

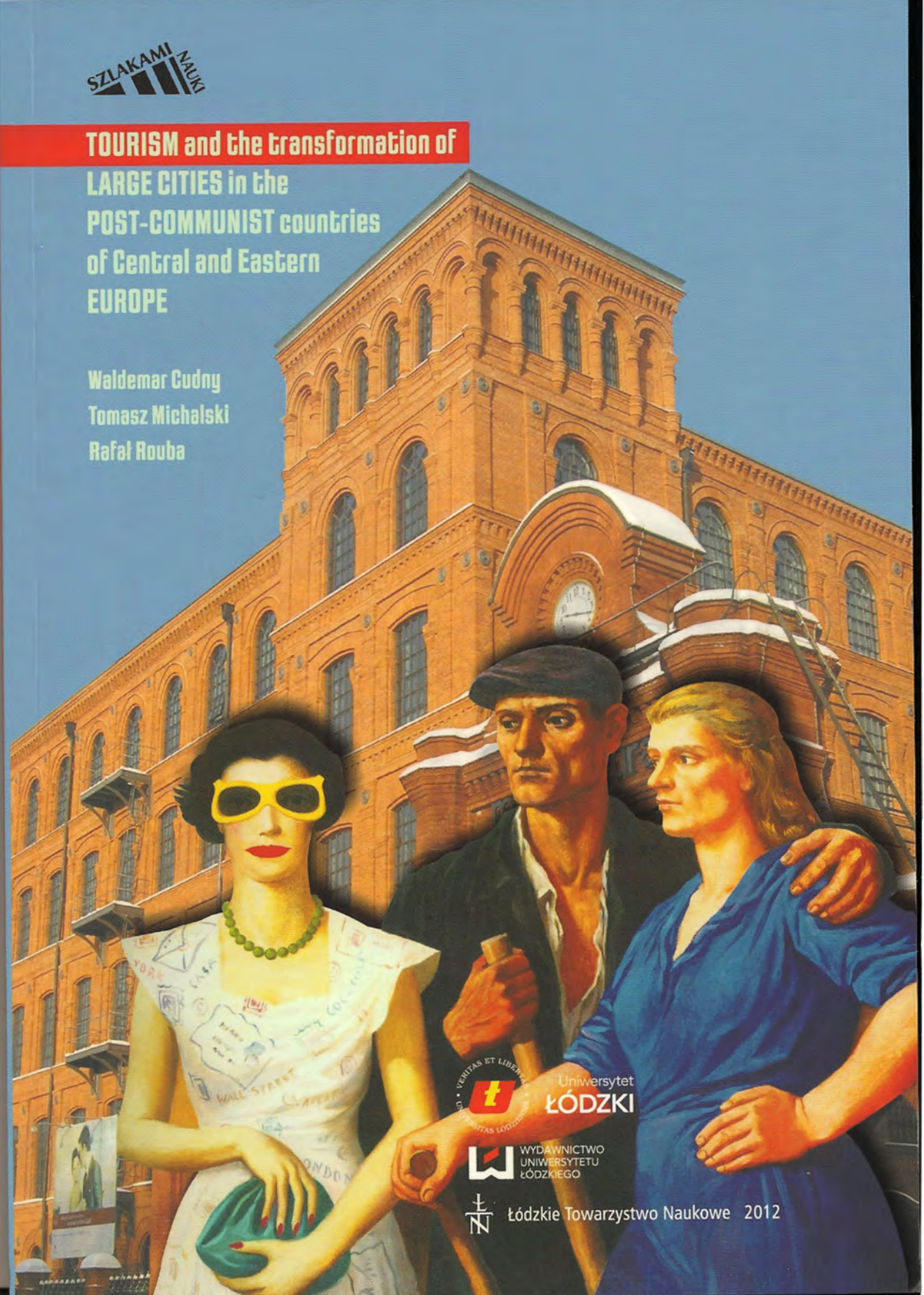
**TOURISM and the transformation of
LARGE CITIES in the
POST-COMMUNIST countries
of Central and Eastern
EUROPE**

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After 1989, in Lodz, a genuine international airport was built, as well as a network of roads and motorways surrounding the city. The accommodation infrastructure was greatly enlarged by new hotels, including some high standard ones. Two large hotels are currently being built – the Hilton and the Accor Novotel. The gastronomic and complementary infrastructure has expanded as well. Flagship investments include the Atlas Arena sports hall (the largest facility of this type in Poland) and the Fala pools – the largest in Lodz.

Strategic development projects have been implemented and tourism plays a vital role in them. It is to be one of the elements which will replace industrial activity, reduced due to the deindustrialization processes. One of the most important strategic development goals is to strengthen the cultural and entertainment function of the city. This is being done by supporting the organization of festivals and other types of events by the city authorities. It is regrettable that the effects of this precious initiative have been partly destroyed due to the acute conflicts between the city authorities and the organizers of some festivals.

Despite the fluctuations of the tourist traffic, the recent years (2003-2010) have brought a stable, gradual increase in the number of tourists staying in Lodz overnight. We may presume then that the activity of both, private investors and city authorities, as well as both these groups jointly, brings positive results as regards tourism. If such policy is continued and the planned investments carried out, the tourist function may help Lodz to overcome the socio-economic crisis, which the city has been suffering from since the beginning of the transformation period.

