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Central European Regional Policy and Human Geography

Central European Regional Policy and Human Geography is a peer-reviewed scientific publication, with an international status. The Journal is issued under the aegis of the University of Debrecen, Department of Social Geography and Regional Development Planning. The printable format (2 issues per year) is supported by the on-line version with materials published with an abstract and the full version free of charge.

The journal aims to publish relevant contributions especially in Central European regional policy and human geography nevertheless it also welcomes high quality papers from other subject areas. An important objective is to promote academic and applied research based on interdisciplinarity with a complex local and global approach.

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© Department of Social Geography and Regional Development Planning, University of Debrecen
HU ISSN 2062-8870 (Print)
HU ISSN 2062-8889 (Online)
www.cerphg.unideb.hu

C O N T E N T S

Alexander MUŠINKA – Jana KOLESÁROVÁ Situation of the Roma in Slovakia and their status in the contemporary Slovak society - Brief outline of the Roma situation and of associated problems (Art#2012-7)	7
Robert FARACIK – Miroslaw MIKA – Robert PAWLUSINSKI Social and cultural issues of the Roma minority in Poland (Art#2012-8)	15
Antal AUBERT – Mónika JÓNÁS-BERKI – Gergely MARTON Spatial organisational and management characteristics of health tourism in Hungary (Art#2012-9)	27
Jenő Zsolt FARKAS – Edit HOYK Situation of Hungarian geography in the early twenty-first century (Art#2012-10)	37
Lívia KOVÁCS Clusters - the missing item of the innovation chain? The role and position of clusters in the Great Plain Region, Hungary (Art#2012-11)	49

Central European Regional Policy and Human Geography	Year II, no. 2, 2012 , pp. 7-14.
HU ISSN 2062-8870, HU E-ISSN 2062-8889	Article no. 2012-7

SITUATION OF THE ROMA IN SLOVAKIA AND THEIR STATUS IN THE CONTEMPORARY SLOVAK SOCIETY - BRIEF OUTLINE OF THE ROMA SITUATION AND OF ASSOCIATED PROBLEMS

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Abstract: This paper pays attention to the issue of Roma minority living in Slovakia. Nowadays, the situation of this ethnic group is critical, since its members faces a number of serious problems, which impact their overall position in major society.

The aim of this paper is to give a brief outline of the Roma situation in Slovakia. We will provide information on the status of the Roma people in Slovak society over the past few years until the present. Based on the analysis of important areas of social life (social status, participation in political life, living conditions, education, housing, employment, etc.), we will summarize the Roma issue which exists as a combination of ethnic and social problems. The Roma situation will be depicted also by some statistical data on living conditions of this minority. The used statistical data are based on the first detailed national research conducted in 2004. Finally, we will also try to review the factors which hinder an effective solution of this complex and critical issue.

Key words: the Roma minority, the position of Roma in Slovakia, social status, living conditions, political participation, Roma institutions.

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POLITICAL ASPECTS OF THE ROMA SITUATION IN SLOVAKIA WITH A BRIEF HISTORICAL BACKGROUND

Describing the situation of Roma in Slovakia just in one sentence, we can say that it is bad and that it is still getting worse. But this will not give you a proper insight into this topic so let's approach to the deeper analysis. Considering the scope of this issue, however the presented analysis will be just a brief outline and not a complex and exhaustive in-depth analysis.

To understand the situation of the Roma in Slovakia we need to provide some basic (slightly historical) information. Until the year of 1989, the former Czechoslovak regime did not accept the Roma as a national minority, but approached them as the social group that "just" lived in inappropriate conditions. This group was officially called "people of the Roma origin". Their bad living conditions were perceived as a temporary state and it was belied that their change can simply occur by changing the environment in which those people lived. The fact, that this situation also has an ethic or cultural dimension, was not accepted by former regime. One of the most important reasons for this approach was the fact, that the low

socioeconomic level of significant part of the Roma population was considered to be not only economical, but also ideological problem. Widely declared social equity of the citizens and their living standard were in a sharp contrast to the level achieved by the Roma (Jurová, 1993). In the above context, therefore, it is not surprising that in the post-war period the regime was trying to change that situation only by the changing the social and material conditions of the Roma and by ignoring their cultural, ethnic, and also human needs. Some concepts and programs were applied during that period. One of the programs was aimed at damaging all of the Roma primitive settlements and spreading these inhabitants to the majority population (more: Kotvanová et al., 2003). We do not have to particularly point out that this program did not work. One of the important Slovak Romist Arne Mann described this period very accurately by addressing it as a time of deculturalization and of moral and social retardation.

After the change of the political regime in 1989, it has occurred also a change in the status of the Roma in Czechoslovakia (respectively in Slovakia) which resulted in both positives and negatives. The changes concerning the political status of the Roma in Czechoslovakia (respectively in Slovakia) can be considered as a highly positive.

Based on the resolution no. 619 from the year 1991, the Government of CSFR (Czechoslovak Federative Republic) adopted *Policy Principles of the Government of CSFR for Roma minority* on the 3rd October 1991. The central idea of these principles was the proposal to recognize the Roma as nationality equal to any other. Apart from that, some Roma joined the federal or national parliament at that time. We can mention Anna Koptová (member of National council of Slovak Republic) and three representatives of the Federal Assembly – Gejza Adam, Vincent Danihel, and Karol Seman. We have to say that this was very non-standard situation, since the government assigned only for a shorter period (1990-1992) and that time was also supplied by a great joy of post-revolutionary times. In addition, such a short period should prepare the ground for the regular democratic elections.

On the other hand, we must say that the Roma were not ready for all those social and economic changes after the year 1989, which resulted in massive job losses and significant social fall. These processes should be viewed as strongly negative ones.

However, the situation of the Roma has not changed a lot neither by accepting them as national minority. Mentioned social decline caused by the legacy of the past regime (strong paternalistic approach of the state to this group, the dependence of the Roma on the state, low educational level and associated poor position in the labour market, the demographic situation in families etc.) on one hand and a strong pressure of European structures in the pre-joining period on the other hand forced Slovak government to redefine their attitude towards the Roma.

Considerable change concerning the above situation occurred in 1995. In September of 1995, Branislav Baláž was appointed a *SR Government Representative for addressing the problems of citizens who need extra help* by regulation no.668/1995. This step did not change dominant position of the *Department of Labour, Social Affair and family* the part of which the new representative was, however it was created the first important governmental structure that should support the solving of the Roma issue, even though the Roma were still perceived in the context of broadly defined social group.

First radical changes appeared after the 1998 elections which resulted into the rise of the so-called Dzurinda's first government. This government created two major institutions, the primary concern of which was the Roma people living in Slovakia. The first of these institutions was the office of *Deputy Prime Minister for Human Rights, Minorities and Regional Development* (Pal Csaky, a representative of the Hungarian Minorities). The more important step was the cancelling of the post of *SR Government Representative for citizens who need extra help* within the *Department of*

Labour, Social Affair and Family and the consequent creation of the *Office of the Plenipotentiary of the Slovak Government for the Roma Communities*. The Roma lawyer, Vincent Danihel, became a new plenipotentiary on the 10th of February 1999.

This organisational structure is still functioning. Vincent Danihel was replaced by psychologist and activist, Klára Orgovánová, who was in function till 2007. We can say that she has the greatest impact on this office from the all representatives so far. Later on, she was replaced by Anna Batošová in 2007 and two years later Anna Batošová was again replaced by Ľudovít Galbavý. Miroslav Pollák, who became the plenipotentiary in 2010, was the first nonRoma on this position. However, he was not accepted by the most of the Roma and met their unfavourable reactions.

THE ROMA PARTICIPATION IN POLITICAL LIFE

While describing the political situation of the Roma in Slovakia, we cannot forget to mention their political participation. Unlike the other states, participation of minorities in the governing on the local, regional and national level is not guaranteed by law in SR. This can be achieved only by democratic elections. No Roma ever succeeded in the parliament elections and never become a member of National council of Slovak Republic in the past years. The last elections took exception in this context, since the Roma pedagogue - Peter Pollák has succeeded. He was elected to be a member of *National council of Slovak Republic*.

However, this does not mean, that the Roma did not try to succeed in elections before. They were appearing on the candidate lists of both major nonRoma and Roma political parties. In the recent elections, happening on 10th of March 2012, there was only one Roma political party "*Party of the Roma union in Slovakia*" applying for mandates. The leader of this party has been a businessman František Tanko. The candidate list included 32 candidates, but they were not very successful. They only gained 2891 votes (0.11%) and they were in penultimate place. There were also some other Roma candidates on the lists of other parties, but they had just a poor prospects of success. Nongovernmental activists identified 25 Roma on the candidate lists of the other parties.

There is a slightly better situation within the government on the regional and local level. In the last elections for self-governing municipalities, organized in November 2009, two Roma candidates were successful: Gejza Milko in Kosice self-governing region, and Miroslav Daňo in Presov self-governing region. The Roma became also successful in the last election to municipality bodies, held on 27th of November 2010. 30 Roma were elected and become the mayors of certain municipalities, but none of the Roma candidates was elected to be a mayor of some city in Slovakia.

Political participation of the Roma in the Slovak public life does not bring only the positives. In many cases such involvement causes more problems than solutions. Participation of the Roma in public life, especially the occupation of the town mayor positions, caused very negative reactions at the majority population. Their dissatisfaction was manifested by publishing the negative information about literacy and attained education of Roma Mayors. This was happening not only in internet discussions and various social networks and WebPages (Facebook, YouTube a pod.), but also in national and opinion-making newspapers, TVs and radio stations. On the contrary, positive information (e.g. that the newly elected mayor has a higher education than its predecessor) were very rare and sporadic or not mentioned at all.

What is more, the information about the "*buying Roma votes*" by candidates appeared in the media very often, even though, this tactic was primarily used by non-Roma candidates. This topic become so important that in some regions during the pre-election period to self-governing region bodies (November 2009), it was one of the key issue of the

pre-election fight and subsequent objections after the elections. This issue was also presented during the parliamentary elections in 2010, which resulted in to the Criminal law amendment Act valid from 1st of September 2011. Consequently such a conduct is viewed as a crime nowadays.

RADICALISM OF THE ROMA ISSUE IN SLOVAKIA

In general, we can observe a strong radicalism of Roma issue in Slovakia in the recent years. This has happened not only at the level of “folk’s ideas” but also on the political scene. Same as in other countries, various legal or semi-legal groups with anti Roma agenda have come into existence. Probably the most active is extremely radical “*Folk party Our Slovakia*”. Marián Kotleba is its leader and this party has already organized many nationalistic and anti Roma protests in the Slovak towns and villages (e.g. Sarisske Michalany, Krompachy, Presov etc.). In the last elections it received up to votes 40460 (which is 1.58%).

Of far greater concern in this context is the presence of anti Roma topics in the agendas of political parties, which has been a part of Slovak parliament for a longer time. As an example we can use nationalist party - *Slovak national party (SNS)* the leader of which is Jan Slota, or the *Slovak democratic and Christian Union (SDKU)*. The most important representatives of such ideas are Ludovít Kaník and a member of the *Nation council of SR* Štefan Kužma from Presov. Nearly in all cases their agendas are based on the arguments that the Roma minority is dominant in using generous social system of SR, the social system is misused by members of Roma minority, there is higher criminality within these groups, they build illegal buildings etc. These issues remain alive despite the fact, that the evidences show that not all of them are true. For example, according to the estimates made by *The Department of Labour, Social affairs and Family* and the *Office of the Plenipotentiary of the Slovak Government for the Roma Communities*, the Roma are just the quarter of all people who get the social welfare payments provided by a state. Also the theory, that the Roma have a lot of children so they could get social benefits from the state, is in clear contradiction to reality. Only 3% of families that get social welfare payments are families with 4 and more children.

The negative perceptions of the Roma in Slovak society are permanently strong and they are getting even worse due to economic crises. The government is aware of this phenomenon and recently it has approved the *Strategy of SR for the Roma integration up to 2020* by government resolution no. 1/2012 on 11th of January 2012. Shaping public opinion is one of the defined priorities, since different Roma population is perceived rather negatively by majority. A research conducted on this subject from 1990 shows that *social distance* in Slovakia is a wide-spread with the same intensity across the all social classes within Slovakia. The rate of social distance is rather stable and do not change over the time (researches AISA, FOCUS, GfK, Markant, MVK, ÚVVM ŠÚ). Despite the fact that the Roma community in Slovakia is not socially and ethnically homogeneous, it is perceived by the majority as a homogeneous group. We do not have to particularly emphasize that such perception is rather negative.

ROMA PUBLIC INSTITUTIONS AND ORGANISATIONS

We need to say that the Roma have established a wide range of organizations and institutions, during the last 22 years. All of them represent the Roma minority very well. The Roma have a relatively well developed network of NGOs and activists, especially at the local level. However, this minority still lacks ethnic integrating institution that would cover all of

them (e.g. as in the case of the Hungarian minority exists Csemadok, Ruthenian minority - Ruthenian Renewal, Ukrainian minority - Union of Ruthenians -Ukrainians of Slovakia etc).

Romathan, the professional Roma theatre in Kosice (director, Karol Adam), is undoubtedly one of the most important cultural institutions of the Roma minority in Slovakia. This theatre was established by the Ministry of Culture of SR in 1992 and has launched more than 50 premieres so far. Since the 1992-1993 school years, there is a *Secondary School of Arts and Conservatory* for the Roma minority (founder, Gejza Adam) in Kosice. In 2002, there was established also the *Roma Press Agency* (founder Christine Magdolénová), which is the only organization of that type in Slovakia up to these days. *Romano nevo Lil* (Roma new sheet) is the most important Roma journal in the media sector. The journal was founded in Presov in 1993 (founder is Daniela Hivešova-Šilanová, who passed away already).

On the 1st of January 2002, the Museum of Culture of the Roma living in Slovakia was founded in Martin. This museum is an integral workplace of the Slovak National Museum and Ethnography Museum in Martin. Its primary mission is the documentation of material and spiritual culture of the Roma life in the past and present. Although this is undoubtedly an important institution, in the own Roma community, it is seen rather as more or less formal act, which has just certain symbolic value.

Educational and academic institutions create a separate chapter. Despite the considerable efforts of some activists, Roma minority schools have not been established in Slovakia until the present days. Although, there are many schools and classes in which the majority of students are the Roma (often absolute), as the Roma ethnic schools are perceived only few of educational institutions. In addition to the above-mentioned *Secondary School of Arts and Conservatory* in Kosice, there are at least two other secondary schools in Slovakia, which are presented as Roma - a *Private high school of Zefyrin Jiménez Mall* in Kremnica, (head master, Ján Hero) and *Private Grammar school*, existing from 2003-2004 school year together with the *Private primary school* (existing from 2006-2007 school year). These are located on Galacticka Street in Kosice (director is Anna Koptová). ROCEPO - Roma educational centre in Presov works at Methodological and pedagogical centre in Presov (MPC) since 2001. Its primary goal is to meet the specific needs and conditions of the Roma minority. The emphasis is placed on effective education, information, documentation and consulting services especially for teachers in schools with high numbers of Roma children and students. In the academic field of higher education, there is Department of Roma Culture (Head of Department - Rastislav Rosinský) at University of Constantine the Philosopher in Nitra since 1990 and Institute of Romani Studies (head of institute Ivan Bernasovský) at Presov University since 2010.

SOCIOECONOMIC SITUATION OF THE ROMA MINORITY IN SLOVAKIA

The Roma minority in Slovakia faces a number of serious issues, which impact on their overall position in society. Perhaps the most significant problem, that we have already partially mentioned, is the social situation of the Roma community. This situation is in many cases very poor. A significant part of the Roma in Slovakia lives in marginalized Roma communities (more: Matlovičová et al., 2012), in which there are most often completely unacceptable living conditions. Here we talk about the communities with various degrees of spatial and social marginalisation. It was also recorded a high degree of concentration of the lowest social classes in these communities (so-called concentrated poverty).

In general we can say that the Roma community in Slovakia, according to various studies, repeatedly occurs among those groups, which are the most vulnerable to the poverty,

discrimination, and social exclusion. The causes for this situation can be found in combination of several bad factors – poverty associated with unemployment or with generally weak position in the labour market, (they usually occupy low-skilled and low paid jobs), poor educational situation, demographic conditions, discrimination etc.

Any solution to this situation often comes across the problem concerning the lack of quality and nationwide researches. The calls for quality and exact data, which are related to the Roma community in Slovakia, have appeared in the concept of government documents, scientific publications, and also in the society-wide discourse. During the last two decades there were implemented numbers of projects, activities and actions that had the ambition to fill this gap at least partially. However, the reality is that in most cases, these activities have had a local or specialized and more or less short-term character. Consequently, they were only very rarely systematized in the supra-regional or even national level.

