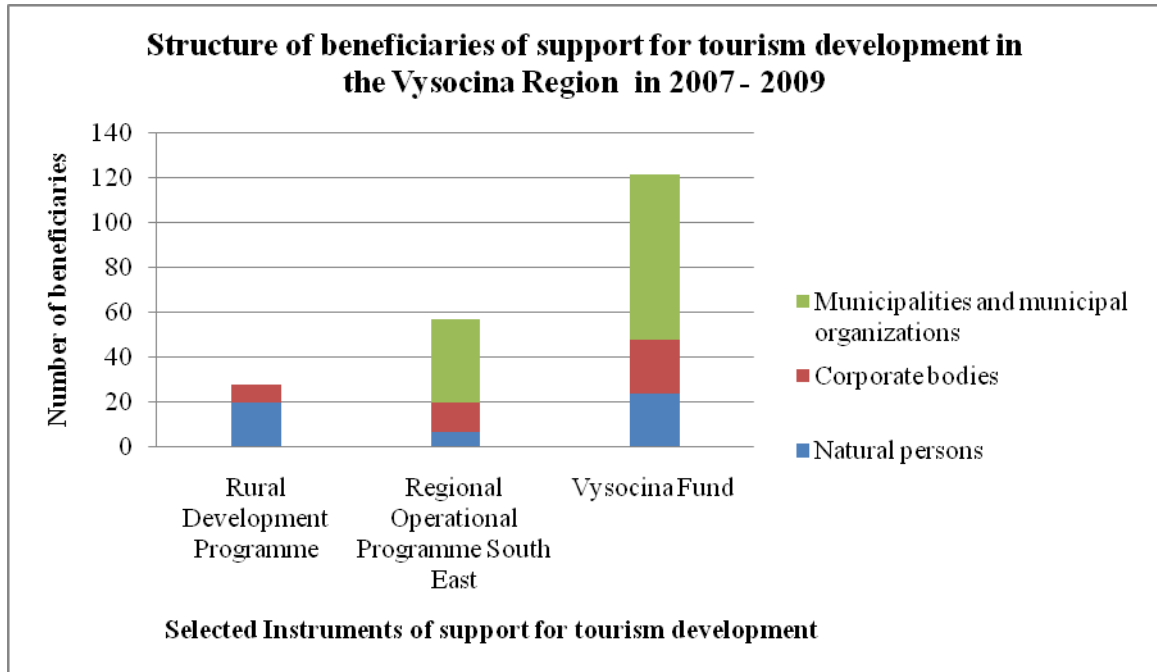
Source: Lists of beneficiaries of support of selected instruments, processed by author

The analysis of lists of beneficiaries of support of each instrument enabled the identification of beneficiaries of support in the Vysočina Region in the observed period, i.e. municipalities or municipal organization, corporate bodies, or natural persons. The structure was indicated as follows:

- 110 of beneficiaries were municipalities or organizations founded by municipalities,
- 51 of beneficiaries were natural persons,
- 45 beneficiaries were corporate bodies.

The structure of beneficiaries of support in terms of each instrument is illustrated in Figure 18.

Figure 18: Structure of beneficiaries of support for tourism development in the Vysočina Region in 2007 - 2009



Source: Lists of beneficiaries of support of selected instruments, processed by author

- **Amount of financial support allocated to the projects related to the Arrangement A.1 and A.2 from the selected instruments of direct (financial) support**

Overall, there was the financial support amounting to more than CZK 520 million allocated for the development of basic and complementary infrastructure in the Vysočina Region in the period 2007 – 2009. Each selected instrument contributed to this amount as follow:

- Rural Development Programme 2007 – 2013: CZK 134 522 596
- Regional Operational Programme South East 2007 – 2013: CZK 361 937 597
- Vysočina Fund: CZK 23 987 792

There needs to be clarified that these amounts refer for the projects, to which support was approved and the projects have not been realized yet.

- **Number of newly built beds along with the Arrangement A.1**

This indicator was possible to gather only for the Rural Development Programme and Regional Operational Programme South East 2007 – 2013 and unfortunately not for the Vysočina Fund, as was already mentioned in Chapter 5.4.3.