4. Bratislava – Slovakia

4.1. The location of the city

Bratislava can be viewed as a city of a unique geographical, morphological, economic and socio-demographic structure. In 1990, a two-tier model of city government was adopted, with 17 self-governing lower level local administrative units (NUTS V or LAU 2), and one self-governing body at the upper level of the local government. Following the territorial-administrative reorganisation of state administration in the mid-1990's (Acts No. 221/1996 and 222/1996), 5 territorial units at district level (NUTS IV or LAU 1) were established, each with its own District Office. According to the same legislation, a territorial unit at the meso-level was established – the Bratislavský region, combining the territory of Bratislava and the territories of the neighbouring districts of Malacky, Pezinok and Senec (represented by the Regional Office). Due to the administrative reforms and decentralisation, the districts and regions lost their state administration functions in favour of self-government (2004 and 2007, respectively). Currently, districts as territorial units function only as statistical units at the NUTS IV level. Despite abolishing the general state administration at the regional level, the Bratislavský region remains important as a statistical unit at the NUTS III and NUTS II level, (one of eight in Slovakia). Statistically, a very interesting, not to say extraordinary situation has developed on the territory of Bratislava. The city of Bratislava as such is not presented as a separate statistical unit in the NUTS I to NUTS V hierarchy. Seventeen city districts represent NUTS V units and five other districts represent NUTS IV units. However, NUTS III and NUTS II levels are represented by the territory of Bratislava and three surrounding districts: Malacky, Pezinok and Senec. This situation generates a whole range of paradoxes and unclear interpretations while evaluating the social and economic development of the regions in Slovakia (i.e. by NUTS levels).

The total area of the city is 367.6 km², it has 432,060 inhabitants and the population density of 1175 inhabitants per 1 km² (2010).

The location of the city is an important tourism development factor. Bratislava is located in the middle of Europe. Four large natural geological units meet in the area surrounding the city – the Alps, the Carpathian Mountains and the lowlands of the Pannonian and the Vienna basins. This fact is of vital importance as regards the origin of the first settlements on the

territory of the city, its development in the Middle Ages, as well as in the times of railway development in the 19th century, or motorway network construction in the previous decades. The Alps and the Carpathians have always been huge barriers, complicating transport in Europe. Bratislava has been a natural road junction since very early times. Roads running from Eastern, South-eastern and Southern Europe met here with the roads leading to the west, north-west and north of the continent. In the early settlement period, as well as later, an important role was played by the River Danube. It was not only a natural waterway, but the local fords allowed people to cross the water and maintain contacts between the left and the right side of the river as well (Korec, Galasová 1994).

From the point of view of cultural geography, the natural conditions described above are important for Bratislava for three reasons. Firstly, the city territory is where the western and eastern cultures meet. As a result, different „cultural worlds“ have been confronted and co-existed here throughout the history. The “iron curtain” that divided the communist and the capitalist world in 1948-1989 is the best example of such a confrontation. Tourists from the “capitalist world” were practically absent during that period. On the other hand, the development after 1989 is a good example of co-operation. Bratislava became a truly European city, both politically and economically. It enjoyed the effect of having the “gateway location” between Western and Eastern Europe, which had a positive influence on its economy. It resulted in a rising number of direct business contacts and rapidly developing international tourism in the city.



Map 4.1. The location of Bratislava in Slovakia and Central Europe

Source: P. Korec

Secondly, Bratislava has always greatly benefited from the close proximity of two important political, economic and cultural European centres – Vienna and Budapest. For example, it rapidly developed when it had become the capital of Hungary and the coronation city of Hungarian kings after conquering Buda by Turks in 1536. Currently, we may observe some positive effects of the flourishing economic and cultural relations between Bratislava and Vienna. The Vienna – Bratislava (- Budapest) region aspires to be the heart of the east-central part of Europe. Thanks to the existing transport infrastructure, Bratislava is favourably located in relation to the Czech Republic, which shows in the large number of Czech tourists visiting the city.

Thirdly, the extreme location of Bratislava in relation to the rest of the Slovak territory is also an important feature in terms of cultural geography. The city is situated on the south-western edge of the country. Its western border is at the same time the state border with Austria. Despite this eccentricity, Bratislava has maintained the position of the main political, economic and cultural centre of Slovakia for a long time. The location makes the city an essential transit area between Slovakia and Western Europe, which requires not only adequate transport infrastructure, but also properly organized services and trade. This fact bears on the tourism development in the city.

4.2. Transport accessibility

Due to its location, Bratislava is an easily accessible, important transport crossing point in Central Europe. Lines of the five basic transport modes (road, railway, air, river transport and pipelines) converge close to the city centre. Bratislava's development was stimulated by the delineation of Pan-European multimodal transport corridors in the 1990's. Three of them cross the city territory. Corridor IV runs through Berlin/Nuremberg – Prague – Bratislava – Budapest – Constanta – Thessalonica – Istanbul, branch A of corridor V traverses Bratislava – Žilina – Košice – Uzhgorod – Lviv, and corridor VII is the River Danube.

Road transport. Tourism-wise, it is a vital fact that Bratislava is an important junction of the following motorways: D1 - Bratislava – Žilina (– Ostrava-Katowice) – Košice (running further to Ukraine and Hungary), D2 - Brno – Bratislava – Prague, as well as Bratislava – Vienna motorway and D4 - Bratislava – Parndorf (– Rajka – Győr – Budapest). They meet in the city, not far from the city centre. The D1 is a part of the European road network known as E-75, and the D2 is at the same time a section of the E-65 road. It is a positive fact that the motorway distance to the major metropolitan areas of Central Europe is very short (60 km to Vienna, 190 km

to Budapest and 300 km to Prague). An interesting aspect of the intersection of motorways on the territory of Bratislava is the fact that a part of the motorway is included in the central ring road. As a result, the area around the motorway junction in the city has become very attractive, not only because of its shopping malls and services, but also because various business companies are based there.