The first comprehensive change in researches focused on the Roma appeared in 2003. At that year the research throughout the Slovak Republic was conducted for the first time in post-revolutionary period. This *Sociographic research of Roma communities in Slovakia* resulted in publication: *Atlas of Roma communities in Slovakia 2004* (Radičová, 2004). This research was ordered by the *Office of the Plenipotentiary of the Slovak Government for the Roma Communities* and its primary goal was to get a wide range of information for the needs of government. This study provided first comprehensive data which could be used for the quality planning of national policies in relation to the Roma communities.

The above-mentioned Atlas also allowed undertaking of some other quantitative studies, conducted by the UN Development Programme (UNDP) and World Bank. Their survey was focused on living conditions in Roma households in 2005 and subsequently in 2010 (Filadelfiová and Škobla, 2011). *Ministry of Labour, Social Affairs and Family of SR* is preparing in collaboration with UNDP in period up to 2015 additional nationwide sample survey on the evolution of the living conditions of the Roma communities called *Statistical monitoring of the welfare of selected target groups*. Atlas of Roma communities is going to be updated by the end of this year (2012).

Atlas of Roma communities 2004 mapped a total of 1087 villages and towns, in which there were identified 1575 different types of settlements inhabited by the Roma communities. This research showed that the situation in Slovak Roma communities is not acceptable. What is more, this situation is getting worse along with the rising degree of separation or segregation. According to the selective UNDP survey in 2010, more than a half of all Roma households was living in the separate brick houses and 21% of the total households was living in the apartments. 16% of the Roma households were living in non-standard forms of dwellings (10% in primitive shelters and 5% in wooden houses or in other non-standard type of dwelling).

According to the Atlas, 39% of dwellings in Roma settlements are connected to a water supply. This was confirmed also by the UNDP survey data from 2010. The results pointed at large differences in access to drinking water compared to the majority population. At the time of the research, less than a half of Roma households were supplied by public water supplies and water sources outside their own homes were used by one quarter of Roma households. The situation concerning the access to electricity is much better (almost 90% of dwellings has access to electricity).

This survey confirmed also some of the demographic characteristics of the Roma community. The pre-productive age group includes 44% of the total Roma population (while 19% were children under 6 years and 25% were young adults up to 25 years). The share of population on the post-productive age (pensioners) was very low and reached only 5%. The remaining 51% were economically active (working and unemployed) and economically inactive members of this minority. Although the reproductive behaviour of the

Roma population demonstrates some differences compared to the majority (higher birth rates, lower life expectancy, earlier start of reproductive activity and a longer reproductive period), survey data show that the demographic behaviour of Roma population follows a behaviour pattern of the majority from a long-term perspective, however with a certain time delay which is equal to the social status of individual communities (more information: Vaňo, 2002).

It prevails a high unemployment rate within the Roma in Slovakia (as well as long-term unemployment). The sample surveys of UNDP and of the World Bank demonstrate that there is unemployment rate of about 70% and employment rate does not exceed 20%. Even these facts have confirmed that the situation in segregated communities is getting worse and that it is significantly worse for women.

Considerably alarming is the situation in educational attainment. Due to the fact that educational attainment is a major limiting factor in applying to the labour market, it is very unlikely that this community will achieve positive change without external interventions in the near future. Up to 48% have completed only primary education and 17% of Roma in Slovakia do not have at all or have not completed the primary education. Only 24% of the Roma continue in secondary education. Secondary education is completed only by 16%; moreover, just 2% end the secondary school with school-leaving exam. The percentage of the Roma with University degree is statistically unimportant (although their number is growing). A truly alarming is that as much as 4% of Roma children complete special schools, i.e. schools designed for mentally or physically handicapped students or students with behaviour disorders.

A similar unfavourable situation is also observed in other areas (health, crime, migration, economic literacy, etc.); however, the calculation of these data would greatly exceed the possibilities of this paper.

CONCLUSIONS

Provided insight into the Roma issue showed that the situation of this minority is more than alarming and it is getting even worse. It is generally approved that nowadays critical situation has arisen as a result of the accepted communist regime politics, which disrupted many of natural links in society. The regime was trying to change the situation of the Roma, however in the way, which had contra productive impact and the social decline has deepened after the fall of regime in 1989.

Nowadays, the most problematic group of the Roma minority are those living in marginalized settlements on the edges of towns. Despite the central European position of the state, the Roma settlements resemble third world slums confronted by poverty, high unemployment rate, exploitation, violence, drug use and resignation. Living in such conditions causes additional exclusion from main stream society and its social networks, the deterioration of access to public services or the reduction of their quality, deterioration of health, and usually also the acceptance of life strategies characteristic for socially isolated and extremely poor communities. According to sociographic mapping of Roma communities (2003-2004), approximately 60% of 320 thousands Roma people live diffused through the majority population. The remaining 40% live in ethnically homogenous poor settlements under the poor living conditions.

Social status of the Roma minority is commonly very low in Slovakia. Actually, the above mentioned critical issues impact on their overall position in society. The Roma are being excluded from institution, public affairs, education, labour market, political scene and other social areas, where they have just slight participation.

Political interest in addressing the Roma issue in Slovakia is generally insufficient. Increased action by public authorities was observed during pre-joining period to EU. Because of the strong pressure of European structures the Slovak government was forced to redefine their attitude towards the Roma. In the recent year, the important step was for example the establishment of *the Office of the Plenipotentiary of the Slovak Government for the Roma Communities*, which has helped to approach the issue more effectively.

However, political authorities still do not deal with a topic in depth, which prevents successful solutions. In addition, involvement of the Roma and increased sense of responsibility among the Roma are also required in order to meet positive changes. The challenge remains also more detailed researches which would cover missing data and flawing could help at effective policy planning and strategy implementation.

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Central European Regional Policy and Human Geography	Year II, no. 2, 2012 , pp. 15-26.
HU ISSN 2062-8870, HU E-ISSN 2062-8889	Article no. 2012-8

SOCIAL AND CULTURAL ISSUES OF THE ROMA MINORITY IN POLAND

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Abstract: Roma are one of ethnic groups in Poland. The Roma population is estimated to be between 16 thousand and 30 thousand. As it is the case in other countries in Central and Eastern Europe, the process of assimilation of the Roma minority into Polish society is limited. Roma are a social group that is particularly exposed to social discrimination and social exclusion. The authors of the study take up major social and cultural issues related to living conditions of the Roma minority in Poland and they indicate measures implemented at national level in order to improve living conditions of this ethnic group.

Keywords: ethnic minorities in Poland, Roma, social exclusion

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INTRODUCTION

Roma represent a distinct ethnic group, which resides on Polish lands since the fifteenth century and is deeply rooted in the structure of Polish ethnicity. Despite a long period of co-existence with Polish people, Roma have retained a strong sense of cultural identity manifested in their own language (Romani), traditions, customs, lifestyle and family relationships (Ficowski, 1985). The process of their assimilation into Polish society is still limited. Roma are a social group particularly exposed to discrimination and social exclusion (Szymanczak, 2011). Remaining on the margins of Polish society, the Roma community has not reached a comparable level of civilisation development. Significant social problems faced by the Roma in Poland include the very low level of education, lack of professional qualifications and the extremely high unemployment rate (Soja and Zborowski, 2012).

The issue of national minorities in Poland was marginalized during the communist era, which was the result of the widespread conviction of the ethnic homogeneity of the country. Only after the political transition in 1989, more attention was paid to the active

participation of national and ethnic minorities in the social, political and cultural life of the country. Since the 1990s, more active measures have been implemented in order to support the Roma minority, especially to improve the quality of life of this ethnic group. In order to achieve this goal, a government programme for the Roma community was introduced in 2001, implemented to the present day. There are also other programs financed by European Union funds. Also, in the last thirty years the research on the Roma people, their culture, customs, social situation and living conditions has been intensified.

The purpose of this article is to discuss major social and cultural problems of the Roma minority in Poland. The authors used programmes, reports and other studies on the situation of Roma compiled for the Ministry of the Interior, census data from 2011 and 2002, government programmes for the Roma community as well as reports and results of research carried out by social organizations and the scientific community.

ROMA AMONG OTHER ETHNIC MINORITIES IN POLAND

In contrast to most European countries, Poland is a relatively homogeneous country in terms of ethnicity and nationality. Since the Second World War, national and ethnic minorities are a small percentage of the country's population. According to the most recent general census of 2011, the share of minorities in total Polish population does not exceed 4% (Table 1). Of the 1.4 million people who declared ethnicity or nationality other than Polish in the census as much as 60% indicated Polish as their second identity. Therefore, only 562 thousand people, i.e. 1.46% of the Polish population considered themselves to be not Polish and did not directly indicate that they are part of the Polish nation.

The Polish law of 2005 clearly defines what kind of group can be regarded as a national minority or ethnic minority and exhaustively lists the ethnic groups and nationalities that fulfill these conditions.

A national minority under Polish law (the Act on National and Ethnic Minorities and Regional Language, 2005) is defined as a nationality group, which meets all of the following six conditions: 1) is smaller in number than the rest of the Polish population; 2) its language, culture or tradition is significantly different; 3) seeks to preserve its language, culture or tradition; 4) is aware of its own historical and national community and wants to express and protect it; 5) the ancestors have been inhabiting for at least 100 years the current Polish territory; 6) it identifies with another nation that is organised in its own state.

While an ethnic minority is a group of people which is characterized by the following: 1) is smaller in number than the rest of the Polish population; 2) its language, culture or tradition is significantly different; 3) seeks to preserve its language, culture or tradition; 4) is aware of its own historical and ethnic community and wants to express and protect it; 5) the ancestors have been inhabiting years the current Polish territory for at least 100 years; 6) it does not identify with another nation that is organised in its own state.

The above conditions are met by nine national groups (Belarusian, Czech, Lithuanian, German, Armenian, Russian, Slovak, Ukrainian and Jewish) as well as 4 ethnic groups (Karaim, Lemko, Roma and Tartars).

The results of the Census of 2011 showed the identification of new ethnic groups and nationalities in Poland that still do not have a specific formal legal status. The largest ethnic minority are the Silesians living in southern Poland (mainly voivodeships: Silesian, Opole and partly Lower Silesian) and the Kashubians, living in the northern part of the country (Pomeranian Voivodeship). According to the Census of 2011, 817 thousand people considered themselves Silesians (2.12% of the total Polish population), and 423 thousand considered themselves Kashubians (1.1%). Among the legally recognized ethnic groups, the largest community are the Roma (16 thousand people) and Lemkos (about 10 thousand people)

(Census 2011). Among the national minorities, the largest in number are: the German (126 thousand), Ukrainian (49 thousand) and Belarusian (46 thousand).

Table 1 National and ethnic minorities in Poland

Declared national or ethnic identity	2002	2011	
		Total	Including the identity declared jointly with the Polish identity
National minorities (in thousand)			
German	152.9	126.0	58.0
Ukrainian	31.0	49.0	20.0
Belarusian	48.7	46.0	15.0
American	1.5	11.0	10.0
Russian	6.1	13.0	7.0
English	0.8	9.0	8.0
Italian	1.4	8.0	7.0
Lithuanian	5.8	8.0	3.0
French	1.6	7.0	6.0
Jewish	1.1	7.0	5.0
Vietnamese	1.8	4.0	1.0
Spanish	0.2	4.0	3.0
Dutch	0.5	3.0	3.0
Greek	1.4	3.0	3.0
Armenian	1.1	3.0	1.0
Czech	0.8	3.0	2.0
Slovak	2.0	3.0	1.0
Ethnic minorities (in thousand)			
Silesian	173.2	817.0	423.0
Kashubian	5.1	229.0	213.0
Roma	12.7	16.0	7.0
Lemko	5.9	10.0	4.0

Data source: Census 2011, Census 2002.

Compared to other states of Central and Eastern Europe, the Roma in Poland constitute a small group (from 0.04 to 0.08% of Polish population). Their number is estimated to be between 16 thousand (data from the Census of 2011) and 30 thousand (data presented by Roma organizations). These discrepancies arise for many reasons, such as the methodology of data collection or the reluctance of the Roma themselves to declare their ethnicity to the authorities because they generally do not feel such need. Many Roma identify themselves with their country of residence and they declare their nationality to be Polish. The estimated number of about 30 thousand of Roma people is mainly based on data declared by Roma organizations and on research by scientists, who identify the Roma people based on the linguistic criterion. Difficulties in determining the precise number of Roma groups are reflected in the data presented in Table 2. The source of information in this case was the assessment by local authorities carried out in 2002. If we compare this with the declaration of the Roma themselves during the Census of 2002, it appears that the size of this community differs by more than 8 thousand people.

The Roma people in Poland are ethnically diverse due to the Romani dialect they use, customs and traditions, the internal organization of the community, as well as the period in which they arrived to Polish lands and the place from which they originated (Ficowski, 1985). There are four main groups within the Roma community in Poland. Here belong:

- Polska Roma, whose ancestors between the sixteenth and eighteenth centuries fled to Poland from persecution in the German states.
- Carpathian Roma (also called Polish Highlander Roma or Bergitka Roma) have been arriving in Poland since the fifteenth century, wandering along the Carpathian arc from Wallachia, Hungary, Slovakia.
- Kalderash (Kelderari, Kalderasha, Tinkers) have been arriving since the 1860's to the Polish lands from the area of present-day Romania. Main profession of the Kalderash was boiler-making.
- Lovari (Lovara) appeared in Poland together with Kalderashi migrating from the areas of present-day Romania and Hungary. Their traditional occupation was horse- and textiles-trading.

Roma, in contrast to other ethnic groups in Poland are characterized by a relatively strong reluctance to assimilate with the Polish nation. According to the traditional code of the Roma - the *Romanipen* - the Roma community should be based on legal and moral self-management and self-sufficiency, and should not let any strangers interfere with Roma affairs.

One of the basic characteristics of *Romanipen* is patriarchy: – a man – the head of the family is subordinate to the leader and the elders of the kin. They all make sure the *Romanipen* rules are observed. Acting against these rules is perceived as defilement (*mageripen*). According to the tradition, the Roma origin should be manifested as it is of the utmost value. Other Roma people should be spoken to only in the Romani language. Moreover, solidarity, help and observing both ceremonies and rituals are obligatory. The law also regulates permissions to practice particular professions or to earn a living. The traditional professions are: coppersmithing, smithery, horse trade, music performance and fortune-telling (*kabala*). There are also professions forbidden by the Roma tradition which is a serious obstacle to adjusting to the demands of the modern world. According to the narrowly-interpreted rules of *Romanipen*, children's education is also limited. However, efforts made by educated Roma elites to break those deeply-rooted beliefs need to be emphasised. Despite being divided into many groups, diverse in terms of tradition, history, religion or lifestyle, there are several uniting elements to the Roma people, no matter where they live. These are: superiority of custom law, patriarchy and great authority of elder people (Kowarska, 2005; Nowicka, 2003; Paleczny, 2003).

Roma do not have their own religion, which for many ethnic or national groups in Poland is a distinguishing mark, like for Belarusians, Ukrainians, Russians, Armenians and Jews. Roma usually took over the religion of neighbouring population. In Poland, most of the Roma are followers of the Roman Catholic Church. Their religiosity is manifested in the tradition of Roma pilgrimage to Jasna Gora (annually since 1981), to the shrine in Limanowa in Lesser Poland or in Rychwald in Kujawy region. There are also followers of other religions among the Roma, but this group is relatively small. It includes followers of the Orthodox Church, Pentecostal Church and Jehovah's Witnesses (Szymanczak, 2011).

Until the 1960s, the majority of Roma in Poland led a nomadic life. In 1964, during the so-called productivity and settlement programme, Roma were forced to give up their nomadic life and to settle down, mostly in cities. Settled life was characteristic only of the Carpathian Roma who have lived in the Polish Carpathians for centuries. However, even some of them were forced to resettle for example to Nowa Huta (Krakow), where they were employed at the construction of the metallurgical plant. Currently, the Roma population is spread across the country and does not form any large areas of concentration. Most of the

Roma people (over 90%) live in urban areas, with their number never exceeding 500 people (for example: Wrocław - 467 people, Mielec - 349, Łódź - 330, Nowy Sącz - 306, Kraków - 264) (Soja and Zborowski, 2012). Roma live in settlements located outside the city centre, isolated from other built-up areas. With regard to the territorial division of the country, most Roma live in the Lesser Poland, Lower Silesian and Silesian voivodeships (Table 2).