According to the data gathered from the Rural Development Programme and Regional Operational Programme, there were reported 531 of newly built beds by means of already realized projects that were supported in the Vysočina Region in the period 2007 – 2009 (215 through RDP and 316 through ROP).

- **Number of newly built tourist trails along with the Arrangement A.2**

Unfortunately, data for this indicator was possible to obtain only from Rural Development Programme, where only 2, 285 kilometres of newly build tourist trails were reported. Both Regional Operational Programme and Vysočina Fund do not monitor newly built kilometres of tourist trails. Nevertheless, as was already mentioned, there were 18 projects supported which were focused on building the tourists trails for pedestrians, 11 projects on building the cycling routes, and 5 projects were focused on horse riding in the Region in the period 2007 – 2009 (majority of them supported through Vysočina Fund). Although the exact data regarding newly built kilometres are not available, it can be generally said, that the arrangement A.2 is being fulfilled.

5.6.2 Discussion

Results indicated that selected arrangements for the development of basic and complementary infrastructure are being fulfilled in compliance with the defined Strategy for tourism development in the Vysočina Region for the period 2008 - 2013. However, taking into account the analysis of collective accommodation establishments made in the Chapter 5.3, where the continuous decrease of guests was demonstrated, it is disputable whether the increasing capacity of collective accommodation establishments is desirable and efficient. From the point of view of entrepreneurs in accommodation it may be even counterproductive, as was shown on the indicator Net use of beds, which reached the lower limits of profitability in 2009.

The major weakness of Strategy can be thus considered the absence of quantifications of expected and desired outcomes that would specify the capacity limits, when the further capacity increase is no longer desirable. The improvement of quality of accommodation establishments and respective services was declared by increasing number of 4star hotels located in the Vysočina Region.

These results were discussed Ing. Pavel Čihák, director of Vysočina Tourism, during the semi structured interview that was held on March 3, 2011 in Jihlava. Mr. Čihák confirmed that increasing the accommodation capacity in the Vysočina Region is due to the long-term decrease of guests no longer desirable. He conceded that existing strategic document outlining the Strategy for tourism development in the Vysočina Region for the period 2008 – 2013 was made up primarily to enable drawing support from various financial instruments for tourism development. In other words, if a potential beneficiary of support points out that his project is in line with the defined regional strategy for tourism development, he gains a better position to have his project approved and get the support. He agreed with my opinion that the arrangements set in the strategy are defined too broadly and quantifications are missing. Mr. Čihák also further confirmed that the financial crisis negatively affected tourism in the Vysočina Region and mentioned the multiplier effect of tourism being nowadays in the opposite (i.e. negative) mode than should be. Moreover, he pointed out the unwillingness of entrepreneurs in accommodation to cooperate with Vysočina Tourism in terms of promotional activities, even when the promotion is free of charge.

Author of this thesis believes that findings made by the evaluation may prove the necessity of the Strategy modification in order to avoid the other possible strategy failures due to the absence of quantifications of desired outcomes. As it was shown, a considerable amount of money is spent for tourism development in the Vysočina Region either from the funds of the European Union or from the state budget of the Czech Republic. Nowadays, when the Czech public sector is facing quite significant government cuts, it is more than ever desirable to spend money only on activities that would be really beneficial to the Vysočina Region in terms of tourism development and not only casually support projects being in line with defined arrangements, without taking into account the current situation of tourism in the Vysočina Region and without measuring whether the outcomes from these projects are truly beneficial.

6. Conclusion

The aim of this thesis was to evaluate the Strategy for tourism development in the Vysočina Region for the period 2008 – 2013 (Strategy). Obviously, the evaluation was made in the middle of the specified period and therefore covers only the first three years. However, based on the theory provided in the Chapter 3.3, evaluation of strategy should be performed on continuous bases, rather than at the end of specified period. The same Chapter further explained that within the strategy evaluation internal and external factors have to be reviewed, performance arising from the strategy should be measured and corrective actions must be taken when necessary. Two main arrangements of the Strategy concerning the development of basic tourism infrastructure were selected, concretely collective accommodation establishments, and complementary tourism infrastructure for sports and recreation.