Air transport. Air transport is a very important tourism development factor. M. R. Štefánik airport is the largest airport in the Slovak Republic. It is an international airport of strategic importance. It has two runways with concrete surface (04/22–2090x60 m, 13/31–2950x45 m). Runway 13/31 underwent reconstruction in 1997, when it was extended to the total length of 3,190 metres. Considering the quickly growing number of passengers travelling via Bratislava after 2000, the limited capacity of the airport became a serious problem. It was decided to reconstruct the airport and include a new terminal. It was opened in 2010 and the airport passenger capacity increased from the original 2.6 million to 3.5 million per year. Following the completion of the new terminal in summer 2012, the total airport capacity increased to 5 million passengers.

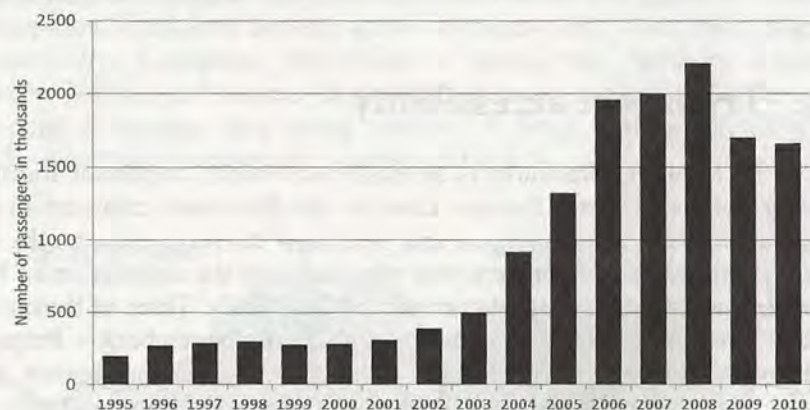


Figure 4.1. The number of passengers at M.R. Štefánik Airport in Bratislava

Source: Statistical Yearbook of Bratislava – the SR capital, 1996-2011

As shown in Figure 4.1., low-cost airlines that started to operate after the year 2000 accelerated the development of the Bratislava airport. The number of passengers increased from 500 thousand to more than 2.2 million over the period of five years (2003-2008). However, the low-cost airline SkyEurope went bankrupt in 2009 and most of its routes were taken over by its quickly expanding competitor, Ryanair (to a limited extent). The

decrease in the number of passengers after 2008 was caused by the economic crisis. Many Slovaks lost their jobs in Great Britain and Ireland. That was also the reason why the popularity of spending the “city-break” weekends in Bratislava decreased. A smaller interest in spending holidays abroad resulted in a smaller number of charter flights after 2008. All in all, the demand for air transport dropped considerably. The Bratislava Airport faces a strong competition from the Vienna Schwechat, which is situated less than 50 km from Bratislava. Although the M.R. Štefánik Airport cannot compete with the Vienna Schwechat Airport in terms of capacity (the number of passengers in Schwechat amounts to about 25 million a year) and offer (a much larger number of destinations), it is still possible to attract less affluent passengers from the neighbouring East Central European regions to the Bratislava Airport thanks to lower prices for airport services and cheaper flights.

The proximity of the Austrian airport in Schwechat can also be seen as positive, if we consider tourism development in Bratislava. The very good accessibility of this airport from Bratislava (45 minutes by car, 60 minutes by regular bus transport) means that Bratislava is very well connected by direct flights with destinations all over the world. The operator of the Bratislava Airport is „Letisko M.R. Štefánika – Airport Bratislava a.s.“. It is owned by the National Property Fund of the Slovak Republic (64% of shares) and Ministry of Transport, Construction and Regional Development of the Slovak Republic (36% of shares) (Hornák, 2008).

Railway transport. Bratislava is an important railway node, where six railway directions intersect: Kúty (- Břeclav – Brno – Prague - Berlin), - Trnava (- Žilina - Košice), - Galanta (- Nové Zámky – Štúrovo - Budapest), - Dunajská Streda (- Komárno), - Rajka (- Győr, Hungary) and - Marchegg/Kitsee (- Vienna, Austria). An important contribution to the tourism development in Bratislava in 1998 was the renewal of the railway line connecting the city with Vienna, and running through the Bratislava-Petržalka railway station. Two railway lines are important for the international tourism of Bratislava. The first one runs towards Kúty (or Břeclav), from where you travel to Ostrava, Katowice and Warsaw. The other one runs in the direction of Galanta – Nové Zámky (and further, to Budapest, Bucharest Sofia, Belgrade and the remaining Balkan countries). The railway line running towards Trnava, Žilina and Košice is the most important domestic line. It links Bratislava with the densely populated region of the Váh River valley (“Považie” region), as well as with Košice and whole Eastern Slovakia.



Map 4.2. Motorway and railway network on the territory of Bratislava

Source: P. Korec

The decrease in the railway transport to and from Bratislava has been observed since the mid-1990's. The leading role in passenger transport has been taken over by road transport, represented mostly by individual car transport. Since 2007, the TEN-T project (Trans European Network for Transport) is being developed, focusing on the improvement of the operational abilities and integration of Bratislava into the European high-speed railway network, on the Paris – Strasbourg – Stuttgart – Vienna – Bratislava/Budapest axis. The inclusion of the Bratislava Airport into the railway network is a part of the project (Horňák 2008).

Apart from integrating the city into the European high-speed railway network, it will provide other benefits for the city as well. A tunnel under the Danube River (which should be a part of the project) was to link the district of Bratislava-Petržalka on the right bank of the river with the rest of the city on the left bank. The TEN-T project in Bratislava is managed by the Slovak

Republic Railways (state-owned) and co-financed by the EU. It should be implemented in 2011-2015, but it is delayed and constantly disputed, facing uncertain future and possible changes.