Table 2 Spatial distribution of the Roma in Poland in 2002, based on estimates of voivodeship offices

Voivodeship	Number of people	Share in %
Lower Silesia	2500	12.0%
Pomeranian	1400	6.7%
Lublin	800	3.9%
Lubuskie	700	3.4%
Łódź	1200	5.8%
Lesser Poland	3500	16.9%
Masovian	1600	7.7%
Opole	800	3.9%
Podkarpackie	1500	7.2%
Podlaskie	700	3.4%
Pomeranian	500	2.4%
Silesian	2300	11.1%
Świętokrzyskie	650	3.1%
Warmian-Masurian	1000	4.8%
Greater Poland	600	2.9%
West Pomeranian	1000	4.8%
Total:	20,750	100.0%

Data source: Ministry of Interior and Administration.

The Roma population if compared to the Polish population as a whole is distinguished by a young demographic profile. Children and the youth constitute over 36% of their total population (over 23% in Poland), whereas the elderly constitute only 4.5%, which is three times less than the country's average (2002). Life expectancy (55–60 years) is shorter by 10–20 years than the European average. In terms of the sex ratio, men are the predominant sex (over 50%) (Soja and Zborowski, 2012). The Roma families are multi-children families, often there are 5–6 children born to the same family. Although contracting a marriage at a very young age is one of characteristic features of the Roma, more than half of them are unmarried. Contracting a marriage in the Romani culture is conducted in a very traditional way, observing the culture principle of entering into a marriage within one's own group in order to protect it against the loss of members, but also to strengthen isolation and maintain the state of separateness (endogamy).

THE SOCIAL SITUATION OF THE ROMA MINORITY - MAJOR PROBLEMS

According to experts on Roma issues, the most important social problems of this ethnic group in Poland include: difficult living conditions, high unemployment, lack of education, the still existing tendency of the Polish society to discriminate the Roma as well as Roma reluctance to take active part in the and political life of the country.

The social situation, living conditions and unemployment

Most of the Roma population live below the poverty line. Only a small part of them is distinguished by wealth or earn their own living. According to Szymanczak (2011), the primary sources of income of the Roma are commercial activities conducted in the shadow economy, support by families living abroad, funds obtained from a variety of assistance programs, social assistance and support by charitable institutions. It is relatively rare that Roma receive retirement benefits. Among all Romani people, the poorest group are the Carpathian Roma. About 75% of them live on social assistance.

Unemployment is common in the Roma community. It is estimated that the unemployment rate among Roma is three times higher than the average for the country and it is over 31% (Soja and Zborowski, 2012). It should be noted that the Roma was the first social group in Poland to be very strongly affected by the process of economic transformation at the turn of the 1980s and 1990s. After socialist state-owned enterprises have been privatised, most of the Roma who had got their jobs there at the socialist time (during the so-called professionalisation programme) were the first to be dismissed because of their low skills. Today, many Roma live from day to day, without permanent employment. Only 8% of the Roma are formally employed. They usually take a job in black economy or receive income by begging, often with children. The Roma community is still dominated by the belief that the Roma only work when they have to. The difficulties of the Roma in the labour market are due to shortcomings in their education, poor command of the Polish language, and partly due to the reluctance of employers to hire Roma. Only a small group of Roma has great skills in business. Roma, who were in the past engaged in horse-trade or appliances trade, now live on importing cars, trade of textiles or antiques etc. Some run registered businesses, mainly services (shops, food catering establishments, petrol stations).

Roma, apart from isolated cases, live in difficult financial conditions. They occupy small living quarters in poor or very poor technical state, they often do not have basic amenities like running water, toilets, etc. Due to their multi-generations family life, there are many cases when a 10-person family lives in a one room apartment. This is especially true of the Carpathian Roma living conditions because among them the poverty and backwardness levels are the highest. An important obstacle to improving their living conditions is often the lack of regulated ownership rights to the building in which they live, which limits the possibility of expansion or renovation. Most of the Roma live in municipal buildings. It is common for the Roma to not pay the rent and media fees, which means that the owners (or managers) of the buildings do not have the means to carry out the necessary repairs, and thus the vicious circle is closed. Some municipalities have introduced pilot programmes, such as the "Gypsies work for their debt" in the municipality of Glubczyce (Opole Voivodeship). Such programmes give them the opportunity to work off the debt arising from using an apartment by taking the work commissioned by the municipality (Kopycinski, 2007). This form of employment allows the Roma to obtain additional remuneration, and it is an opportunity for stimulation of their career.

Poor technical condition of housing, lack of access to basic media, and poor diet create unfavourable conditions for maintaining good health among the Roma. Roma, more often than other people, face the problem of difficulty in accessing medical care. In some places, there are cases of rare diseases, like tuberculosis.

Education

An important factor affecting the difficult social situation of the Roma is the low level of education of most of them and the lack of professional qualifications. One of the main problems is the poor command of the Polish language, which significantly impedes their participation in the labour market. In Poland, 40% of Roma have only elementary education and a further 50% - incomplete elementary education. Higher level of education is gained by only a few - about 10% of the Roma community, and university education by only 0.2% of the Roma (Soja and Zborowski, 2012). In the older generation, illiteracy is widespread.

About 70% of Roma children attend the compulsory school. The attendance of students is low. Children often accompany their parents in their professional activity, which implies the necessity to travel. One of the forms of economic activity among Roma is hawking (street vending). In the case of girls, a significant barrier to education is the relatively early marriage at the age of 13-16 years. After getting married most women do not return to school. Children are also deterred from school by the still present unfriendliness of their non-Romani peers. Lack of strong motivation to graduate from school among Roma pupils and the lack of parents' support causes that many of them abandon school at an early age.

Roma children can attend school in the so-called integration classes or in Roma classes. Special Roma classes emerged in the late 1980s as a way to overcome adaptation barriers. The education model for Roma children is still the subject of dispute and discussion (Szymanczak, 2011). The leaders of the Roma community opt for integration classes, regarding Roma classes as something like a "ghetto school". Many parents, however, believe that Roma classes are better for their children than integration classes, in which children can be humiliated by their non-Roma peers. Currently there are several Roma classes in Poland, most of them in the Lesser Poland Voivodeship. Learning there are children and young people of different ages and different levels of education. Often teenagers learn to read and write together with children aged 7-8. The level of education in the Roma classes is very low. One of the often cited reasons for the low interest in learning among Roma children and for their learning difficulties is the lack of kindergarten education. The majority of Roma children start their formal education only at the age of 7 years, not having attended kindergartens or the reception class (called "zero grade") at school. This situation is largely the result of lack of financial resources among the Roma to cover the costs of kindergarten education. Later, there are further financial constraints that prevent access to teaching materials, such as books, as well as obstacles resulting from living conditions, such as lack of space for learning in overcrowded apartments.

Social exclusion and relations with others

Isolation from the outside world is a common phenomenon among Roma. Roma experienced centuries of persecution on ethnic grounds and therefore they have developed a number of defence mechanisms, which today form a significant barrier to establishing extensive contacts between neighbouring communities. The code of conduct of the Roma, based on the traditional system of values, implies that they should not fraternise with *gadjos*, i.e. strangers. Maintaining relationships, including marriages with members of other ethnic groups of Roma is also considered impure. As a result, this leads to indifference or even avoiding their neighbours. In Romani culture there is a belief that the world of strangers (*gadjos*) is the worse world. This unusual for other ethnic groups in Poland isolation attitude of the Roma raises similar attitudes in Polish society, which does not know the Roma, has no knowledge of their world, and therefore treats the Roma as strangers. When combined with the ever present in the minds of Poles stereotype of a Roma person as a person engaged in theft, this can easily lead to the perception of Roma by the Polish people as a threat. In Poland, ethnic tensions between Roma and Poles were never very strong, but in the late 1980s and 1990s, a few conflicts situations arose, for example in Auschwitz in 1981, in Mława

in 1990. Currently they are rare, which is confirmed by the data of the Police Headquarters. But the negative stereotype of Roma still prevails. A CBOS survey in 2008 showed that as many as 42% of respondents believe that the Roma have a natural predisposition to commit crimes. If speaking of mutual relations, another area of tension should be mentioned. It was identified with regard to the implementation of financial assistance for Roma by local authorities and the Polish state. In some people's opinion, this support creates a sense of injustice among other poor social groups to which the state does not address specific aid programmes.

Roma difficulties in relations with strangers, and the passivity of the Roma themselves, including the lack of cooperation causes them to remain on the margins of social life of the country. At this point it is worth noting that Roma avoid any interactions with some of state institutions, such as the police. Any discords among them are settled on the basis of their own code of conduct. The organizational and legal system of the country in which they live remains incomprehensible to them. For a long time, Roma had not formed any countrywide social organization, which would represent their interests. Their incomprehension of the outside world makes them want to avoid contact rather than cooperate. Only in recent years, a number of Roma organizations emerged, mostly local. They take up issues that are important from the point of view of the Roma minority. In 1997, the Central Council of Roma has been founded - it is a forum for the cooperation of leaders of local Roma communities, representing various local organizations. Another countrywide institution is the Association of Roma in Poland. Roma relatively rarely engage in political life, they have no representation in the parliament.

ROMA CULTURE AND ITS POPULARISATION

Roma, having a distinct culture, on the one hand still trigger in the Polish society various concerns, often groundless and based on stereotypes, but on the other hand they raise curiosity and desire to learn about the history and culture of this ethnic group. Roma culture can be an important element in the process of integration of this ethnic group with Polish society. There have been actions undertaken in this area for years, but their effects are still insignificant. This is due to many reasons, including the unfavourable attitude of traditional Roma communities, for which protecting Roma traditions and customs from Gadjos (non-Roma people) is an important part of their identity. An essential identity element of the Roma people is their language - Romani that developed for centuries without a written form. Despite the fact that in the 1990s, at the World Congress of Roma, international standards of written Romani language and a common alphabet for all dialects of Romani have been established, in some Roma communities there is still a negative attitude towards publications in their native language and even towards the idea of introducing the language to schools (Szymanczak, 2011). The written word is considered by traditional Roma to be dangerous as it significantly violates traditions and gives access to strangers (non-Roma) to the secrets of the world of the Roma. The first books in the Romani language in Poland were published in the early 1990s. Today, Roma intellectuals are trying to increase the importance of the written word in the culture and daily life of the Roma.

For most Poles, Roma culture is usually associated with folklore, especially with music. Roma music has been highly appreciated by Polish society for centuries. Roma musicians are often present during important events, and reference to their music can be found in the most important works of Polish literature (e.g. in "Pan Tadeusz" by A. Mickiewicz). Music is the element that breaks down stereotypes and bounds together the two communities. This goal is accomplished especially during Roma culture festivals that are held in many places, such as Gorzow Wielkopolski - International Meetings of Roma Groups

Romane Dyvesa, Ciecchocinek - International Festival of Roma Songs and Music and Poznan - World Meetings with Roma Music.

Exhibitions in museums all over the country contribute to promoting of Roma culture.

In 1979, the Regional Museum in Tarnow organised the first exhibition in Poland devoted to Gypsy people, called 'Gypsies in Polish culture'. It was also the first exhibition devoted to national and ethnic minorities living in Poland. This huge exhibition, for the purpose of which exhibits from many different museums and other institutions as well as from private collections were rented, has initiated the idea of collecting material traces of the Roma culture. As a consequence, a Roma section was opened in the Tarnow museum, which in 1990 was transformed into Ethnographic Museum as a department of the Regional Museum in Tarnow (Bartosz, 1982; Bartosz, 1998).

Other museums that deserve noticing are the Regional Museum in Gorzow Wielkopolski, which collects Gypsy costumes since 1977 (the collection was started by the costumes given to the museum by the 'Terno' group) and the Museum of Folk Architecture in Olsztynek, where a Gypsy residential cart can be seen. The Roma Holocaust was documented by a large permanent exhibition in the Auschwitz-Birkenau State Museum.

Roma issues presented on the radio and television

In 1991, TVP Krakow presented a broadcast entitled *U siebie* ('At home'), showing life and cultural achievements of minorities living in Poland. In 2002, TVP Krakow started the realisation of a bilingual television programme *Informator Romski - Romano Ciacipe*. In the same year, a series of programmes 'Etniczne klimaty' ('Ethnic atmosphere') was broadcast as a reference to the *U siebie* show. Also other regional departments of TVP produced programmes related to the Roma subject – for example 'My Romowie' ('We Roma People') in Bialystok. In 2010, the Polish Roma Association together with Telewizja Zachod ('TV West') in Szczecinek prepared a fifteen-minute long programme *Romano Sveto* presented once in a month. Furthermore, Polskie Radio Koszalin (Polish Radio Koszalin) has been broadcast the *Romano dzipen* (Roma life) since 2005.

Publications on the cultural heritage of the Roma

The oldest Roma magazine in the Polish publishing market is the *Rrom P-O Drom*, published monthly by the Central Council of Roma in Bialystok. Since 1995, the *Dialog-Pheniben* has been coming out, published by the Roma People Association in Poland, originally as a quarterly-, currently as a monthly journal. *Romano Atmo* is a bimonthly publication released since 2006 by the Polish Roma Association in Szczecinek. The above-mentioned journals discuss the most significant issues and problems of the Roma community (both in the country and abroad). The articles concern the broadly understood Roma culture, including music, film and literature as well as present interviews with people, important for this community. Some of the articles are translated into the Romani language. There are also poems and prose, published in Roma.

Intensification of activities aimed at popularising the cultural heritage of the Roma is largely dependent on financial support from external funding. Direct grants from the Ministry of Culture and the Ministry of Interior are of great importance in this respect. Also local governments at the level of voivodeships and municipalities as well as a growing number of social organizations, domestic and foreign are involved in bearing the cost of this activity. These measures, however, still do not meet existing needs. For example, funds allocated by the Ministry of Culture in 2010 for the support of the Roma minority amounted to 500,000 PLN and accounted for 4% of the total funds allocated in the same year for the support of all ethnic groups and nationalities.

MAIN ASSISTANCE PROGRAMS SUPPORTING THE ROMA MINORITY

Roma issues became the subject of interest of the Polish authorities at the beginning of the 1990s. Activities in this area were intensified at the beginning of the twenty-first century, when the government enacted programmes addressed directly to the minority group. The first one was the *Pilot programme for the Roma community in the Lesser Poland Voivodeship for the years 2001-2003* (Pilotazowy, 2001). Basing on this programme, another government programme has been developed in 2004 for the Roma community in Poland. This programme covered the entire country for the years 2004-2013. In recent years, EU programmes have taken on great importance, such as the Human Capital Operational Programme.

The programme for the Roma community in Poland for the years 2004-2013

The government programme for the Roma community in Poland for the years 2004-2013 (Program, 2004) is comprehensive and covers a wide range of tasks relevant to the Roma community, including tasks in the area of education, improvement of the economic and social situation, health, combating unemployment, security, culture, dissemination of knowledge of the Roma community and civic education of the Roma. The programme is addressed to a wide range of beneficiaries. The participants can be local authorities, associations, foundations, research institutions (universities), churches and religious associations and other entities. The Ministry of Interior is responsible for coordination of the activities. The programme budget for every year is 10 million PLN. An additional 1 million for this purpose is provided by the Ministry of National Education and the Ministry of Interior. Units of local government wishing to participate in the programme must contribute at least 20% of the total amount of the grant from their own budgets (Table 3).

Table 3 The structure of planned expenditure under the Programme for the Roma community in Poland in the years 2004-2013

Field	The planned amount in a given year (in PLN)	Share in %
Education	3,600,000	36%
Roma and civil society	300,000	3%
Combating unemployment	700,000	7%
Health	700,000	7%
Living conditions	3,600,000	36%
Safety, prevention of crimes committed on ethnic grounds	300,000	3%
Preservation of culture and ethnic identity of the Roma	500,000	5%
Knowledge of the Roma community	300,000	3%
Together	10,000,000	100%

Source: Ministry of Interior and Administration.

The main areas of work under the Programme for the Roma community in Poland for the years 2004-2013 are education and improvement of living conditions. These two areas receive more than 70% of the total funds for the implementation of the program.

In the field of education, the programme was aimed at creating integration classes to replace the so-called Roma classes. It is understood that the final education model of Roma

will be based on cooperation between teachers of different subjects and the so called supporting teacher as well as the so called Roma assistant. The supporting teacher's tasks are to supervise children's current progress in learning, to teach in compensatory courses as well as to control students' attendance and learning progress. And the Roma assistant is a person originating from the Roma environment, enjoying their trust. Roma assistant's tasks are to help students in their contacts with the entire school environment, to create a positive image of school in Roma children's minds, to provide emotional support, to develop appropriate relations between students' parents and the school, to inform parents about the learning progress and to mediate in difficult situations and conflicts. The programme in the area of education also provides large financial support of the educational process (for example subventions for children's kindergarten attendance, purchasing teaching aids and textbooks, funding students' transport to schools, financing compensatory activities), scholarship support for the most talented (including scholarships at universities) and financing after-school activities (supporting children in development of their artistic skills, or organizing summer and winter recreation for children).