The analysis of collective accommodation establishments in the Vysočina Region based on the data from Czech the Statistical Office was made and the number and capacity of collective accommodation establishments and occupancy in these accommodation establishments were reviewed.

Several indicators were selected for the performance measurement and their quantification provided the measurement of how the Strategy is being implemented. Base for this quantification were the data from selected financial instruments, namely Rural Development Programme 2007 – 2013, Regional Operational Programme South-East 2007 – 2013, and Vysočina Fund, that were either publicly available or were gathered on request from responsible departments of these instruments.

Quantifications proved that the strategy is being fulfilled in line with the selected arrangements. It was shown how each financial instrument contributes to the development of tourism in the Vysočina Region, i.e. what amount of financial support was allocated for the projects concerned with development of tourism infrastructure in the Vysočina Region. The precise number of projects supported through these instruments was identified, as well as what they were concerned with. Concrete number of beds that were already built thanks to the supported projects was also reported. Unfortunately, data for the indicator of newly built trails was possible to obtain only from one instrument.

Within the evaluation there was also analyzed the role of tourism in the Vysočina Region through the share of economic activity of Hotels and Restaurants on the Gross

Value Added of the Vysočina Region. The analysis indicated slightly increasing trend of economic activity of hotels and restaurants in the Region although the total Gross Value Added was decreasing during the observed period.

During the evaluation of the Strategy it was found out how the absence of quantifications of expected outcomes defined in the strategic document may lead to the situation when the strategy becomes ineffective. The proof for this finding was observed during the evaluation of development of basic tourism infrastructure in the Vysočina Region. The need for increasing the capacity of collective accommodation establishments was proclaimed in the Strategy despite the continuous long-term decrease of guests in collective accommodation establishments. Regardless of this fact, many projects concerned with building of new accommodation establishments was supported and the number 531 beds newly built in the period 2007 – 2009 was reported. In 2009, the indicator of Net use of beds in the Vysočina Region dropped to the lower limits of profitability, which indicated the negative impact of increased capacity on business in collective accommodation in the Vysočina Region. These findings were confirmed by Ing Pavel Čihák, director of Vysočina Tourism.

Author of this thesis believes that findings made by the evaluation may prove the necessity of the Strategy modification in order to avoid the other possible Strategy failures due to the absence of quantifications and detailed specifications of desired outcomes reflecting the needs and requirements of tourists visiting the Vysočina Region.

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8. List of Abbreviations

EAFRD	European Agricultural Fund for Rural Development
ERDF	European Regional Development Fund
ESA	European System of Accounts
EUROSTAT	Statistical Office of the European Union
GVA	Gross Value Added
NUTS	Nomenclature of Territorial Units for Statistics
RDP	Rural Development Programme
ROP	Regional Operational Programme
TSA	Tourism Satellite Account

9. Supplements

- Appendix 1: SWOT analyses of the Vysočina Region in terms of tourism
- Appendix 2: Main priorities of the Strategy for tourism development for the period 2008 - 2013
- Appendix 3: Regional Account of the Vysočina Region 2000 - 2009
- Appendix 4: Certificate of Completion of workshop for professionals in tourism
“Explore the Regions of the Czech Republic”

Appendix 1: SWOT Analyses of the Vysočina Region in terms of tourism potential

Natural Conditions

Strengths	Weaknesses
<ul style="list-style-type: none"> ▪ Location in the centre of the Czech Rep. ▪ Well preserved landscape and the environment ▪ Many protected areas with various trails 	<ul style="list-style-type: none"> ▪ Bad water quality of ponds and lakes (not suitable for swimming) ▪ Low water level of rivers (not suitable for water sports)
Opportunities	Threats
<ul style="list-style-type: none"> ▪ Attractive nature and landscape creating a positive image of the region ▪ Potential for development of sustainable tourism 	<ul style="list-style-type: none"> ▪ Danger of nature deterioration caused by injudicious investment activities (solar and wind power plants) ▪ Landscape damage due to unorganised and unsystematic development of tourism ▪ Climate change – uncertain snow conditions