4.3. The history of the city

The oldest evidence of settlement on the territory of today's Bratislava is brought by archaeological research. Bratislava's original natural environment offered very favourable conditions for settlement. A territory lying on a big river, consisting of a combination of lowlands and low mountains, was a perfect area to settle down. It provided a sufficient amount of wood, wild life for hunting and fishing, water, as well as fertile soil. The earliest confirmed settlements date back to the times of pre-historical hunters and stone-age gatherers. A group of small villages were established there, because of the suitable terrain and the intersection of important transport routes. However, more substantial physical evidence of permanent settlement on the Bratislava territory, showing signs of agriculture and crafts, comes only from the Neolithic period. Archaeological findings in more elevated locations include pottery representing a variety of cultures (Linear Pottery, Lengyel, Eneolithic Baden, and early iron-age Kalenderberg culture).

From Great Moravia to the fall of communism

Bratislava played an important role during the period of Great Moravia in the 9th c. It was one of three main centres of this historical Slavic political unit, considered usually as the first united state of old Slovaks, Czechs and Moravians. The hill-fort built on the Danube River served as the foundation of the city. Apart from the defensive function, this fortified Great Moravian hill-fort performed religious and trading functions. It had densely populated hinterland, consisting of farming, fishing and trading settlements. It seems that the territory of today's Bratislava was developing incessantly, also after the victory of Magyars in the 10th century. The basic factor of Bratislava historical urban development was the small roads merging into the Danube River fords. The early settlement transformed later into a township. An Arabian geographer Al-Idrisi described Bratislava in the 12th century as a "middle-sized city with numerous stone houses built side by side" (Horváth 1990). The ground plan of the city remained virtually the same during the later period, although the development temporarily stopped due to the Tatar invasion in 1241.

The economic development established the role of Bratislava as the capital of Hungary and the coronation city of Hungarian kings in 1536-1824. It was when the first compact housing appeared, with a real city centre and luxurious palaces. Influential representatives of nobility built architecturally valuable city palaces, which are now included in the historical city centre. At present, many of them perform the role of museums and galleries, and they are frequently visited by tourists. The baroque style is represented by Jesenák, Keglevich, Esterházy and Pálffy palaces. Balassa, Apponyi, Erdődy, Kutscherfeld and Mirbach palaces were built in the rococo style, while de Pauli, Zichy and Primatial palaces – in classical style. First manufactures, mostly textile, were established in the 18th century.



Photo 4.1 The Main Square, the heart of the old city

Photo: P. Korec

Bratislava revived economically thanks to modern railway and the industry expansion in the second half of the 19th century. New industrial areas were built close to the city centre. A factory producing cables and insulation pipes was opened in 1894, the “Apollo” oil refinery – in 1895, Stollwerck – the biggest chocolate factory in Hungary at that time, and the Sphinx kitchenware factory were launched in 1896. A new urban segment – the garden city with eclectic villas, started to grow to the west of the historical centre. The garden city spread practically over the entire western part of today’s Staré Mesto (Old Town) later in the 20th c.

The construction of large housing estates made the most significant change in the urban spatial structure during the communist period of 1948-1989. Undoubtedly, the most extensive housing construction took place towards the end of this period. The large housing estate Ružinov, with about 15,000 apartments, was built in 1960-1968. In search for a new housing development location, construction activities started in the western parts of the city, in the valleys of the Malé Karpaty Mountains (the districts of Karlova Ves, Dúbravka, and Lamač). Later, housing construction shifted to the right bank of the Danube River. Here, in the district of Petržalka, the largest housing state in Slovakia was built between 1971 and 1991, with the remarkable number of 40,000 apartments. The industry was also developing rapidly during that period – there was a large petrochemical plant Slovnaft, located near the southeast border of the city, and a car factory in the north-western district of Devínska Nová Ves. The latter (in Slovak – *Bratislavské automobilové závody*) became an important part of the urban structure of Bratislava after it had been taken over by a foreign investor (Volkswagen) soon after 1989.

4.4. Post-socialist urban transformation

From the methodological point of view, there are some periods in the history of the city when it is better to speak about a transformation of its urban structure rather than about its development (Korec 2002). In the case of post-socialist cities, such a period is the time right after 1989. Over the past twenty years, there have been four processes that caused the transformation of the urban structure of Bratislava: the political and social transformation of the society (i), the internationalization of the economy (ii), a societal shift from the industrial to the post-industrial phase of development (iii), and obtaining the status of the capital city of an independent state (iv). An important fact is that all these processes were very favourable for the transformation of the urban structure of Bratislava and still have extremely good effects on the socio-economic development of the whole region of Bratislava.

The fundamental changes in the economic base of Bratislava are presented in Table 4.1. The year 1985 can be regarded as the year when socialism culminated in Slovakia, and 2006 as the year in which the transformation process finished. The total number of working people in Bratislava increased from 279,122 in 1985 to 354,372 in 2006 (by about 75,250). Considering the fact that the number of the unemployed in Slovakia increased from zero in 1985 to almost 400,000 in 2006, the increase in the employment opportunities in Bratislava seems interesting. The percentage of

non-industrial activity in the occupational structure of the city, growing from 54.90% in 1985 to 81.07% in 2006, clearly shows that Bratislava changed from an industrial city to a city offering a wide range of services. The percentage of industry workers in Bratislava decreased from 26.45% in 1985 to 13.29% in 2006. In spite of this, in three industries the job opportunities increased (in publishing and printing from 2,835 to 4,583, in food processing – from 4,477 to 8,123 and in car industry – from 2,045 to 8,719). The industry in Bratislava, with its Volkswagen Slovakia car factory, petrochemical plant of Slovnaft, food factories and printing and publishing activity, will undergo specialization in the future. The service sector employed 287,282 people in 2006, compared to 153,251 in 1985. The financial sector was one of the most important sectors undergoing transformation in the city. Its influence was manifold. The sector of financial intermediation recorded a remarkable increase in employment, from 0.70% in 1985 to 5.21% in 2006 (from 1,956 to 18,452 employees, respectively). The percentage of employment in wholesale and retail trade rose from 11.14% in 1985 to 20.08% in 2006, and in the real estate, business and R&D - from 9.46% in 1985 to 18.96% in 2006, etc. (Korec, Ondoš 2009).