The programme regarding the improvement of living conditions is primarily focusing on investment activities aimed at improving the technical and sanitary state of residential buildings. The plan includes, among other things, disbursement of funds for the construction of social housing, renovation of existing buildings, purchase of land for the construction of single-family dwellings, supplying media such as drinking water system, sewerage system, electricity.

The programme for the Roma community in Poland has been subordinated to the realization of a long-term goal, which is the full participation of the Roma people in the life of the civil society. The programme is not intended for emergency financial assistance. Out of all competing projects, mainly those ones which are aimed at achieving this strategic objective will be considered. The programme for the Roma community in Poland will also continue after 2013.

Roma component in EU programs

An important instrument of financial support for the Roma is also the Human Capital Operational Programme for the years 2007-2013, financed by the European Union. A Roma component has been included in this programme - the so called Projects for the Roma community. Implementation of this EU-funded "Roma component" should be consistent with the implementation of the government *Programme for the Roma community in Poland*. Therefore, the range of tasks carried out in the framework of the "Roma component" includes projects on education (priority projects), employment, social inclusion, health, activation in the area of civil society and the dissemination of knowledge of the Roma community. The budget for each year of the programme is 12 million PLN.

CONCLUSION

Roma issues are the most important in the Polish government policy towards minority groups and will prevail in this sphere of government activity still for a long time. The financial status and living conditions of Polish Roma are still significantly different from Western European standards and the average Polish standards. Roma are treated as a foreign social group, although they have coexisted with the Polish society for centuries. In the Polish society the stereotype of the Gypsy thief is still lingering.

Present actions addressing the Roma issues create an opportunity to improve their living conditions and increase their participation in the life of the civil society. However, we must remember that this is a long-term process. It must be based on civilisation changes.

Only an educated Roma society will be able to combine their traditions and culture with their co-existence within the civil society in Poland. A higher level of education will likely improve their chances in the labour market and change their image in the minds of Poles. The educational policy towards the Roma does not imply and can never imply any attempts to make them give up their own traditions and values. Changes in the Roma community will largely depend on themselves. In this respect, the leaders of the Roma community play an important role, being the only ones who can change attitudes of the Roma people.

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Central European Regional Policy and Human Geography	Year II, no. 2, 2012 , pp. 27-36.
HU ISSN 2062-8870, HU E-ISSN 2062-8889	Article no. 2012-9

SPATIAL ORGANISATIONAL AND MANAGEMENT CHARACTERISTICS OF HEALTH TOURISM IN HUNGARY

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Abstract: Geographical position, attraction potential and the characteristics of the socio-economic environment result in the birth of various touristic spatial types. Health tourism, the leading tourism product of Hungary, has a peculiar spatial organising power. The complex expectations about this product demand the creation of a complex supply structure. The financial power and the capital absorption capacity of a respective region have a much bigger impact on health tourism than on any other spatial types. Health tourism centres, the leading destinations of Hungary in addition to the capital city, Budapest, have reached a higher level in several fields of the operation of the TDM system. The characteristics of health tourism, as a type of tourism product, have an impact of the management system, which leads to the birth of a specific structure in the locations examined. Our paper, in addition to the introduction of the characteristics of this spatial type and the examination of the relationship system of the range of the spas and the settlement hierarchy, is an overview of the characteristic features of TDM organisations. The methodological basis for the preparation of the paper is, in addition to secondary information and documents, a primary research. We carried out the examination of the characteristic features of TDM organisations by a questionnaire survey, and destinations of unquestionable and clear health tourism profile were involved in the examination.

Key words: health tourism, destination, TDM, destination management

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INTRODUCTION

Geographical position, attraction potential and the characteristics of the socio-economic environment result in the birth of various touristic spatial types. Health tourism, the leading tourism product of Hungary, has a peculiar spatial organising power. The complex expectations against this product demand the creation of a complex supply structure. The financial power and the capital absorption capacity of a respective region have a much bigger impact on health tourism than on other spatial types. A dominant element of health tourism as a spatial type is

strong concentration. The demand for large amounts of investment capital results in developments in single specific settlements that stand out from their environment after the investment. The extremely strong core area – which is basically a settlement or two – is only joined by small number of settlements. Touristic infra- and suprastructure thus has a high concentration. The basic endowment, the natural medical factor is a strong location factor in itself, to which spas and accommodations are directly related. Parallel to the improvement of the quality of the accommodations, however, further elements of supply find difficulty in surviving on the market (e.g. catering industry). The peculiarities of the supply structure are also reflected in the creation and operation of the tourism destination management (hereinafter: TDM) organisations.

Our paper, in addition to the introduction of the characteristics of this spatial type and the examination of the relationship system of the range of the spas and the settlement hierarchy, is an overview of the characteristic features of TDM organisations.

The methodological basis for the writing of the paper is, in addition to secondary information and documents, a primary research. We made the examination of the characteristic features of TDM organisations by a questionnaire survey, and destinations of unquestionable and clear health touristic profile were involved in the examination.

THEORETICAL FRAMEWORKS – TDM AND HEALTH TOURISM

During the theoretical foundation of the paper we thought it was important to summarise the characteristics of *general tourism destination management* and *health tourism*. We need this double approach to highlight the correlations and promote the exploration and understanding of the special features of tourism destination management in the case of health tourism destinations.

Development frameworks and dilemmas of health tourism

Health tourism, according to the definition accepted by the Hungarian National Tourism Authority and the Ministry of Health and put down in the Second National Development Plan of Hungary, is that specific sector of tourism where the main motivation of the tourists is the improvement and/or preservation of their health conditions, which also means the use of health care and wellness services. In Hungary the most important representatives of health tourism centres are service providers built on medical and thermal water. The development of the supply of health tourism, a leading sector in the Hungarian tourism industry, was promoted by a total of investments worth 89 billion HUF, of which a total of 28 billion state support was given through the Széchenyi Plan introduced in 2001. As a result of these investments, the capacity of the respective spas was increased by 75%, the number of guests grew by 18%, while the increase in revenues was 32% on the average (Mundruczó and Szennyessy, 2005).

In the second half of the 2000s, after the accession of Hungary to the European Union, new tenderable resources became available for Hungary, which allowed a further qualitative and quantitative transformation of health tourism. The “Healing Hungary – Health Industry Programme” (part of New Széchenyi Plan), in addition to promoting further infrastructure developments, creates a link between industries producing health and those providing services. Although the health tourism sector has become a leading tourism product of Hungary, it still struggles with a number of problems. Some of the establishments (thermal and medical spas) are oversized and their construction in their present form may not have been a very considerate decision, and without adjoining accommodation facilities they have a low income generating capacity (especially in lack of solvent demand). There is often a mismatch, furthermore, between the demand of the supply and the quality of the capacities

offered, which leads to a failure of the achievement of the expected goals. Another problem is the situation of the medical hospitals and their positions in the system of social security, which concerns financing in the first place.

The demand side of health tourism shows a special picture, too, which is a result of the different motivations for the two main products (medical and wellness tourism). In medical tourism there is less competition and rivalry among the respective destinations, as the composition of the medical water clearly influences demand. The competition among the wellness centres, on the other hand, is becoming sharper as the supply is enlarged, their products are substitutable to a large extent, and the creation of uniqueness is a great challenge for service providers. The differences between the two demand sides are also a consequence of the various consumer habits and behaviours (e.g. the background of financing, duration of stay, co-travellers), which must be considered by service providers during product development.

Almost all papers written on health tourism emphasise that the development of this sector may contribute to the decrease of the temporal and spatial concentration of tourism in Hungary. Health tourism as a product competitive in the international arena, the increase of the number of guest nights and guests and the money spent by them, the slighter seasonal variation of demand and the complex utilisation of natural and manmade attractions can actually have an impact like this, but we think it is only valid in space to a limited extent. In addition to the accessibility of the respective location it is developments that basically influence demand.

Interpretation of tourism destination management

The model of the system of *tourism destination management* offers a long-term sustainable basis for the touristic destination (Bieger, 1997). The idea of the organisational system created on the basis of spatial concentration and co-operations is that competitive advantages appear in a geographical concentration, and this statement is also valid for tourism. By the increase of the spatial concentration of touristic destinations, the competitiveness of the respective region can be enhanced. However, most of the researchers comprehend destination in a more complex way than a geographically designated spatial unit (Buhalis and Spada, 2000; Leiper, 1995; Pechlaner, 2000). The main feature of a destination is that it is a target area chosen by the tourists, but it is also a reception area with adequate infrastructure, services and local image. Furthermore, it integrates a large number of actors, for the successful management of which a tourism control and management organisation meeting the above criteria is necessary. Our hypothesis is that the creation of a local TDM system and the characteristics of the operation are influenced by several local factors, including the structure of touristic service providers, the character and range of the attraction, and the complexity of the touristic supply built on the attractions.

The first local TDM organisation of Hungary was established in Gyenesdiás, and the number of such organisations has reached 70 by now, as their creation is promoted by tenderable resources. The operation of the TDM organisations is built on four basic principles, which are as follows: bottom-up building, partnership, professionalism, financing and competency. These factors raise several issues in Hungary and are also sources of problems (Lengyel, 2008). One of the most important advantages of the operation of the system is its contribution to the building of the destination, the involvement of stakeholders interested in tourism into the development of the destination and the creation of an integrated supply. TDM organisations allow the replacement of institutions building on the attraction, only, and not on the complex touristic products, operating independent of each other and typically only doing promotion activity (Aubert et. al., 2009).

FACTORS INFLUENCING THE SPATIAL PATTERN OF HEALTH TOURISM

The appearance and characteristics of a health tourism destination is primarily influenced by the presence of the basic endowment, e.g. the attraction. Health tourism in Hungary is typically built on natural healing factors, mostly on medical water, medical caves, medical mud or micro-climate. On the other hand, the destination of wellness tourism are less dependant upon medical factors, they are more typically based on services themselves and their penetration is also influenced by further characteristics of the product (potential demand, accessibility, competitors).

It is true for both types of health tourism destinations that the capital assets and capital absorption capacity of the respective region have a much stronger impact on them than on other spatial types. They are investments with a substantial capital demand which, in addition to providing a return on the investment, must be able to continuously renew themselves. The capital intensity of the product is increased by the fact that in the accommodation sector it is hotels that are organically involved in health tourism, which are the locations of health care and wellness services at the same time, and so they are direct competitors to the spas. The high proportion of hotels is also seen in the impact system of tourism. Hotels have the largest demand for human resources, which is satisfied at lower and meso levels by labour force of the local community and the neighbour settlements. The positive impact of this can be seen in job creation in the first place, its demand for other related touristic products is negligible.

Due to the complexity of health tourism, we can distinguish among several sub-types on the basis of the complexity of the supply:

- Specialised health tourism centres (e.g. Balf),
- Health tourism centres with wellness services as well (e.g. Bük, Sárvár, Hévíz, Harkány),
- Same proportion of medical and wellness services (e.g. Hajdúszoboszló),
- Wellness tourism centres (e.g. day spas appearing all over Hungary).

Actually the two extreme profiles are exceptional; it is usually a mix of the two clear profiles in some proportion that is typical.

Settlement size and the complexity of touristic product structure is another ground for categorisation of the Hungarian health tourism destinations. In the case of medical spas with international and national attraction, the supply of health touristic services may be the basis for a touristic product portfolio. There are several settlements in Hungary which have a health tourism endowment of outstanding attraction but no other touristic product. As regards spas with local or regional attractions, we find ones whose tourism is almost exclusively built on health tourism but also others where health tourism is only a supplementary element of the supply (Figure 1).

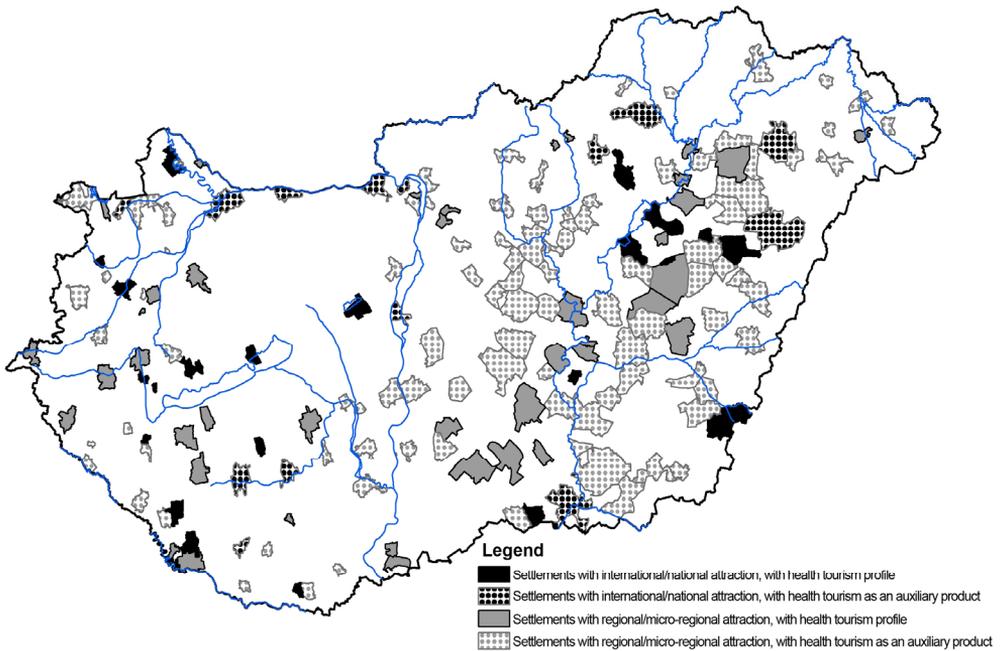


Figure 1 Grouping of the Hungarian spas on the basis of their profile and the range of their attractions

Source: own edition

THE SPATIAL DEVELOPMENT POWER OF HEALTH TOURISM

A dominant feature of health tourism as a spatial type is large-scale concentration. The large amount of capital needed for investments in developments in respective settlements, elevating these settlements from their environment. Touristic infra- and suprastructure are thus concentrated. The fundamentals, the natural healing factors are also strong factors of location, to which spas and accommodations are directly connected. Parallel to the improvement of the quality of the accommodations, however, the other basic auxiliary service elements will find it increasingly difficult to stay competitive on the market (like catering), as their services are directly offered by the accommodations. This process may be further accelerated by the Széchenyi Holiday Card replacing the system of travel cheques. This card can be used in restaurants and other catering facilities if they are connected to commercial accommodation services. On the other hand, hotels in higher quality class will create the basis of other touristic services, of course also in cases when it is not the hotel that directly offers them (like the renting of sport equipment, transport service providers etc.). Also, targeting the more solvent demand, hotels promote retail trade. From the other side, hotels almost “want to lock up” people so that they should spend as big a proportion of their money as possible. This problem is now present in several places in Hungary, including the most significant health tourism centres like Bükkfürdő.

Parallel to this we can witness the diversification of health tourism these days, with the goal of preserving its competitiveness. It is primarily establishments with wellness as their

main profile that integrate new touristic product elements. Such an auxiliary product may be, in accordance with the recent trends, the combination of conference, business, incentive, and golf tourism. There are many examples for this also in Hungary, in Bükfürdő for example there are plenty of business tourism services in addition to health tourism, and the golf course is an attraction for the reception of another target group. The possibility of using several services at the same place is a competitive advantage on the market.

The characteristics of this spatial type are influenced, furthermore, by the limited seasonality of the product, which is also true for the range and appearance of related services. While in the case of seasonal products, related services are also available seasonally, health tourism requires these services all year round, and also provides an all-year demand for them.

TOURISM MANAGEMENT TASKS IN THE SPACES OF HEALTH TOURISM

The specific features of health tourism introduced in the previous chapter influence the activity of tourism management. Among the responsibilities of TDM organisations operating in health tourism centres, the primary task is the creation of cooperation among stakeholders, which is often made difficult by conflicting interests and competition.