Attractiveness of the region, tourism infrastructure

Strengths	Weaknesses
<ul style="list-style-type: none"> ▪ Significant cultural potential – historical monuments and towns (3 of them on the UNESCO list) ▪ Network of trails for hiking, cycling and good conditions for mountaineering ▪ Conditions for cross-country skiing ▪ Potential for tourism focused on horse-riding ▪ Good transport infrastructure from Prague and Brno 	<ul style="list-style-type: none"> ▪ Insufficient accommodation capacity, low quality of accommodation, absence of accommodation for demanding tourists ▪ Unsatisfactory infrastructure and services for both indoor and outdoor activities (cycling, skiing, wellness programmes etc.) ▪ Historical monuments in bad technical conditions ▪ Lack of public lavatories
Opportunities	Threats
<ul style="list-style-type: none"> ▪ Reconstruction and restoration of the historical monuments ▪ Nice looking villages in the region ▪ Creation of cycle trails, ski slopes etc. together with appropriate equipment and services ▪ Improvements in quality of accommodation and also extending the offer of various types of accommodation ▪ Better transport infrastructure ▪ Investments to sport infrastructure and equipment ▪ Increasing number of holidays together with their shortening (tourist destinations) 	<ul style="list-style-type: none"> ▪ Excessive and inadequate requirements of nature conservationists are limiting for development of tourism ▪ Problems of unsolved property ownerships ▪ Negative perceptions of residents towards tourists ▪ Tourism loses its position in terms of regional development priorities ▪ Less events supporting tourism in the region ▪ Less financial investments in the maintenance of the historical monuments ▪ Decay and deterioration of the regional historical monuments

have to be easily accessible in terms of distance and time)	
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Tourist Services, products and activities

Strengths	Weaknesses
<ul style="list-style-type: none"> ▪ Facilities for both summer and winter sport outdoor activities ▪ Various traditional and cultural events for different target groups ▪ Unique topics of the event (Festival of Records in Pelhrimov, Czech famous personalities – Hasek, Santini, Mahler) ▪ Potential for sport fishing and hunting ▪ Significant number of visitors and tourists from the region itself and from neighbouring regions 	<ul style="list-style-type: none"> ▪ Little opportunities for experience and educational tourism ▪ Traditional regional products inadequately promoted ▪ No offer of traditional regional meals ▪ Weak alternative activities in case of unfavourable weather ▪ High degree of seasonality ▪ Cultural potential of the region not fully utilized ▪ Activities of towns or parts of the regions are not interconnected and coordinated as a whole
Opportunities	Threats
<ul style="list-style-type: none"> ▪ Increasing demand for leisure and sport activities (cycling, hiking, horse riding, cross country skiing...) ▪ Enlarging target groups of seniors and also persons interested in agrotourism ▪ Increasing interest in healthy lifestyle and wellness programmes ▪ Increasing interest in domestic tourism ▪ Tourist potential of regional historical monuments for sightseeing and educational tourism ▪ Developing opportunities for incentive and congress tourism ▪ Focus on family holidays ▪ Introduction of various crafts, products and meals typical for the region ▪ Cooperation with neighbouring regions (also from abroad - Lower Austria) 	<ul style="list-style-type: none"> ▪ Strengthening position and development of competitive regions ▪ Outflow of visitors due to unsatisfactory quality level of accommodation and catering services and unprofessional supplement services ▪ No progress in improving the quality of hospitality is damaging the image of the region ▪ No attractive tourist programmes will lead to loss of interest ▪ Economic recession in the Czech Republic and decreasing purchasing power of domestic population