The changes in the construction industry after 1989 included the development of family „villas” and high standard apartment houses for people of a higher social status. They have appeared especially to the west of the city centre, on the slopes of the Malé Karpaty Mountains, as well as in selected areas of the inner city. The development of high standard villas and apartment houses co-occurs with the escalation of other problems related to the urban spatial structure. Firstly, it is the unreasonable increase in the built-up area density. The second problem is related to the substantial reduction of green spaces in the city, such as parks and gardens. Valuable natural green areas that survived decades of socialist urbanisation are under serious pressure generated by strong market forces at present. The third problem is related to the previous one. It is the expansion of built-up areas at the expense of the Male Karpaty mountain forest. The fourth problem is the lack of respect for the architecture of the already existing built-up areas, leading to the construction of ugly, heterogeneous fragments of the city. The last problem is the underestimation of the role of transport. It is perhaps a slight exaggeration, but we can conclude that the development of villas and high standard apartment houses generates a “boomerang” effect – one of the priorities in the new housing development is a very good living environment – a lot of green spaces, low housing density, silence, little traffic, interesting architecture, etc. However, paradoxically, the new development works against all these advantages.

Table 4.1. Employment by economic activity in Bratislava in 1985, 1998 and 2006

Economic activity	1985		1998		2006	
	number	%	number	%	number	%
Agriculture, forestry, fishing	5 505	1.97	1 762	0.57	1 584	0.45
Manufacturing	73 818	26.45	48 827	15.89	47 109	13.29
Construction	46 548	16.68	24 513	7.98	18 397	5.19
<i>Production activities total</i>	<i>125 871</i>	<i>45.1</i>	<i>75 102</i>	<i>24.44</i>	<i>67 090</i>	<i>18.93</i>
Wholesale and retail trade	31 103	11.14	56 105	18.26	71 147	20.08
Hotels and restaurants	4 218	1.51	6 361	2.07	7 950	2.24
Transport, storage, communication	24 892	8.92	31 041	10.1	29 628	8.36
Financial intermediation	1 956	0.7	13 900	4.52	18 452	5.21
Real estate, business, R&D	26 411	9.46	47 682	15.52	67 187	18.96
Public administration, social security	9 851	3.53	18 174	5.91	32 253	9.1
Education	23 776	8.52	24 705	8.04	22 105	6.24
Health and social work	15 078	5.4	17 559	5.71	20 073	5.66
Other community, social services	15 966	5.72	16 629	5.41	18 487	5.22
<i>Non-production activities total</i>	<i>153 251</i>	<i>54.9</i>	<i>232 156</i>	<i>75.56</i>	<i>287 282</i>	<i>81.07</i>
Economic activities total	279 122	100	307 258	100	354 372	100

Source: Statistical Yearbook of Bratislava - the SR capital. Urban Report SPE, Bratislava 1986. Statistical Yearbook of Bratislava - the SR capital. SPE Regional Report, Bratislava 1999. Statistical Yearbook of Bratislava - the SR capital. SR Statistical Office, Bratislava 2007

After 1989, we could observe intensive commercialisation and functional fragmentation of the originally mono-functional large socialist housing estates. The market and private entrepreneurship became strong factors of urban spatial structure development. Huge shopping centres, hypermarkets, supermarkets and other large shops, car dealers' salons, petrol stations, wholesale and logistics centres and office buildings were very naturally and quickly appearing at attractive locations. The large socialist housing estates contained attractive and free open “spatial reserves”, green areas, parking lots and other spaces, which were not heavily used, and which later became spaces of post-socialist commercialisation. Investments increased the density of the built-up areas, especially by constructing multi-functional buildings. The functional diversification was based on the

development of commercial activity. An exception was the development of sacral buildings, which also competed for post-socialist urban space.

4.5. Changes influencing the development of tourism after 1989

The transformation of tourism infrastructure

Tourism infrastructure changed substantially during the transformation period in Bratislava. Far-reaching changes took place in accommodation and catering, there appeared congress spaces that had been only very rarely offered before 1990. Numerous sports and leisure facilities were built, which also influenced the development of tourism in Bratislava. Apart from the official data concerning tourism, provided by the Statistical Office of Slovak Republic (in some cases not very reliable), the authors use their own specialised long-term databases, systematically covering the hotel network in Bratislava.

Accommodation facilities are the most characteristic part of tourism infrastructure. In Bratislava, they underwent substantial quantitative and qualitative changes during the transformation period. One of the basic changes is an increase in accommodation capacity. While there had been only 19 accommodation facilities with the total capacity of less than 4,000 beds in 1990, in 2010 the number rose to 113, with the total capacity exceeding 14,000 beds (source: the Statistical Office of the Slovak Republic). This means 5.5 times more facilities and 3.5 times more beds (Figure 4.2). The less dynamic increase in the accommodation capacity compared to the number of accommodation facilities partly resulted from the modernisation of older hotels. They raised their standard and reduced the number of beds. For example, The Bratislava Hotel, the largest hotel in the city, had more than 900 beds in 1990, while now, after reconstruction, it has about 600 beds in 270 rooms (the name of the hotel was changed to The Bratislava City Hotel). Apart from that, the slower increase in the number of beds was the result of opening a large number of smaller accommodation facilities, such as guest houses, in the first half of the 1990's. Nevertheless, there were only 14 such accommodation facilities, with about 400 beds in 2010 (source: the Statistical Office of the Slovak Republic). Private tourist accommodation developed as well, although we do not have reliable data concerning this segment. We must also mention here the appearance of new, small hotels.