A characteristic feature of health tourism centres is the high number of touristic service providers. This kind of product requires complexity, on the one hand, and a favourable economic environment attracts investments, on the other hand. If there are accommodations with a large number of beds and of high quality in the respective settlement, these establishments try to keep guests within themselves with their extremely broad range of services. It leads to the fact that guests with a short stay do not even show up in the settlement in many cases, which is a disadvantage for other touristic service providers (usually catering facilities and providers of sport services). During the tourism management activity at destination level it is just the coordinated, integrated product development of the respective actors that is a primary task, which requires cooperation among the individual members. A TDM organisation has a relatively easy task if members, overcoming their short term interests, make their decisions in order to reach the long term achievements of cooperation. Furthermore, all service providers must be aware of the fact that quality tourism takes more than accommodations and a spa in itself. Exclusive tourism necessitates building on unique local endowments which is not possible without the inclusion of the local actors.

A well established and well operating tourism destination management organisation, on the other hand, does not only offer advantages for service providers. The TDM organisation must be aware of this and must assist members in the handling of the situation that has arisen. A joint information system e.g. offers an opportunity to enter the market and reach consumer target groups, but it also increases competition by the division of quickly and freely available information, on the other hand. Service providers have a constant innovation and development constraint if they want to keep their competitiveness continuously, which may require supplementary resources. An indirect method and tool for the handling of the competition may be the creation of a system of discount cards which is the responsibility of the TDM organisations. As members of the TDM organisation, all service providers can be part of this system that allows guests to have service packages at preferential prices. Experiences suggest that the introduction of the system of discount cards will also increase the attraction of the TDM membership for the service providers.

TDM ORGANISATIONS IN THE HEALTH TOURISM DESTINATIONS OF HUNGARY

We included in the research those organisations from among the registered and the actually operating ones that are typically health tourism centres. Of the 9 questionnaires sent out, 7 organisations sent them back, the list of which and the designation of their area of operation is shown in Table 1.

Table 1 Main characteristics of the TDMO organisations included in the survey

Name of TDM organisation	Area of operation	Year of foundation
Matyó Land Tourism Association	Mezőkövesd	1999
Hajdúszoboszló Tourism Public Non-for-profit Ltd	Hajdúszoboszló	2009
Bük, Bükfürdő Touristic Public Association	Bük	2009
Valley of Medicinal Waters Egerszalók–Demjén–Egerszólát Tourism Destination Management Association	Egerszalók, Demjén, Egerszólát	2009
Gyula Touristic Non-for-profit Ltd.	Gyula	2011
Hévíz Tourism Destination Management Association	Hévíz	2006
Harkány Tourism Association	Harkány	2005
Móra-Tourist Non-for-profit Ltd.	Mórahalom	2009

Source: Data of the questionnaire

Looking at the area of operation of the TDM organisations included in the survey we can see that almost all of them are concentrated on one single settlement. This characteristic alone already differentiates them from other tourism products where, with the exception of big cities, local TDM organisations are usually set up by the cooperation of several settlements. Health tourism centres, which are also the most popular destinations of Hungary, met the criteria defined for the minimum number of guests and guest nights in the TDM tender on their own, given their relatively significant turnover. Also, the foundation and operation of TDM organisations is easier if there is no need to cooperate with a further actor, a municipality. It also implies that the direct spatial relations and impacts of the leading tourism product are weak.

If we look at the *geographical positions* of the organisations, TDM organisations of clear health tourism profile can be found in all tourism regions of Hungary. Each leading destination recognised the possibility offered by the operation of the TDM organisations, which was reinforced by the availability of tenderable resources as well. TDM organisations operate with a larger number of staff: in major destinations – including the health tourism centres examined in our paper – the organisations employ 4-5 persons.

One of the first steps of the establishment of a TDM organisation is the *choice of the adequate organisational form*. In practice we can see four solutions (limited liability company, non-for-profit limited liability company, association and consortium), but most typical is operation in the form of an association or a non-for-profit Ltd. In the process of decision-making on the organisational form, unique features and characteristics must also be taken into consideration, besides objective economic and legal aspects (Aubert et. al., 2009). Health tourism centres usually operate in the form of associations.

Considering the *number and composition of tourism service providers* we can see that despite the small number of municipalities, the number of participants is high from the side of tourism service providers (24 members in Mezőkövesd and 186 in Hajdúszoboszló), as these settlements are characterised by a well built out and multi-actor touristic suprastructure. In the TDM organisation of Bük, for example, the number of accommodations exceeds 100, while in Hajdúszoboszló this number is almost 150. The number of further tourism service providers, on the other hand, is low, so in Hajdúszoboszló, for example, it is only 12 catering facilities, one operator of attraction, one travel agency and 25 other tourism service providers that make the membership of the organisation. If we look at the inner breakdown of the tourism service providers, we can see the overweight of accommodations in the system, as revealed by Figure 2 as well. With the exception of the Hévíz TDM organisation, in all destinations the proportion of accommodations is above 50%, in fact, it reaches 80% in Hajdúszoboszló, Harkány and Bükfürdő. To the opposite, operators of attractions are often not even members in the organisations (Harkány, Hévíz), which reflects the simplicity of supply.

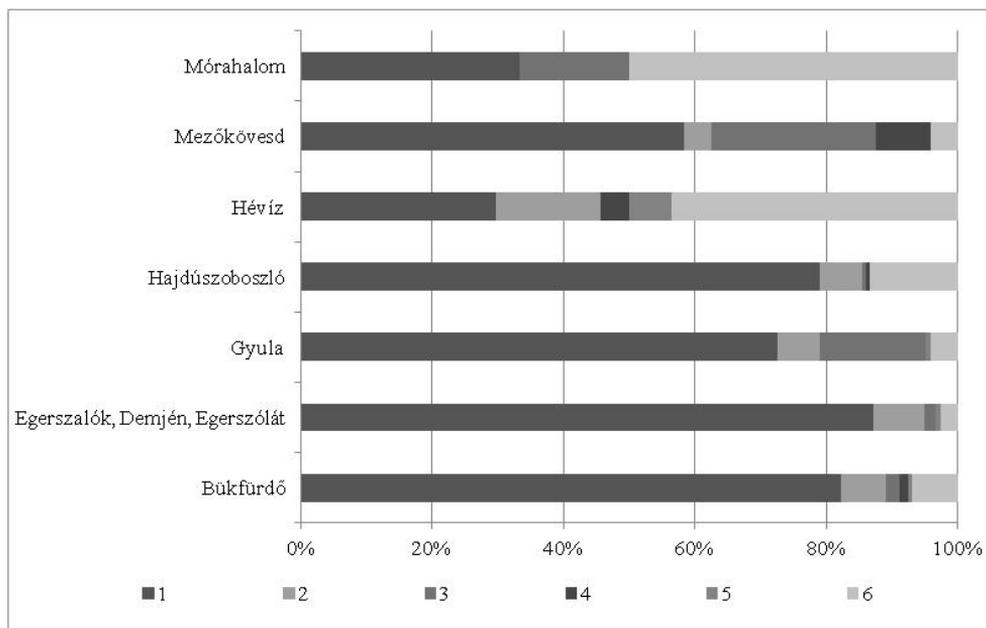


Figure 2 Composition of tourism service providers in the TDM organisations in the survey
 1. Accommodations 2. Catering units 3. Operators of attractions 4. Travel agencies
 5. Companies dealing with personal transport and travel services 6. Operators of other services

Source: Jónás-Berki et. al., 2012

Among the *services* most frequently *offered* by the TDM organisations we find joint marketing activity in the first place also in health tourism destinations, followed by related marketing communication activities (e.g. provision of internet advertisements and internet appearance on community tourism sites; participation on behalf of the partners in travel fairs and other events). Beyond these, however, we find activities that already represent a higher

level of cooperation and product development, such as on-line booking of accommodations, mediation of the guest to use some services or sharing the information and findings of community opinion polls and statistical analyses. The creation of complex packages of the services of the members and the marketing of these packages is not typical even in health tourism destinations yet.

The *most important achievements* of the operation of the TDM organisations include, in addition to the basic activities (like tourism marketing campaigns), the development of information infrastructure (e.g. touch info devices, systems of signposts, renewal of tourism information offices), and image development. In health tourism centres we can see achievements beyond classical joint marketing activity, achievements that mark higher levels of cooperation. Such results are the setting up of information offices, and the launch of new services like outdoor fitness park, children's playground, sport animation, bicycle rent or a system of discount card integrating service providers. The cooperation of the stakeholders is already a success in the eyes of the TDM organisations, which is also an implication to the difficulties of the foundation and operation of the organisations.

The major *external obstacle* to the operation of the organisations, in addition to the scarce finances, was the initially slow management of the tender for their operation. The financing of the operation of the TDM organisations is a topical problem in each case. It seems to be the most critical point in the sustainability of the system. Health tourism centres also see the long term financing background of their operation in the guaranteed allocation of a minimum 20% of the local tourism tax and state support. Going a step further, the leader of the TDM organisation of Hévíz sees the direction to be followed in strengthening their own activities and becoming an inbound travel agency. Further problems raised by the experts in the questionnaires included the lack of regulation and a predictable framework of operation (e.g. the Tourism Act that is just being prepared). The importance of connections to the external environment – which can also actually be called a system of dependencies – is indicated by the fact that Harkány mentioned in the first place among the hindrances the lack of money, the economic crisis and the lagging of their environment. In the Egerszalók area it is the deficiencies of the transport connections of the three settlements of the TDM organisation that is a problem.

Among the major *internal obstacles* are the excessive number of members and their conflicting interests. Another problem related to the membership is that they expect results and spectacular achievements already in the short run, and they do not require/often do not understand the long term concepts. Many respondents mentioned that their relations to the municipal self-government are an obstacle to their work, because the municipality usually expects to have a higher level of authority, which jeopardises professional aspects.

CONCLUSION

Our study focuses on the spatial organisational and management processes of the Hungarian health tourism centres. Health tourism centres, the leading destinations of Hungary in addition to the capital city, Budapest, have reached a higher level in several fields of the operation of the TDM system, in accordance with our preliminary hypothesis. The characteristics of health tourism as a type of touristic product have an impact of the management system, which leads to the birth of a specific structure in the locations examined. It is most visible in the number and composition of members, and in the long-term solution of the financing problems. In the local organisation, TDM organisations of the health tourism destinations usually have only one municipal member each, but an outstandingly high number of tourism service providers. The majority of the tourism service providers are accommodation providers, which also indicates the concentration of health tourism. Due to the

strong position of health tourism destinations in the tourism sector of Hungary, the potential solution of long-term financing should be found by the TDM organisations. The large amounts of local tourism tax deriving from the outstandingly high number of guests and guest nights justify the fixing of the financial resources of operation to the tax revenues.

The indirect impact of the TDM system is that by the cooperation of the stakeholders it gives related services, in addition to health tourism ones, a chance to more intensively participate in the tourism market. Also, it is suitable for handling the conflict caused by the concentration of health tourism, so its spatial development impacts can be felt in a broader circle. Health tourism as a product producing the largest concentration of guests in the countryside Hungary can contribute this way to some region's becoming real destinations, which is also a prerequisite of competitiveness.

Acknowledgements

The paper was written in the framework of the TÁMOP (Társadalmi Megújulás Operatív Program, Social Renewal Operational Programme) project 4.2.2/B-10/1-2010-0029, called "Support of the workshops of scientific training at the University of Pécs".

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Central European Regional Policy and Human Geography	Year II, no. 2, 2012 , pp. 37-47.
HU ISSN 2062-8870, HU E-ISSN 2062-8889	Article no. 2012-10

SITUATION OF HUNGARIAN GEOGRAPHY IN THE EARLY TWENTY-FIRST CENTURY

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Abstract: From time to time papers dealing with the place of geography on the current map of science, with the justification of its existence – reciting links to the practical life – are published in the Hungarian and international scientific literature.

In our opinion, according to the literature and the native situation, the recession of the importance of geography is worldwide. That is why it is worthwhile to survey the related Saxon scientific literature from the last years, to analyse the possible development potentials in regarding of the survival of geography and geographic idea.

The goal is to come forward with suggestions concerning the future of geography – independently from the affected field (physical or human geography) – by installing these ideas into the native institutional system, and to the scientific and sector-specific structure.

Key words: physical geography, human geography, education, society

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THE EVALUATION OF THE CURRENT STATE OF THE GEOGRAPHY ACCORDING TO THE SCIENTIFIC LITERATURE

From time to time papers dealing with the place of geography on the current map of science, with the justification of its existence – reciting links to the practical life – are published in the Hungarian and international scientific literature. The geographical society takes the importance of geography self-evident, but for an outsider this is often not so unambiguous.

In our opinion, according to the literature and the native situation, the recession of the importance of geography is worldwide. The process affects many factors, but the indications are well-marked. For example some illustrious universities in the USA have no Geography Department (Dobson, 2011.).

It is worth to mention that on the lists constructed in 2005 and in 2008 by The Prospect/Foreign Policy magazines – introducing the 100 most potent intellects – at the first glance there is not one geographer (Ward, 2007). Actually, there is a bio-geographer, Jared M. Diamond (the professor of the UCLA Geography Department, earlier director of the American WWF.), who is recited as a biologist and historian. Also there are others related to geography, for example Paul Krugman, or Francis Fukuyama.

Besides these indicators, authors propose well defined problem divisions, caused by external threats to our discipline, or resulted from the dual characteristic and the emerging firm diversification of geography.

The following processes trouble the Saxon geographers (not in order of importance):

1. The ingression of other disciplines to geographical field of research, for example Earth-system science, and Regional science.
2. The increment of the distance between the geographic fields, and the failure of the consolidation efforts.
3. The other segment of this process is that scientists rove to the border-line of geography and other disciplines, and these scientists are often not counted as geographers any longer (e.g. glaciologists).
4. The recession of geography in the education (in all aspects).
5. The lack of fundamental geographic knowledge in between the decision makers, and the wide classes of society.

In our paper, we will survey each of these problems in a short chapter from a Hungarian point of view, in correlation to the external experiences.

THE POSITION OF GEOGRAPHY AMONG THE SCIENTIFIC DISCIPLINES

In their works Dobson (2007), Thrift (2002) and Pitman (2005) explain the importance of geography on the one hand for its preterit – as a fundamental science it added to the map of Earth, the colonization, war and strategic planning, the organization of the commercialism of the age of capitalist – and on the other hand for its recent achievements, for example in glaciology or in the quaternary period research. Besides, they emphasise the “complex” approach (landscape ecology, geographical information systems or geomorphology etc.) and holistic aspect in geography, distinguishing it from the other – usually reductionist – disciplines. For a long time the third unique characteristic of geography was spatiality. This specificity is no longer extraordinary because of the appearance of new disciplines like regional-, rural- and Earth-system science. Besides, conventional disciplines – like sociology, biology and ecology – opened up towards spatiality. Therewith we reached the “greatest fear” of geographers: penetration – the ingression of other disciplines to the field of research of geography (Turner II., 2002).

The survey of the native and external scientific literature during the last ten years exposes considerable differences in the estimation of the most dangerous disciplines. As long as Mészáros (2006) mentions the new human geography and regional science foremost, of later years in the international scientific literature a minor debate evolved about the Earth-system science. The cause of the difference is apparently that regional science is in contest for more than 50 years with Western geographers, and all participants found their place already in academic society.

In Hungary the regional science began to institutionalize only in the early 1990s. Mészáros (2006) in his analysis established, that regional science is able to create new quality, distinct from human geography, and accordingly it has place in the Hungarian scientific life. Partly contradicting this, he describes in his paper, that the research themes of this field indicate great similarities to geographers. According to this special Hungarian feature we would like to call attention to some aspects:

- in Western Europe, regional science is essentially theoretical, making basic research, and in Hungary it is dominated by applied research characteristics,
- in the USA and other western countries regional science education exist(ed), which is absent in Hungary (it exist only in PhD trainings),

- native regional scientists are mostly economists and geographers, resulting in the fact that the methods, cogitation and themes of their own discipline is part of their work.

We would think, that these days geography has no reason to fear from regional sciences, because with the modification of developmental politics – earlier in the USA, and these days in the European Union – the claim of the politics and administration for such analyses and background research decreased (environmental sciences and rural sciences are taking its place progressively). The authors think that at the field of the regional science also a survey of possible solutions takes place, similarly to other fields of geography.

For the native regional sciences it is also a negative aspect, that it has no bachelor degree training, so there are no researchers whom identity is tightly bound to this discipline, whereas this could be the prime ground for its survival. Besides, it is worth mentioning that the Regional Research Centre of Hungarian Academy of Sciences lost its institutional independence in 2012, and was contracted with the Institute of Economics of Hungarian Academy of Sciences and with the World Economic Research Institute of Hungarian Academy of Sciences.