Organization, marketing, communication and informational services in tourism

Strengths	Weaknesses
<ul style="list-style-type: none"> ▪ Dense network of tourist centres with appropriate equipment ▪ Active work of local municipalities for development of tourism ▪ Creation of attractive both regional and local promotional brochures and other products ▪ Professional regional tourist website, increasing cooperation of tourist centres in database update 	<ul style="list-style-type: none"> ▪ Carrier in tourism not considered to be perspective in the region ▪ Small number of visitors and low share on the total amount of visitors in the Czech Rep. ▪ No programme packages, various offers not connected ▪ No regional brand, logo, advertising slogan ▪ Lack of promotional brochures and other materials in the tourist centres ▪ Weak communication between various subjects concerned with the development of tourism (esp. private vs. public sector) ▪ No strategy of tourism development on the regional and local level
Opportunities	Threats
<ul style="list-style-type: none"> ▪ Establishment of marketing organization that will manage tourism activities throughout all region, covering cooperation of public and private sector ▪ Increasing importance of e-marketing and on-line booking ▪ Improvements in communication between all subjects involved in tourism, in motivation of entrepreneurs to cooperate and to agree on the collective approach of development ▪ Creation of regional information, monitoring and booking system ▪ Strengthening the consciousness of local inhabitants about the economic importance of tourism for their region 	<ul style="list-style-type: none"> ▪ Unwillingness of subjects involved in tourism situated in Prague to provide information promoting the other parts of the Czech Republic ▪ Weak cooperation preventing the optimal development of tourism ▪ Uncoordinated and split promotional activities with minimal effect ▪ Insufficiently updated regional databases will threaten the quality of sharing and providing information

Human resources, financing

Strengths	Weaknesses
<ul style="list-style-type: none">▪ Secondary schools and universities focused on education in tourism▪ Regional grant programme “ Vysočina Fund”	<ul style="list-style-type: none">▪ Unqualified labour force, bad language and communication abilities of people working in hospitality▪ Unwillingness of hospitality providers to participate on projects concerned with tourism development▪ Travel offices and agencies being corrupted by Prague hotels▪ Insufficient communication and cooperation between private and public sector and also inside these sectors▪ Trainings increasing skills of professionals in tourism being underestimated
Opportunities	Threats
<ul style="list-style-type: none">▪ Further education and training of professionals▪ Opportunity of interregional and cross-border partnership in EU projects▪ Efforts of the region to initiate legislation for the benefit of tourism▪ Possibility of drawing money from the structural funds	<ul style="list-style-type: none">▪ Lack of financial resources from the “Vysočina Fund” for tourism▪ Inability to draw money from EU

Appendix 2: Main priorities of the Strategy for tourism development in the Vysočina Region for the period 2008 - 2013

Priority A: To create sufficient and high quality capacities for utilization of the region attractiveness by building, modernization, and maintenance of the basic and complementary tourism infrastructure.

- Arrangement A.1: Building, reconstruction and modernization of accommodation and catering establishments
- Arrangement A.2: Building and modernization of establishments for sports and recreation
- Arrangement A.3: Building, enlargement and improvement of infrastructure for congress tourism
- Arrangement A.4: Creation of favourable environment for cultural and sightseeing tourism

Priority B: To strengthen the existing offer of tourist activities, enlarge it towards to the event tourism and balance the seasonal off-seasonal activities.

- Arrangement B.1: Development of specific regional tourism products.
- Arrangement B.2: Development of conditions for environmentally friendly forms of tourism.

Priority C: To professionalize the management of tourism in the region via an organization that will handle marketing, coordination, further education, and regional information system

- Arrangement C.1: More sophisticated preparation and realization of product-based tourist offer
- Arrangement C.2: Promotion of tourism offer on the regional, national and international level

Priority D: To support the local, regional and international cooperation and partnerships that will facilitate the development of tourism and to motivate both employees and employers for development of tourism.

- Arrangement D.1: Functional and effective partnerships as a principle for development of regional tourist offer
- Arrangement D.2: Improvement of hospitality services in tourist establishments
- Arrangement D.3: Operation of tourist information centres