There are three periods in the development of the Bratislava accommodation facilities network in 1989-2010 (Figure 4.2):

- the formation and development of the private sector in the first half of the 1990's (1990-1996),
- stagnation at the turn of the centuries (1997-2002),
- qualitative and quantitative changes in the first decade of the new millennium (2003-2010).

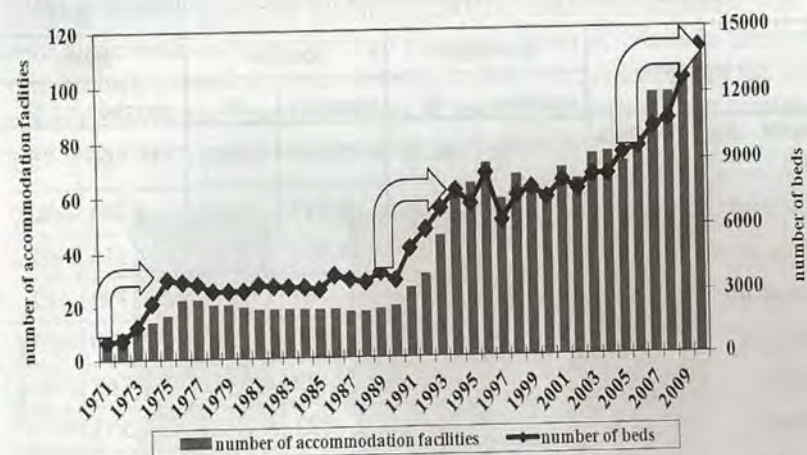


Figure 4.2. The number and capacity of accommodation facilities in Bratislava
Source: Statistical Yearbook of Bratislava – the SR capital, 1973-1989. Urban Report SPE, 1974-1990; Statistical Yearbook of Bratislava – the SR capital, 1993-2010. SR Statistical Office 1994-2011

In the first half of the 1990's, the number of privately owned accommodation facilities, especially hotels, rapidly increased, from 15 in 1989 to 38 in 1996 (Bučeková 1999). This increase concerned especially small private facilities, such as family guest houses and hotels. It was also typical of that period to turn old facilities, originally workers' hotels, into regular hotels (the Niva, Astra, Turist, Avion, Plus, Baronka Hotels, etc.). This process substantially increased the accommodation capacity in Bratislava. The number of accommodation facilities did not change significantly in 1997-2002. We can describe this period as stagnation in the development of the accommodation network in Bratislava. The few new hotels in fact only replaced those that had remained closed since the first half of the 1990's (Bučeková 2007).

The most impressive changes in the Bratislava accommodation facilities network took place in 2003-2010. That period was marked by significant quantitative and qualitative changes, especially in the hotel network, with 43 new, more comfortable hotels. It means that as regards the

level of comfort and services, the structure of the hotel network changed considerably. More foreign hotel chains finally appeared on the hotel market of Bratislava. They were completely missing in Slovakia before 1989, and in the early transformation period their penetration into the Slovakian hotel industry was more cautious and slower than in the neighbouring countries.

Table 4.2. The structure of accommodation facilities in Bratislava in 2010

Category	Facilities		Rooms		Beds	
	number	%	number	%	number	%
Hotels and motels total	70	61.95	5 096	76.63	10 566	75.12
Four and five stars	24	21.24	2 174	32.69	4 224	30.03
Three stars	32	28.32	1 953	29.37	4 115	29.25
Two stars	10	8.85	781	11.74	1 799	12.79
One star	4	3.54	188	2.83	430	3.06
Hotels	3	2.65	83	1.25	162	1.15
Hostels	6	5.31	223	3.35	533	3.79
Guest houses	14	12.39	162	2.44	422	3.00
Campsites and other	19	16.81	1 016	15.28	2 121	15.08
Total	113	100.00	6 650	100.00	14 066	100.00

Source: Statistical Yearbook of Bratislava – the SR capital, 2011. SR Statistical Office, 2012

In 1996, there were no five-star and only two four-star hotels in Bratislava, which made merely about 5% of the total number of 38 hotels. In contrast, in 2010, over 40% of the total of 84 hotels were four- and five-star hotels (according to the authors' own hotel database, Figure 4.3). With one exception (the two-star Prim Hotel), since 2002, all the newly opened hotels in Bratislava have been three- to five-star hotels. After the long absence of five-star hotels, the first one in this category was opened in 2007 (the Arcadia Hotel). Two large five-star hotels (the Sheraton and the Kempinski River Park) were opened by the end of 2010, which meant that currently there are already 5 five-star hotels in Bratislava. The two five-star hotels mentioned above, substantially increased the percentage of this hotel category in the total number of rooms and beds in Bratislava hotels.

Bratislava hotels have greatly improved the quality of the business services they provide (secretarial services, business rooms, business centres), due to the fact that for a long time the predominant group of visitors in the capital city have been business tourists. The hotels have also improved their

wellness, fitness and relaxation services in the effort to motivate the visitors to prolong their stay. Many hotels underwent large scale reconstructions in order to build congress spaces. The largest are offered by two four-star hotels: the NH Gate One (480 seats in the auditorium) and the Holiday Inn (450 seats). However, the largest number of meeting and conference rooms are available at the Crowne Plaza Hotel. Bratislava is still lacking a large hotel suitable for conferences hosting 1000 or more participants. The only suitable place with sufficiently large capacity for such events is the Incheba Expo exhibition centre. A major drawback, however, is that there are not any large and comfortable congress hotels in the neighbourhood, so conferences are held here rarely and in co-operation with other hotels.