The question arises: is there or could there be an independent research field for all of the scientific disciplines? Does really an incursion take place, or are geographers too sensitive? According to Johnston (2006) we could establish, that in the last two decades fundamental modifications happen in the organisation of science, with the principal innovation of the appearance of interdisciplinary sciences. One forerunner of this process was regional science, but nowadays there appeared much more complex ones, like environmental-, Earth-system- or rural science. In the article of Pitman (2005), the author complained about the fact that an Earth-system researcher accomplishes the same tasks as the physical geographers and even adopts their holistic approach. But even Pitman (2005) acknowledges, that the knowledge of geographers – “especially in the field of human geography – is too “shallow” in some fields”, so they cannot join in to deeper research. The authors think that his establishments are partially relevant, because as practising geographers they also experience that a more detailed education in some fields would be necessary during academic training (but the importance of self-education is also considerable).

However, regarding the estimation about the Earth-system science – or any other discipline – taking positions from geography, the authors do not agree with Pitman. These new interdisciplinary fields have the potential regarding a certain problem to take information from all the concerned scientific fields, and serve these data in a new quality. So nowadays it is inane to talk about exclusiveness associated with a research theme or field, and it is also senseless to envision an attack from another academic discipline. In these respects, a change of aspect is well overdue, and we – and geography in general – needs to benefit from the process.

What can geographers do in a situation like this? Johnston (2006) proposes, that everyone must immerse in their fields of interest, and needs to establish acquaintances and dependability in the associated academic and research field. The authors would like to also recommend not to forget also their geographer habitat, like many determinant native geographer.

With these suggestions we arrive to our second and third points: The increment in the distance between the geographic fields, and the geographers taking part in border-line disciplines. The two facts are tightly connected because the more researchers specialize, the less the physical and human geographers understand one another.

According to Haggett (2006), “geographic knowledge” is not interpretability without the conjugate fields, and the immersion in the same fields causes the “fragmentation” of

geography. This process determined the development process of geography in the last 200 years. At times this produced the enlargement of published results, and more and more intense specialization.

The problem is that this process is on the one hand the solution and on the other hand it is also a relevant danger because it means a kind of get out from geography. This is the reason why Haggett cautions to turn towards uniformity, towards the universal holistic aspect, so instead of the “increasing specialization the ecologic approach needs to be emphasized. This approach is strongly connected to the field of physics and biology, this way we can include our own environment transformation activities” (Haggett, 2006).

In the Saxon literature there are some attempts to set the common way. This theme also arise in the native literature: according to Mészáros and also to the authors of this paper, GIS will certainly play an important role in this offering a common base (database and methodologies) for both of the fields.

The egress from this situation could be the ability to synthesis, one of the most important features of geographers. The authors opinion is, that this can not just establish the synthesis of geography, and the avoidance of the vacancy, but can also give a good answer to the challenge of interdisciplinary fields. Besides the suggestion of Johnston (2006) of occupying the border-line disciplines it is also important to preserve the “centre”. Thus it is important to maintain the centurial heritage of geography that assured its essential place in the former centuries of the development of mankind – a legacy of the collection, systematization and organization of information related to Earth that is unique in the other fields of academic fields. With this action, geography can become the most relevant field in the new system of interdisciplinary fields, both in case of environmental and in Earth-system sciences.

Besides the problems enlisted in the Saxon literature, and in the beginning of this article, the authors would like to mention an other proposition, the direction of the scientific research. The current problems mostly arise (also) from the fact, that the fragmentation of geographic research leads to directions, of socially questionable usefulness – most importantly researches emphasizing the virtual space problem. The geography trying to follow the innovation of the world seems to find it as a prospect (Wertheim, 1999; Jakobi, 2002; Mészáros 2003; Whitaker 2004).

The virtual space (cyberspace), as a concept, emerged in the middle of the 1980s, and became extensively researched in geography in the 1990s by the penetration of informatics, and the common appliance of internet. The studies first dealt with the concept of the dangers and addictions by the cyber world, essentially among teenagers. They emphasized the insulation, alienation and the extinguishment of the real social acquaintanceships (Tóth, 2010). In the middle of the 2000s, the social services launched into the everyday life, and interlaced the daily life, the fears changed, and the special community forming power of the virtual space emerged – e.g. the organization of demonstration in Egypt or Libya – and the danger nowadays come rather – in correlation by the sharing of excessive personal information – in the form of data fishing.

GEOGRAPHY AND EDUCATION

Haggett in his Geography dealt also with the establishment of geographers, as a fundamental factor effecting the future of geography. The Hungarian universities, respecting the importance of this theme also emphatically studied the fate of graduates. Perhaps the most accurate is the study of the University of Szeged assembled by the geographer co-workers resuming the first 17 years of the training.

Their analysis summarises the experiences of two from the five fields available in Szeged, the environmental researcher and the geoinformatics. According to the study 70 % of the graduated students found jobs connected to their qualification, the rate among the environmental researcher was a bit less. One of the most important statements of the study was that all of the geographers had diversified knowledge but to find their place at the labour market they must acquire more detailed information about supplementary fields, retraining and perhaps another certificate is also necessary.

The advantage of geographer certificate is practically the same as its disadvantage: the complex aspect makes the penetration between the related fields possible, and the holistic approach of the problems, but compared to other more confinable jobs, e.g. engineer, cartographer, or geologist the lack of deeper competence inhibits competitiveness. For future plans the increment of the currency of geographer profession and the enlightenment of employers of usefulness and expedience can be determined (Nyári, 2011).

It is not surprising that since the society cannot handle the geographer profession – except for geography teachers –, even after about 20 years of training, therefore the geographic science and the presence of the aspect needs confirmation. This implies the insufficient acquaintance of the broad ranges of society and the erosion of geographic knowledge. There is also much work to do in this field, including the estimation of the real reason for the need of geography. It is very easy to discover geography in the everyday life. It is part of the casual orientation, entertainment (e.g. educational quizzes, or tourism), in the weather determining our dressing, in the most important news of the world – natural catastrophes and climate change. Besides, geography is one of the keystones of economic developments by the validation of regionalism, regional development, environmental or natural aspects. Taken as a whole, geography provides a concrete basis for the orientation in the natural and social medium of the world, and for agriculture, economy and development of settlements, environment protection, disaster recovery and for environmental awareness.

These facts are linked on an increasing tendency of the EU, presuming that the geographic environment and landscape usage are the keystones of the European identity. Even in the environmental protection enclosures compulsorily attached to the applications of local authorities cannot go without the knowledge contained in environmental and human geographical descriptions (Csorba, 2011).

If the importance of geography decreases, and comes irrelative in the primary, secondary or higher education, the society will loose a “handhold” that makes manipulation more difficult. To avoid this, the dissemination and amplification of geographical knowledge and the enforcement of practical usability by new methods is fundamental – not only within the community of geographer.

The recession of geography – as a scholastic discipline - is a long known and well tracked problem overhung by several possible solutions. The geography store of information changed a lot during the curriculum reforms of the 90s. In parallel with that the time accessible to teaching decreased significantly. Both the number of years by independent geographic presence and the number of the classes within the years decreased (Útóné, 2002).

The claim of improving the ability of raising and solving problems is acknowledged by the authors, but it is also important not to disregard the fact that the aims of geography as a subject are only available through the acquirement of adequate topographic and lexical knowledge.

The changes of the last period affected both the physical and human geography. In physical geography the pollution concerning the geospheres, and the human environmental modification and consequences became determinant. In human geography subjects like globalisation, market-economy, the main characteristics of multinational companies, aspects of the steam of functioning capital, or the determinant financial processes of the world

appeared. The modification of the content enforced the interdisciplinary character of the discipline and its connective role among natural and social sciences. Even so, the loss of prestige of geography is effectively constant, because the population has no adequate information about the importance of geography mediated knowledge in everyday life.

Accordingly, modifications are essential, to ensure the proper contribution of geography to liberal education, and to the preparation of private and social life. But currently this aim is remote. The negative effects of the decade long reform are mostly perceptible these days – characterized by the recession of geographical education in primary and secondary school, and – opposite to the composed requirements – by the decrement of geographic knowledge.

Our survey – performed among the environmental agro-engineers of the Kecskemét College in every year since 2006 (since the creation of the qualification) – is a good example to demonstrate the need of the foundation and improvement and the low level of general geographic knowledge. The study can be considered as partially representative because all of the classes were included (because of the low number of students, the number of participants was 61 in total).

The test contained 10 questions, inquiring for basic information especially from physical geography and topology, including questions like “What is the monsoon?” “Do you know any active volcanoes, or national parks?” or “What is the capital of the selected country or county?” 80 points could be gained during the test, and results can be seen in Figure 1.

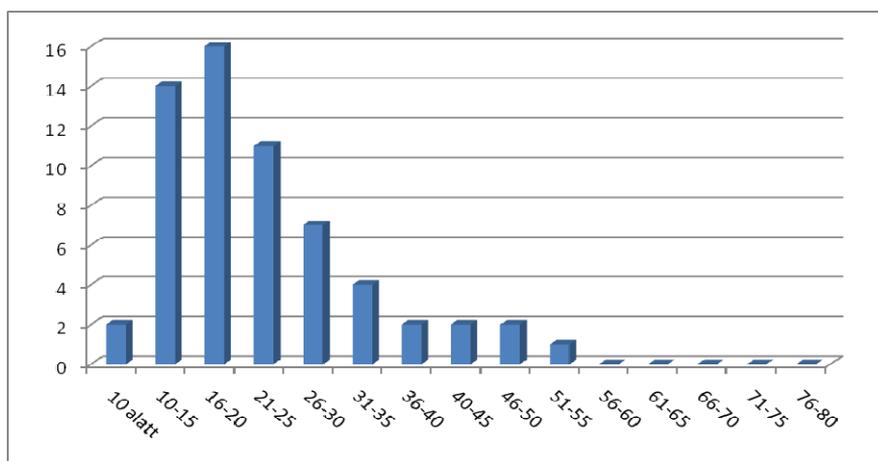


Figure 1 Geographical test results in Kecskemét 2006-2012

Data source: own research

As it can be seen in Figure 1, the majority of the subjects had problems with the obtainment of 50 % result. 50 % of the students (30 persons) gained 10 to 20 points, a very low result compared to the maximal 80 points.

This means that the average student who got into higher education has no clew about the capitals of the States of the European Union, nor about the chief towns of the counties, or with the hydrological and relief attributes of Hungary. This result signs not only the more difficult education of geographic disciplines, but draws attention to the fact that the recession in the primary and secondary school geography education fundamentally changed the

characteristics of “geography knowledge” changing to “no-knowledge”. This pattern strongly relates to the above listed risks. The deficiencies in the primary and secondary school education of geography are also evident in higher education. This turns out not only from the meagre basic knowledge but also from the admission-rates of geographic studies. The number of entrants did not decrease but the quantity of students applying at the first place to geographer decreased by one-third part in 5 years (Mezősi, 2011). This phenomenon implies the lack of motivation caused – among other things – by the common decrement of geography. The situation is also weighted by the instability and financial problems of higher education, and adverse demographic processes – affecting not only geography but all of the educational segments.

The recession of geography concerns not only Hungary. It emerges for example in the work of Jerome E. Dobson (2007): “Lets bring back geography for science, education, commerce and government/decision-makers!” His suggestions are:

- emphasizing the spatiality: application of spatial science instead of geography science,
- informing society about the aims of geography,
- increasing the number of geography departments in higher educational institutes,
- especially in the US, but the enforcement of departments is also necessary in Hungary, intensifying the importance of geography in all educational grades, instead of its depression.

GEOGRAPHY AND SOCIETY

The fifth problem enlisted in the introduction is that society, political elite, and decision-makers have inadequate or sometime inaccurate information about geography and about the work of geographers (Ward, 2007). Ward (2007), partly as an answer to the propositions of Thrift 2002 writes an article about the appearance of geography in public cogitation administering two main problems: the presence of geographers among the intellectually acknowledged persons, and which channels geography uses to reach society. Besides defining the native aspects of this problem, we would like to analyse three other questions in this chapter:

- the global position of Hungarian geography,
- the role of geographers in the administration,
- the role of science in the formation of different political departments.

Our short analysis will be done in this order. The determination of the place of Hungarian geography in the global geographic science can only be experimental. The main problem is, that although there are several adequate indicators, but data concerning Hungarian researchers are quite inaccurate – especially the data referring to the Hungarian authors (usually because of the inadequate science field definition, publications mingle among scientists of similar names). This means, that accreditation, scientific index-numbers of individual researchers cannot be compared.

Figure 2 shows the distribution of authors of geographical publications by the SCOPUS data base, including 159 countries. Fundamentally, it shows the autarchy of English geography school, especially, if we take into consideration that many American researchers studied at universities in the United Kingdom. The USA and the UK means together 43 % of the total representations. The other extremity is 28 %, which comes from the publication data of 143 countries. Hungary’s position is 38th on this list with 193 publications. It is far beyond our country’s position (rank 87) on the list, which shows the population of the countries in the world (CIA Factbook). In our analysis we investigated numbers of representations in the last 10 years. We observed, that essentially there is no difference, we are in the 38th position (with 143 articles).

Although this database has drawn our attention to an interesting trend; it means a sweep of Asian and Brazil geography. China has 2266 publications, and 2052 publications of these were printed in the last 10 years. We can observe similar ratios in the case of Singapore, Taiwan and Hong Kong as well.

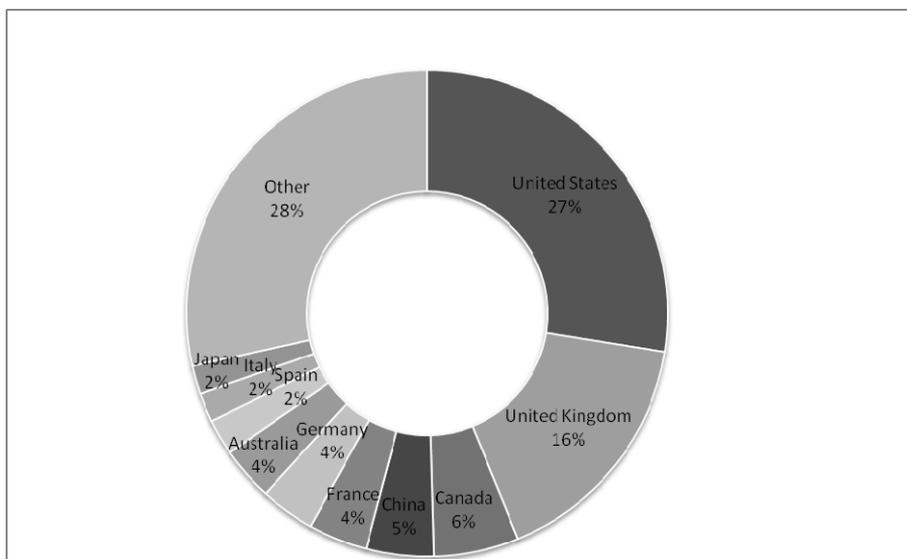


Figure 2 Distribution of the authors of geographical publications by the SCOPUS database

Data source: own research based on SCOPUS

Ward (2007) examined what is the geographer's intellectual ascendancy like in the world on the basis of The Prospect and Foreign Policy's list. We tried the same in the Hungarian public life on the basis of his example. Our database was the "Who is who? 2002" (edited by Biográf Pulitzer). We can find 13,981 persons in this publication, from which 179 person are geographers. We support Ward's observation that geographers are not among the most influential intellectuals because we can find similar ratios in the international data in the database of the Hungarian public persons.

The third issue that we wish to address briefly is the role of geographers in the public administration. This theme was chosen for two reasons: first, because we think that the work of the public administration represents the most important relationship to the society, and second, in Hungary there are specific legal rules which reduce the possibilities of geographers in this sector.

The qualification requirements of the state and local government administration are both covered by 9/1995 (II.3) government regulation until the first quarter of 2012. Then the 29/2012 (III.7) decree came into force. Requirements of the new legislation are basically unchanged, but there are some progresses related to professional geographers. By the earlier regulation geographers can apply to positions at local and state organizations which operate in the fields of nature conservation and environmental management and regional, urban and rural development. This was expanded over the area of land registry and mapping in 2012. However, there are number of areas where geographers can accomplish the tasks such as

settlement management and operation (sociologists may occur here), statistical information services, or in the tourism-related functions. The latter, it should be noted that the dual nature of our science causes some problems here because the law requires degree in arts, but geography degree issued by the Faculties of Science in Hungary. So the specialized training in tourism is worthless because the regulation does not allow the application. Because of this, the geographers should endeavor to change the regulation, and specify the areas where they have real competence.