Appendix 3: Regional Account of the Vysočina Region 2000 - 2009

REG00047 The Vysocina Region

Indicator	Unit	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Gross Value Added	million CZK	83142	94321	97195	100771	107881	112991	121951	132719	128709	125365
in %:											
A Agriculture, hunting and forestry	%	11,6	11,3	9,6	8,9	9,1	8,7	7,2	6,9	7	6,1
B Fishing	%	0,1	0	0	0,1	0,1	0,1	0,1	0	0	0
C Mining and quarrying	%	0,2	0,2	0,2	-0,1	0,1	0,1	-0,1	-0,3	-1,3	-1,5
D Manufacturing	%	34,3	33,3	34	33,5	36,3	35,4	36,4	39,1	36,6	33,2
E Electricity, gas and water supply	%	5,3	5,7	5,9	6,7	6,2	7,2	7,8	7,2	8,8	11,2
F Construction	%	5,7	5,6	5,6	5,6	6,1	5,9	6,1	6,5	7	7,3
G Trade; repair of motor vehicles, motorcycles and personal and household goods	%	8	7,4	9	9	8,1	8,9	8,1	8,2	7,7	7,8
H Hotels and restaurants	%	1,7	1,4	1,5	1,3	1,6	1,3	1,2	1,2	1,3	1,5
I Transport, storage and communication	%	9,3	9,3	10,3	10,3	8,8	9,3	9,4	8,5	9,5	10,2
J Financial intermediation and insurance	%	1,1	1,1	1	1,2	1,3	0,9	0,9	1,1	1,3	1,4
K Real estate, renting and business activities	%	9,8	11,9	9,2	8,7	8,7	8,5	8,6	8,2	8,5	8,3
L Public administration and defence, compulsory social security	%	3,5	3,5	3,8	4,1	3,5	3,6	3,7	3,5	3,7	4
M Education	%	4,2	4	4,1	4,4	4,1	4,3	4,2	4,1	4,4	4,7
N Health and social work	%	3,6	3,7	4,1	3,9	3,7	4,1	4,3	4	3,6	3,9
O Other community, social and personal service activities	%	1,6	1,4	1,7	2,4	2,2	1,8	2	1,8	1,8	1,8
P Private households with employed persons	%	0	0	0	0	0	0	0	0	0	0
Q Extra-territorial organizations and bodies	%	0	0	0	0	0	0	0	0	0	0
Regional GDP, current prices, in CZK	million CZK	91765	104045	106930	110837	120038	126025	135150	147647	142955	139522
Regional structure GDP, CR = 100	%	4,2	4,4	4,3	4,3	4,3	4,2	4,2	4,2	3,9	3,8
GDP per capita in CZK	CZK	178550	203257	209289	217097	235264	247109	264423	288061	277913	270743
Regional GDP per capita, CR = 100	%	83,8	88,3	86,6	85,9	85,3	84,8	84,2	84,1	78,6	78,3
Regional GDP per capita, EU27 = 100	%	57,2	62	60,9	62,9	63,9	64,3	64,8	67,1	63,1	62,9
RGDP at constant prices, y-o-y = 100	%	105	106,7	102	102,9	103,7	106,9	106,6	105	96,9	94,1
Regional GFCF	million CZK	28150	27083	25457	25451	27306	30552	26000	33271	24687	:
Share of region on total GFCF, CR = 100	%	4,6	4,1	3,8	3,7	3,8	4,1	3,3	3,7	2,8	:
Regional GFCF per capita	CZK	54772	52908	49826	49850	53517	59906	50869	64912	47993	:
GFCF per capita, CR = 100	%	91,9	82	75	74	75,1	82,6	65,6	75,3	56,7	:
Disposable Income of Households, Net	million CZK	53120	56524	60590	63201	66488	68794	74871	82495	88958	87542
Disposable Income of Households, Net, CR = 100	%	4,6	4,6	4,7	4,7	4,8	4,7	4,7	4,7	4,7	4,6
DIHN per capita	CZK	103358	110422	118589	123792	130310	134889	146485	160948	172941	169876
DIHN per capita CR = 100	%	91,1	92,2	94,7	94,5	95,3	93,8	94,4	95,1	95,3	94,4
Population	persons	513949	511888	510920	510544	510227	510000	511114	512555	514387	515329
Estimation of total employment according ESA95	persons	235071	237842	234161	226579	233263	229339	234820	246097	245930	238931
Estimation of employees according ESA95	persons	192174	195712	192114	185823	190204	184047	193960	205786	206424	195824
Unemployment rate, LFSS	%	6,8	6,1	5,1	5,3	6,8	6,8	5,3	4,6	3,3	5,7

Notes:

1) employed in main engagement by location of workplace



CERTIFIKÁT

o absolvování workshopu pro profesionály v cestovním ruchu



Workshopy připravila Česká centrála cestovního ruchu – CzechTourism

Ing. Rostislav Vondruška
ředitel

V Praze dne 21. února 2011