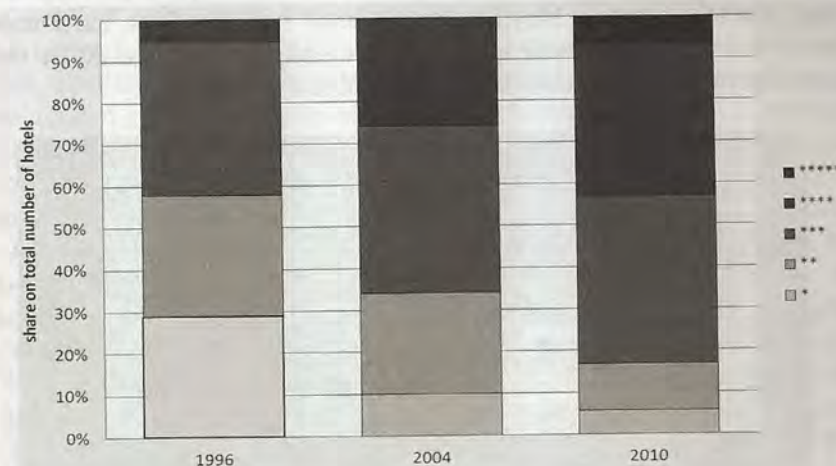


Figure 4.3. The development of hotel structure in Bratislava by the level of comfort

Source: Authors' compilation

Cities in the neighbouring countries are incomparably much better equipped as regards conference centres, and are strong competition for Bratislava. For example, there is the Vienna Austria Center, with the total capacity of about 15,000 participants. In Prague, there is the Prague Congress Centre, with the total capacity of over 9,000 places (there are about 20 conference halls and 50 meeting lounges with the capacity of 12 to 2700 places), directly linked to The Holiday Inn Prague Congress Centre hotel (not mentioning other hotels in the neighbourhood, such as The Corinthia Hotel in Prague). Two large congress centres are functioning in Budapest – the Budapest Congress & World Trade Center and the Budapest Europe Hotel & Congress Center. The former is suitable for congresses with about 2000 participants and is directly linked to the Accor hotels. The lower position of

Bratislava in comparison to other capitals shows in the number of conferences held in individual European cities (according to ICCA 2012, 2009). While Vienna and Budapest are among the first ten cities (Vienna is the European leader), Prague occupies the 11th-12th, and Warsaw the 15th place, Bratislava is far behind them, holding the 110th-120th place in 2011 (in 2008 it was 202nd-233rd place).

Some changes were also observed as regarded foreign hotel chains in Bratislava during the post-socialist transformation period. There was only one foreign hotel in 1989 – the Forum Hotel, now Crowne Plaza belonging to the InterContinental hotel group. Despite the fact that the number of hotels in the city significantly increased in the first half of the 1990's, only one foreign hotel was opened at that time. It was the Danube Hotel, belonging to a small French network, Meydan Hotels (now it is the Park Inn Danube Hotel of the Carlson/Rezidor hotel corporation). However, in 2003, there were already five hotels belonging to international hotel chains.



Photo 4.2. Hotels and restaurants on the Danube River

Photo: P. Korec

Besides two hotels mentioned above, they included the Holiday Inn Hotel (at the time of its opening it belonged to the Holiday Inn Worldwide; today the

Holiday Inn hotels belong to the world largest hotel corporation – InterContinental), the West Hotel (a part of the Best Western hotel chain) and the Radisson Blu Carlton Hotel (belonging to the Carlson/Rezidor hotel group), opened after a complete reconstruction. By 2010, the number of Bratislava hotels included into smaller or larger multinational hotel chains had increased to 16. Nevertheless, their position is still weaker in comparison to the largest cities in the neighbouring countries. There are only nine hotels belonging to five of the ten largest hotel corporations. In contrast, there are nine corporations with 34 hotels in Prague, eight with 33 hotels in Budapest, and seven with 21 hotels in Warsaw (2010).

The development of the catering facilities network

The network of catering services in Bratislava changed significantly after 1989, similarly to the accommodation facilities. The quantitative increase was related to the rapid development of private ownership in the early 1990's. Three new phenomena could be observed in Bratislava: the quick expansion of private entrepreneurship (i), the emergence of new types of restaurants (ii), and penetration of foreign capital into this sector of economic activity (iii). Catering facilities that existed in Bratislava in 1989 were mostly privatised in the process of so called "small privatisation". The first McDonald's restaurant was opened in Bratislava in 1996, while at present there are already eleven of them (2012). Another new type of a catering facility was the pizzeria. Before 1990, there had been only one pizzeria in Bratislava. Later, the rising number of pizzerias became the most typical feature of the catering facilities development in the city. For example, the first Pizza Hut restaurant (an American network) was opened in 1997. Pizza soon became the most popular meal in Bratislava. The third type of new catering facilities was the Chinese restaurants, introduced in the first half of the 1990's. Those restaurants offered a standard choice of Chinese meals at affordable prices. On the other hand, the number of typical or classical Slovak restaurants with a wider choice of meals did not change, or even slightly decreased in the early 1990's.

In 1989, there were 605 catering facilities in Bratislava (Královicsová and Otrubová 1997). That number increased significantly in the early 1990's. According to the Statistical Office data, in 1996, there were 775 catering establishments in the city. In the second half of the 1990's, that number remained stable, as shown in Figure 4.4. However, it doubled in the first decade of the 21st century. At the end of 2009, there were 1570 catering facilities in Bratislava (the Statistical Office of the Slovak Republic, 2010).