The last element which we focus in this article is to investigate the role of geography in shaping various policies. We could not undertake a full exploration, so we only would like to point out some of the key areas where it is believed that domestic geographers and geography plays a major role in the research activities and in the results too. From the side of physical geography we can highlight the research of the local effects of global climate change such as the VAHAVA project. Originally this project had agricultural sciences determination while there was significant participation from geographers in the activities. This project was important from other perspectives too, because this was the first which brought together many disciplines and their organizations to a research collaboration to try to give visions how to solve the problems related to the global climate change, and it was well received by the society through the media. Because of the feature of the program those colleagues got a role in this project who works especially in the field of climate research. In addition, of course other aspects were also analyzed such as 24-hour rainfall in hilly and mountainous areas which form lightning floods or the increasing possibility of erosion damages.

In case of social geography we find more connections with social issues which came from the discipline itself. The personal and institutional coincidences make it hard to separate regional science and geography in Hungary, but it can be said that Hungarian geographers significantly contributed to the domestic regional development and regional policy, and also had a dominant role in the making of the national rural development policies from the SAPARD to the Leader program.

Besides the former classic areas, geographers have been involved in the reform of health care and other public services, and in the changes of territorial public administration as well. In this context, many geographers are working in the aforementioned areas of many ministries, both in professional and political positions. We believe in this respect that the position of the domestic geography has improved after the 2000s, but we feel these persons should do more to the reputation of our science and profession.

CONCLUSIONS

The most important conclusion we can say about the analyzed processes that we might not have as serious problems as the geographers usually think. The Hungarian geography has a stable performance in international comparison. Both physical and social geography have those researchers who are able to present our country at an international level. We found no significant difference compared to the United States of America or to the United Kingdom in the reputation of geography and geographers by the public. Obviously, the profession feels in many ways that the past decade was worse than ever before but this is not the retreat of geography. It comes from general reasons such as significant changes of science financing, which process has both winners and losers. So the problem does not only concern geography but other sciences are involved too.

However, there are opportunities for geography, such as understanding of the Earth as a system, or even to analyze the environmental, economic and social impacts of climate change. These areas are important for the humanity, and have an increasing value in the near

future. So these researches and their results can improve the appreciation of the public about geography as a science.

To achieve this we have a number of tasks to be completed. First of all, we should not regard other sciences as "enemies". Instead of this attitude, we must try to take advantage of the emerging interdisciplinary sciences as a possibility for geography and individual researchers. Geographers must participate in the research activities of border or associate science fields, and have to synthesize the results from all areas, so they can improve their reputation and credibility. In this way the dual feature of geography will be further intensified, which is rather an opportunity and not a threat. However, it is very important to establish the common values of geography (spatial and holistic thinking) in the training of students because this can be the base of the unity of geography, and in the future they can uniformly represent our science.

Geographers need deeper knowledge in some fields related to mathematics, physics, chemistry and biology to join to the research activities of border sciences. In the future this wider basic knowledge will enable a self-education of important sub-areas, which will help to gain credibility in these fields. We highlighted the expansion of the nature science knowledge, because these are the ones that cannot be mastered individually and form the basis of deeper understanding of several areas. However, this does not mean that these could be applied only in physical geography. Knowledge of associate sciences are useful to social geography as well and bear in mind that geographers should be competitive with economists, sociologists, and statisticians.

Training is important not only in higher education, but on the primary and secondary level as well. We cannot allow the teaching of geography to be left in a peripheral position which is typical in Hungary nowadays. Probably this is the only way to interact with the entire society. In addition, the everyday life is increasingly requiring a certain level of geographical skills and knowledge.

The social reputation of the Hungarian geography should continue the path started earlier after the political system change, and must be present in the research of Hungary's social and environmental problems. We think well founded research activities can build social usefulness more than anything else, and help to bring back of the importance and reputation of geography both for the present and the future.

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CLUSTERS - THE MISSING ITEM OF THE INNOVATION CHAIN? THE ROLE AND POSITION OF CLUSTERS IN THE GREAT PLAIN REGION, HUNGARY

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Abstract: Nowadays, knowledge-based economy and innovation are fundamental in territorial development and planning. Despite of the strong research background, Hungary and the South Great Plain Region have a moderate innovative performance, partly due to the low activity of the small and medium sized enterprises. Territorial innovation clusters can have a significant role in the stimulation of growth and sustainable economic development. Clusters involve (incorporate?) the most important scientific and business actors of a territory, help to close the gap between business and research life and accelerate the introduction of innovation activities to the market. Consequently, generating clusters has become an important tool of development policies in the European Union and in Hungary as well. This study highlights the importance of clusters in financing and strengthening the innovation process. The main objectives are: to assess the clusters operating in the South Great Plain Region and to evaluate the results of a survey focused on the innovation performance of accredited clusters. This study describes how the financial gap existing in the innovation chain at present could be closed up by the knowledge-based cooperative environment of the clusters.

Key words: clusters, innovation, knowledge-based economic development, accredited clusters, South Great Plain Region

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INTRODUCTION

Clusters and cluster-based economic development have become well-known and somewhat overused phrases by nowadays. The national literature has been dealing with the concept of clusters and their economic and geographical dimensions for more than a decade. Due to the funding sources available in the recent years, an unprecedented number of clusters have been formed in Hungary. In the so called "Triple Helix" model, Etzkowitz and Leydesdorff (2000) highlight the common goals and interests of universities, government and economic sectors and emphasize the importance of collaboration among the three sectors for the development of a knowledge-based economy (Etzkowitz and Leydesdorff, 2000).

Clusters, and especially innovation clusters are of considerable economic importance and are based on the cooperation of these three sectors as they are actively supported by the state and involve the most important representatives of science and business. In the improvement of competitiveness, research and development in addition to innovation have particular roles beside the infrastructural conditions and the human and social capital (Lengyel, 2000).

Despite the significant and internationally recognised research background, the infrastructural condition, and the growing number of corporate R&D units, the innovative performance of Hungary has decreased sharply. According to the Annual Report of the European Innovation Scoreboard 2011, Hungary is only a moderate innovator with a below average performance. Hungary's relative strengths are present in the fields of human resources and in terms of economic effects while her relative weaknesses are in open, excellent, and attractive research systems, finance and support, linkages & entrepreneurship, intellectual assets, and innovators (Pro Inno Europe, 2011). This relatively low performance is partly due to the low innovation activity of the small and medium sized enterprises. Most of the innovation-based ideas and enterprises quickly disappear without the required capital, professional support, and market knowledge. The financing of this kind of actors is almost completely missing from the innovation chain in our country. The question is whether the clusters formed with the help of recent resources can be the missing items of the innovation chain. In my work I wish to highlight the relationship between clusters and shortages of innovation funding.

THE ROLE OF CLUSTERS IN THE KNOWLEDGE-BASED ECONOMIC DEVELOPMENT

The wide cooperation and active participation of the universities, research centres and corporate development centres is fundamental for sustainable economic growth. That is why territorial innovation clusters play a very important role in the stimulation of growth and economic development (Rechnitzer, 1994; Rechnitzer and Grosz, 2005). According to Porter (1990), the competitive advantages of each activity or industry can support the long-term sustainable development of a nation. The innovation systems can accelerate the development of a territory only if there is a high level of interaction and cooperation between the innovation participants (Dóry, 2005).

The competitiveness of the states can be ensured by the competitive economic territories, in which territories the various forms of cooperation between companies and institutions and clusters of the local companies can be formed. In these kinds of clusters, competing and cooperating companies, suppliers, service providers, and associated institutions use each other's products, they are based on the same knowledge-base and infrastructure, and they can make use of similar innovations. (Porter, 1990). In today's business environment, competitiveness depends on the productivity of the entrepreneurs, in which the strengthening of the advanced technology and the knowledge-base outweigh the industry and the specific activity. As a result, only innovation can maintain competitiveness. The permanent competitive coercion existing in the global economy generates a continuous competition in innovation, which can ensure for clusters to be territorial innovation centres in the long run (Porter, 1998; Buzás, 2000). In the accelerating economic environment, the connecting scientific and innovation outputs result in fast development but significant territorial discrepancy. The competitiveness of a given country is influenced by the products with a high level of added R&D value (Mészáros, 2010). Formation of the traditional clusters takes a long time, while the synergic and agglomeration benefits generate a self-motivating and self-sustainable process. Of course, this process can be consciously supported and accelerated by economic development policy. Cluster-oriented policy is particularly important in development and in the peripheral regions and countries, because in these territories there are more intense negative factors that can delay the self-reinforcing processes and the natural bottom-up forming of clusters (Grosz, 2006).

There are two different kinds of cluster approaches in the European Union. According to the first one, which is more connected to traditional industries, the clusters are the tools of

regional economic development and restructualization, and they include as regional leading sectors the economic, professional, educational, consulting, and developmental actors of the industry. The other concept is related to "knowledge economy" and focuses on the knowledge base and innovativeness accumulated in clusters. According to this, clusters are spatial concentrations of the activities based on the results of research and development activities (Isaksen and Hauge, 2002; Lengyel 2002). The European Union considers cluster development as a key area, and its innovation strategy of 2006 outlines the competitive advantages of the clusters for their members, and it anticipates substantial EU resources primarily for innovative clusters. The Commission Notice called "The putting knowledge into practice: A broad-based innovation strategy for the EU" highlights the advantages of clusters: *"Being part of a cluster is an important competitive strength for business. Clusters help to close the gap between business, research and resources, thereby bringing knowledge faster to the market. Successful clusters promote intense competition along with co-operation. They enhance productivity, attract investment, promote research, strengthen the industrial base, and develop specific products or services and become a focus for developing skills. World-class clusters attract brilliant minds that sustain innovation – Silicon Valley is the best-known example."*

That is why "cluster policy" has become an important element of innovation policies of Member States as reflected in the National Reform Programmes, and also why cluster policies are supported by Community instruments. The most successful and especially innovative clusters are based on cooperation between the most important scientific and entrepreneurial actors. Clustering points out the importance of the so-called "bridging institutes", which have an important role in reducing the gap between knowledge creating and utilizing institutions. Geographical proximity is not the only determinative factor in the forming of clusters, relationship, and common innovation performance of companies and research centres. The innovation capacity of the enterprises is more and more defined by non-quantifiable factors such as knowledge-base, social capital, and the level of trust between the collaborating companies (Lukovics, 2005). The relationship network of the individual cluster members has become more and more important in the development of clusters and how they support innovation. In the process of interactive, collective learning not only the information and knowledge sharing, but relational proximity has also a significant role (Vas, 2009). Besides the geographical space, the relational space also contributes to the spread of knowledge and the development of innovation and innovative relationships, which ensures the base of clusters (Grosz and Rechnitzer, 2005).

THE FINANCING OF INNOVATION PROCESSES

There are various definitions of innovation in the literature. Joseph Schumpeter (1912) was the first economist who drew attention to the importance of innovation. According to him, the innovation is the introduction of new goods (...), new methods of production (...), the opening of new markets (...), the conquest of new sources of supply (...) and the carrying out of a new organization of any industry" (Schumpeter, 1912). Later this interpretation was widened and innovation was considered not only a linear process of isolated actions that follow each other but an open and horizontal approach.

Innovation is a very complex and complicated process, which includes the interaction and the multiple feedback of research and market opportunities, abilities, and strategies (Pakucs, 1999). According to Lundwall (1992), innovation is a complex interactive learning process (Figure 1) in which it is necessary to evolve and maintain the effective interaction and connection between the innovation phases and actors. This theory was supported by the Chain-Linked Model of Kline and Rosenberg (1986).

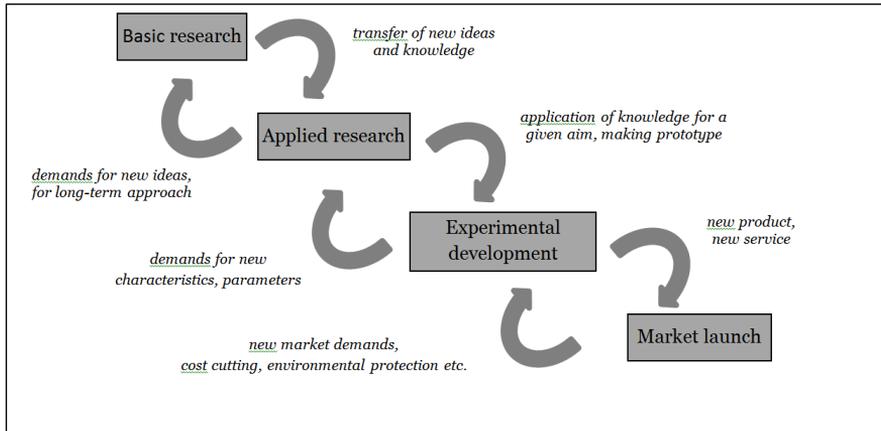


Figure 1 The non-linear innovation model

Source: Magda, Dinya and Magda, 2008

According to the widely accepted definition of the OECD (2005), "*An innovation is the implementation of a new or significantly improved product (good or service), or process, a new marketing method, or a new organisational method in business practices, workplace organisation or external relations*" (OECD, 2005). Above all innovation is the result of the interaction between the knowledge producer, the knowledge applier, and the knowledge transfer actors on a regional level (EC, 2006). Innovation is an interactive developmental process which requires the continuous communication and cooperation between the actors (Tödtling and Tripl, 2004). According to Kleinhencz, the governmental institutions making the economic policy, the organizations engaged in research and development, the educational institutions ensuring the necessary knowledge base, and the financial and bridging institutions participate in the innovation process (Kleinhencz, 2002).

The financing of innovation is always a crucial factor in the innovation management process, and innovative enterprises face particular difficulties in raising funds. Many of the traditional sources of funds are not fully suitable for innovative enterprises and different kinds of financial sources are needed at the different stages of innovation. The amount and type of capital involved depends on the stage and type of the innovation activity and the characteristics of the organization implementing the innovation. With regard to the origin of the sources, the company's and foreign sources can be distinguished, and according to the nature, there are internal and external financial sources. While the internal sources would come only from the profit and the reallocation of the assets, the external sources have different types from shareholders or family loans to venture capitals (Annus et al., 2006). The first risky start-up and seed stages of an innovation cover the initial research and development activities, the development of a product prototype, the initial market research, and the market-reach activities. The personal funds of the founders or of their families and friends represent an important source at these stages. In the early-growth stage, thorough market research, detailed product development, intensive marketing, and commercial activities need to be implemented, and these demand more and more resources and experiences. Usually at this stage, initialized financing resources such as business angels and venture capitals and intercompany ventures enter the scene.

Specialised financial intermediaries, such as business angels and venture capitalists, provide not only financial resources but also managerial expertise and networks as a support for an innovative company. Business angels are individuals that make equity investments in high potential ventures and devote their time and expertise and network to the enterprises. Venture capital means a bigger capital expansion, and in exchange for the high risk they take and the resources they provide, venture capitalists usually receive not only a remarkable portion of the company's ownership in hope of the later exit but also a significant control over the company's decisions. The intercompany venture is a special type of venture capitals, which means a strategic cooperation between the companies in which the bigger companies could informally offer venture type funding for the weakest ones (Annus et al., 2006). With the help of the above mentioned financial resources, the innovative start-up companies receive not only a simple capital investment but also gain a valuable strategic knowledge and network system by which they can make a bigger step forward in the innovation process.

The financing of the early stages of innovative enterprises is difficult for the small and medium sized companies. As they run out of the internal and the direct external financial resources, they are faced with the diminishing financing resources and the deficiency of the capital market. In Hungary the absence of the small amount start-up and seed capital causes a type of financial gap in the financing process (van Osnabrugge and Robinson 2000; Kosztopolosz and Makra 2004). The main problem comes from the different interest systems of the actors and the existing lack of trust and information, ambition for avoiding risk. The enterprises usually hesitate to assign any part of the proportional rights and control to the venture capitalists (Harding 2002; Kosztopolosz and Makra 2005). Figure 2 shows the financial stages of the innovation process and the existing financial gap in the beginning stages.

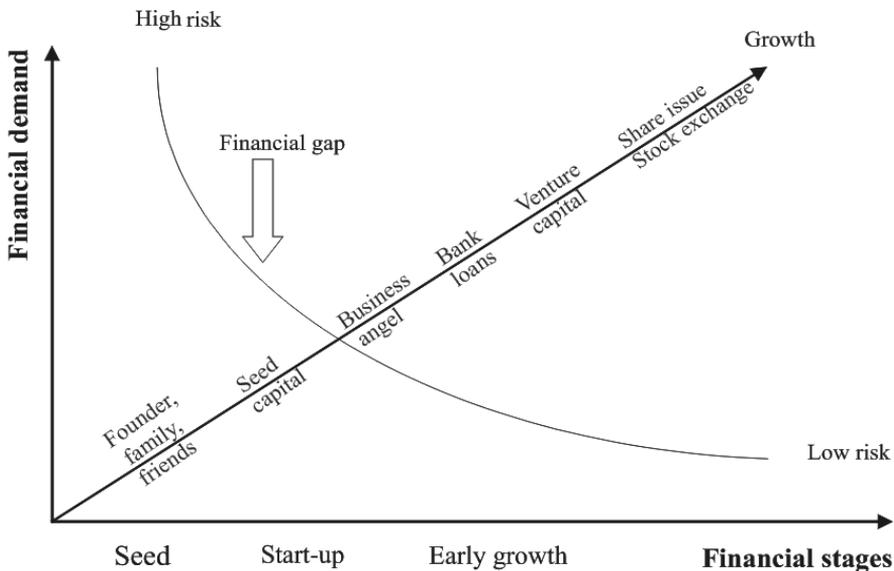


Figure 2 The financial stages of innovation

Source: Guide to Venture Financing in Regional Policy, Centre for Strategy and Evaluation Services, 2002

Finding the appropriate financial instrument could be a serious task for forty-five percent of the innovative companies. Private capital plays an essential role in innovation as it contributes to the supported companies in order to increase the R&D resource capacities and co-operation (Alma Consulting Group, 2011). The start-up stage is one of the most challenging phases of the innovation process. By this time the entrepreneur has exhausted the internal and the easily available external resources, but in order to achieve market expansion significant financial capital market knowledge and relations are needed. This stage is too risky for some types of investors and venture capitals as the market feedback and information is not available yet. In this phase, the different types of networks such as the clusters could provide the solutions. Within the clusters, the start-up enterprises could gain not only the needed capital but also the networking capital and the innovation management experiences.

INNOVATION IN THE SOUTH GREAT PLAIN REGION

The South Great Plain Region is a prominent area among the Hungarian regions in terms of performance in Research and Development activities. The research and development expenditures, the number of R&D establishments, and the number of employed researchers all show that this region is among the favoured regions in Hungary with regards to R&D. (Table 1) The major part of this performance is created in Csongrád County and in the research institutions of Szeged. In terms of R&D expenditures, there is significant difference in the three counties of the region: in Bács-Kiskun County only approximately one-third, while in Békés County they used only one-tenth of the R&D expenditures that was spent in Csongrád County. In terms of the number of researchers and developers, the region ranks second behind Central Hungary (5 773 researchers and developers).

Research activity is the strongest in the field of agriculture, medical-biology, and biotechnology. There are additional research fields which have recently strengthened, such as nanotechnology and material science. Pioneering work has been done in the South Great Plain on utilising renewable energies, which is a good example of the opportunities in practical applications for academic research. The region is also fairly strong in applied sciences in addition to the above mentioned fields, computer engineering and monitoring. (South Great Plain Operational Programme, 2007).

The region has a strong R&D background regarding R&D resources and expenditures. In the region there is a significant spatial concentration of innovative features; the microregion of Szeged and the knowledge centre of Szeged is outstanding, and its knowledge-creating power is significant on a national level as well (Bajmócy et al., 2010). In the analysis of a region's innovation performance, we should also examine the innovative activity of the enterprises. It is a difficult question and a matter of interpretation to specify the definition of the innovation companies. Primarily, we consider a company as an innovative one if it has a significant research and development activity and its innovation results are widely known. According to the last survey of the Central Statistical Office, the proportion of innovative SMEs is approximately 16% in the region (KSH, 2009.) In terms of the innovation cooperation, the enterprises of the South Great Plain Region collaborate mostly with their clients and suppliers, and the rate of cooperation with the academic research centres is relatively low, only 15.6% (KSH, 2009). In 2008, 28% of the enterprises implemented a common innovation activity with partner institutions, which were mostly other companies, research institutes, and universities. In terms of the spatial distribution of the innovation partnerships, these co-operations were mainly carried out within Hungary but were not concentrated in the region (Kerekes et al., 2010).

Overall, the region's innovation strengths are only partly based on the research results and resources of the region. In the region, the rate of cooperation between the business and the academic sectors is very low, and the innovation performance of the enterprises is said to be weak. There is a small number of spin-off companies that can exploit the scientific results of the universities. In our region, knowledge creation and exploitation is spatially separated from each other, so the companies of the region probably do not base their innovation activity on information from academic and research institutions (Bajmócy et al., 2010).

Table 1 Number of research and development units, number of researchers and developers, and the R&D expenditures of research and development units in 2010

Territory	Number of research and development units	Number of researchers and developers	R&D expenditures of research and development units (million HUF)
Central Hungary	1 471	31 291	202 588.6
Central Transdanubia	203	2 731	16 476.9
West Transdanubia	256	3 151	15 532.3
South Transdanubia	203	3 213	7 927.6
North Hungary	191	2 764	11 354.3
North Great Plain	307	5 068	27 320.7
South Great Plain	352	5 773	23 616.5
Bács-Kiskun County	76	1 087	5 962.6
Békés County	30	329	1 561.5
Csongrád County	246	4 357	16 092.4
Total	2 283	53 991	310 210.5

Data source: KSH, 2011

CLUSTERS OF THE SOUTH-GREAT PLAIN REGION

By development of regional economic networks and clusters, the small and medium enterprises with local significance can cooperate with each other and with the research centres and bridging institutions of the region, and by the joint research and development project they can gain a competitive advantage in the global market (South Great Plain Operational Programme, 2007). Due to the governmental subsidy, which was available for the start-up, developing and accredited clusters since 2008 almost fifty clusters have been created in the South Great Plain Region. Most of the clusters were established after 2006 and were funded by the Pole Program as well as other cluster funds. Clusters were usually formed on the basis of previous partnership connections and tender projects. Later on, as funding

sources arose, these forms of cooperation became more widespread by involving different actors.

Regarding the professional fields and locations of the existing clusters of the regions they are supposed to be organized connecting to the traditional industrial activities and the knowledge centres. The first supporting period resulted in the foundation of the clusters in the knowledge intensive industries such as biotechnology, software industry, renewable energy, and in the traditional industries, for example, food industry, construction, mechanical engineering, and textile industry. As the region has notable highlights for tourists, a lot of cooperation between tourism and the spa industry has been established in recent years. Amongst the clusters that were created in the second period there are industries other than knowledge based and innovative, such as environmental technology, communication, safety, and health. By analysing the economic structure and development priorities of the region, the professional fields of the clusters correspond to the most significant economic activities of the region. In most of the clusters, cooperation is strongly present (70%) between universities and enterprises. One of the most significant influences is 'innovation pressure,' which means having an effect especially on the software industry, renewable energy, and biotechnology. In these fields, universities and research institutions play a crucial role not only in forming a cluster but also in generating projects for research and development and innovation.

In terms of the spatial location and concentration, we can see that the clusters of the region are not evenly distributed throughout the area. As it can be seen in Figure 3, in the intensive territorial concentration the knowledge centres and the bigger cities of the region play a significant role. Szeged is outstanding on a regional level because 40% of the clusters have the seat here.

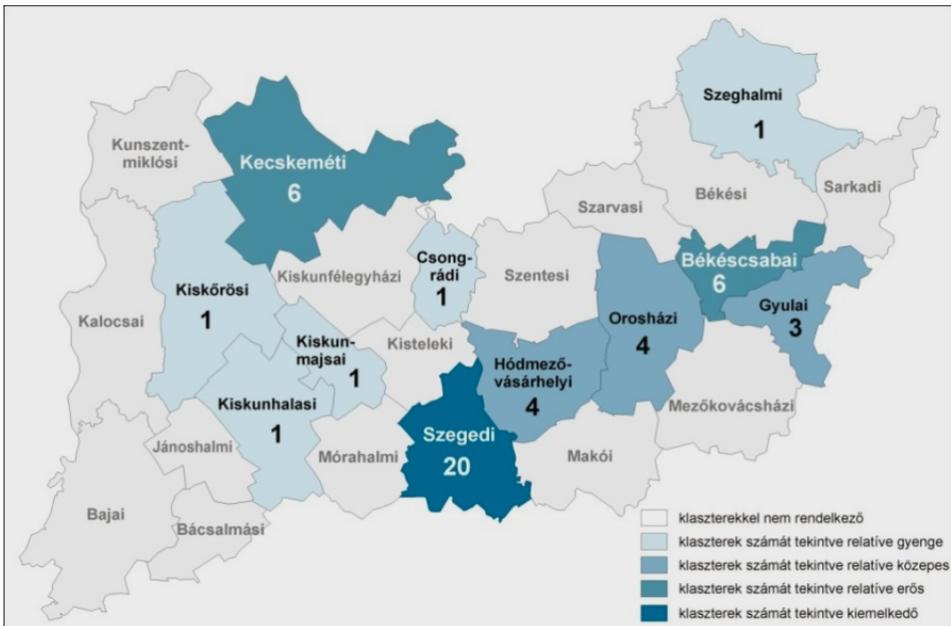


Figure 3 Spatial location of the clusters in the South Great Plain Region

Source: NFÜ database, own construction

INNOVATION ACTIVITIES OF THE CLUSTERS

In the national cluster-development policy, a four-stage model has been worked out to support clusters. According to this, we can classify the clusters as starter, developing, accredited, and pole innovation clusters. For choosing the most innovative clusters, a qualification system was created; according to this, the clusters with formalized cooperation background, joint R&D results and export oriented, innovative activities could gain the title of accreditation. Becoming accredited does not mean direct financial support, but it gives special rights and advantages to the cluster to apply for certain dedicated innovation sources while they are also entitled to some extra points in the project selection and measurement process (Pole Programme Office, 2008). This is that stage in the Hungarian Clusters Development Policy from which we can regard a cluster as a cooperation with significant innovation potential. In the accredited clusters, apart from the national support, it is possible to generate a self-sustainable and competitive operating system based on market cooperation, joint development, and innovative products and services.

The innovation activities of the clusters can be analysed from many aspects. On the one hand, we can measure the innovation capacity of the cluster members while on the other hand, we should evaluate the overall innovation performance of the clusters. In the cluster surveys and the accreditation process, different innovation indicators are applied but only some of them specifically show the interim innovation activities of the cooperation, while others can analyse only the individual R&D activities of the members. The innovation indicators which are involved in the analysis are the followings (MAG Cluster Development Office, 2012):

- R&D expenditures of the cluster members
- Number of employees with PhD titles working for cluster members
- Cluster members participating in EU R&D Framework Programme
- Number of innovation products in the first stage
- Number of industrial property rights and patents
- Ratio of the cluster members' revenues who can claim R&D tax benefits
- Expenditures of joint R&D&I projects
- Number of previous joint R&D&I projects

Péter Keller, the leader of the MAG Cluster Development Office, evaluated the innovation performance of the Hungarian clusters in an in-depth interview, and he considered that some of the Hungarian clusters, particularly the accredited ones, have a very intensive innovation activity. This is also clear from the data because in the 1st priority of the Economic development Operational Programme called R&D and innovation for the competitiveness, 24.4% of the awarded support, 36.4 billion HUF, was connected to the cluster members of the accredited clusters. Regarding the 1st, 2nd and 3rd priorities of the Economic Development Operational Programme, the cluster member companies of the innovative clusters received 10.8% of the support in a value of 53.5 billion HUF.

Hungary currently has seventeen accredited clusters and three of them are located in the South Great Plain Region. The innovation cluster of the region was established in the sectors of energy, biotechnology, and infocommunication technologies. This year the MAG Cluster Development Office conducted a survey about the previous three years of the Hungarian cluster development policy, which was based on the analysis of the accredited clusters. They evaluated the development and the innovation activity of ten clusters, from which three are operating in the South Great Plain Region. These are the followings:

- Archenerg Regional Cluster for Renewable Energy and Building Trade
- Goodwill Biotechnology Cluster
- Software Industry Pole Cluster

In the survey, they analysed three innovation indicators of the clusters, which shows the R&D and innovation activity of the members as well as the networks (Table 2):

- Number of industrial property rights and patents at the cluster members
- Ratio of the cluster members' revenues who can claim R&D tax benefits
- Number of previous joint R&D&I projects

Table 2 Innovation activity of the clusters in the South Great Plain Region in 2010

	Goodwill Biotechnology Cluster	Software Industry Pole Cluster	Archenerg Regional Cluster for Renewable Energy and Building Trade
Number of industrial property rights and patents (2010)	16	14	10
Number of previous joint R&D&I projects	12	11	6
Ratio of the cluster members' revenues who can claim R&D tax benefits (%) (2010)	99.4	42.5	0
Ratio of the cluster members who can claim R&D tax benefits (%)	32	9	0

Source: MAG Cluster Development Office 2012

The clusters involved in the survey had 129 industrial property rights in 2010, from which forty were connected to the South Great Plain Region. In terms of the 3rd priority of the previous Economic and Competitiveness Operational Programme the 1st priority of the Economic Development Operational Programme and the 1.1. Action of the Central Hungary Operational Programme, 29 projects were implemented by the clusters of the region from the clusters' 142 projects. In these applications mainly small and medium sized enterprises were represented. The third indicator shows the R&D tax benefits of the cluster members and compares the total annual revenue of the cluster members who claim R&D tax benefits to the total annual revenue of the cluster members. From this point of view there are two kinds of order among the clusters. On the one hand, there is an order which is based on the ratio of the cluster members' revenues who can claim R&D tax benefits. On the other hand, there is an order based on the ratio of the cluster members who can claim tax benefits. While the Software Industry Pole Cluster had a very good position in both orders, the Archenerg Cluster was the weakest in this sense because none of the forty-four cluster members could claim these kinds of tax benefits (MAG Cluster Development Office, 2012).

The results of another analysis based on the in-depth interviews with seventeen cluster managers and questionnaires filled in by the members in Csongrád and Bács-Kiskun Counties in 2008, point out the less quantifiable but equally important background of the cooperation and innovation activities in the clusters. As the most important activities of the analysed clusters, information transfer, generation of joint projects, and common presence on the market were identified. The main advantage of the clusters lies in that the competing and at the same time cooperating companies share or together gain market information,

which gives them a competitive edge. The companies involved in the study are willing to share information as 96.9% of the ones that were interviewed said that they share their own knowledge and information about their activities with their cluster members.

With regard to the innovation activity, the cooperation between universities, research institutions, and enterprises create the most significant type of internal cluster cooperation. The cooperation between universities and companies is often hindered by the different objectives of participants as well as the differences in their financial situation. In most of the clusters of the South Great Plain Region, cooperation is strongly present (70%) between universities and enterprises. One of the most significant influences is 'innovation pressure' which means having an effect especially on the software industry, renewable energy, and biotechnology. In these fields, universities and research institutions play a crucial role not only in forming a cluster but also in generating projects for research and development and innovation. In many cases, even before a cluster was established there was a well-functioning cooperation among the partners such as certain universities, spin-off companies, and the core membership of the cluster.

Innovation might play an important role in strengthening the competitiveness of cluster members. Cluster managers were interviewed about their assets and means to enhance innovative activity. Fifty-three percent of the clusters have such services, 16% of them are forced by the market to implement changes, but they have no such special services, while 31.3% of them do not consider it as relevant since they perform no innovation activity. In the analysed clusters, the activities that enhance innovation activity were introducing new technologies and best practices, providing information about innovation supports, and organising innovation events together.

CONCLUSIONS

Innovation has an important role in the economic development policies, not only in the South Great Plain Region, but in all of Hungary. The high-level and internationally accepted research and development as well as the adopted knowledge and innovation in the market condition could be the break-out point of the development of this area. Even though the appropriate knowledge-base and innovation background is available, the market utilization of the knowledge is insufficient. The role of the innovative small and medium sized enterprises has been revalued, but their market position is more difficult due to the financial conditions created by the economic crisis. During these times we should put special emphasis on alternative development and financing solutions which are able to support the spread of innovation.

The cluster based economic development has been increasingly supported in recent years, and due to this, high-level knowledge intensive clusters have been created which could lead to long-term economic cooperation. In these clusters, more and more small and medium sized enterprises play an important role in innovation. In the cluster cooperation, not only do the knowledge generating and knowledge utilizing organizations find connecting points, but the innovative SMEs can be given a supporting incubation environment. The cooperating institutions, in addition to participating in joint development and applications, also share their most important market information, experiences, relation networks, and financial resources, and by doing so, they help each other and promote the innovative activities of their cluster in general. Even if the clusters cannot provide an institutional solution for filling the gap in the financing of innovation, they may have great importance in getting some innovating idea or enterprise over the plateau which may exist between an expensive innovative idea and a successful and marketable innovation product. This is the engine of economic development.

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