We can observe a higher spatial concentration of catering facilities at certain locations, first of all in the city centre, including its historical core. Another concentration of catering facilities can be observed in the newly built shopping centres and hypermarkets. The third important location is the large housing estates. New catering facilities are situated on the ground floors of large apartment buildings, or in new multifunctional buildings, filling in the unoccupied spaces within the estate premises. New office buildings with large numbers of employees are also places with a higher concentration of catering establishments.

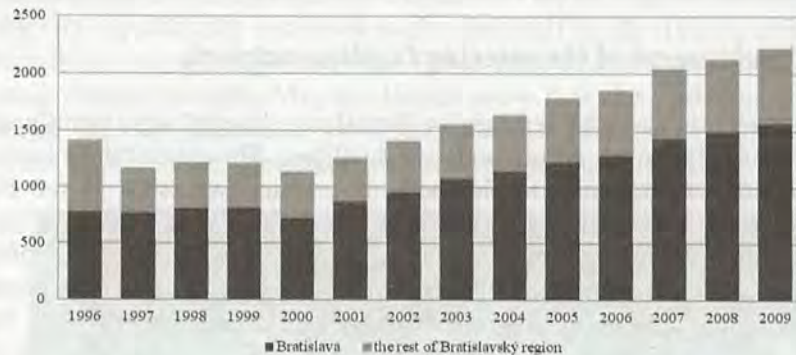


Figure 4.4. The number of catering facilities in Bratislava and the Bratislava region

Source: Authors' compilation

The development of other tourism facilities

Trade fairs and exhibitions have largely replaced the underdeveloped, though profitable, congress tourism in Bratislava. The Incheba Expo exhibition centre is undoubtedly the leader in the Slovak exhibition industry. Its only competition is the Agrokomplex exhibition centre in Nitra. The Incheba Expo provides the largest covered exhibition area in Slovakia. There are 60,000 m² of covered space, 40,000 m² of an open air exhibition area and 4500 parking places. In comparison, the Agrokomplex exhibition centre offers about 40,000 m² of covered space and 50,000 m² of an open air exhibition area. The Incheba Expo organises the largest number (about 30%) of trade fairs and exhibitions in Slovakia (Podhorná 2009). Their number exceeds 40 events a year, many of which have international reputation and attract large numbers of foreign exhibitors. Trade fairs and exhibitions are a major stimulus for tourism development in Bratislava.

Bratislava offers its visitors a lot of recreation, cultural and educational tourism opportunities. It is the leader as regards the number of museums, galleries and theatres, compared to other Slovak cities. The highest concentration of these cultural facilities is found in the historical city centre. They include the Historical Museum, Natural Museum, Bratislava City Museum, Slovak National Gallery, Bratislava City Gallery and many others. Art galleries are located in medieval palaces in the city centre, such as Mirbach Palace, Pálffy Palace etc. According to Matlovičová et al (2009), the most important cultural and social events are The Cultural Summer (Slov. Kultúrne leto) and The Castle Festival (Slov. Hradné slávnosti). They are internationally recognised events, held over the period of three summer months, presenting about 4000 artists from about 20 countries and attracting more than 100,000 visitors a year. Among the most prestigious musical festivals in Slovakia (Matlovičová et al 2009) there is the Bratislava Musical Festival (Slov. Bratislavské hudobné slávnosti). It is the only festival registered by the European Festivals Association in Brussels. This festival consists of 25 symphony and chamber concerts, performed by the leading international artists, ensembles and orchestras. Also the Bratislava Jazz Days festival has a long tradition. The cultural and historical open air and street festivals in Bratislava have substantially improved their offer over the last decade, thanks to the very attractive and popular events, such as the Bratislava Coronation Ceremony festival (based on the tradition of Bratislava being the place of Hungarian kings' coronation in the past), New Year's Eve parties in the city centre (advertised as "Welcome to Partyslava"), reconstructions of Napoleonic wars etc. All these events are well-attended by Slovak as well as foreign tourists. Nevertheless, various segments of urban tourism are still lacking attractions, which results in a limited number of domestic or foreign tourists.

The position of sports and recreation centres changed notably during the transformation period. They are now very important from the tourism point of view. Originally, facilities of this kind had little importance as regarded tourism, e.g. serving as tourist accommodation facilities. In fact, only water areas, such as Zlaté Piesky Lake (Golden Sands Lake), and the football stadium, where international football matches were organised, performed a tourist function. The supply of sports and recreation facilities is now much more diverse and their influence on tourism is much stronger. The most spectacular facility is the Ondrej Nepela ice-hockey stadium. Fully rebuilt in 2010-2011, it is the venue of most top sports events (e.g. the Ice Hockey World Championship 2011, the Ball Hockey World Championship 2011), many artistic and cultural events (not only on ice), as well as concerts. It is the home of the leading Slovak ice hockey team, HC Slovan. We

should also mention the “Wild Water” Sport Centre in the city district of Čuňovo (World Championships in Canoe Slalom in 2011, regular venue of World Cup races), the National Tennis Centre (women’s WTA tournament, men’s tournament – challenger level, Davis Cup matches, also used for concerts), the National Bowling Centre, Horse Race Course etc. There are many swimming pools of local importance in Bratislava, but without larger impact on tourism. Zlaté Piesky Lake is important mostly for domestic tourism. There are still no aqua-parks or leisure pools that could attract more visitors interested in recreation tourism and prolong visitors’ stay in the city. Such water sport and entertainment attractions are not unusual in the neighbouring metropolitan cities (the Diana Erlebnisbad leisure pools in Vienna, the Wesolandia Aquapark in Warsaw, the Aquapalace in Prague – the largest aquapark in the Czech Republic, or the Aquaworld, recently opened in Budapest, which is the second largest aquapark in Europe, etc.). The lack of such centres is partly compensated by the aqua-parks and pools in the nearby settlements of Senec (20 km from Bratislava), Podhájska, Veľký Meder, Sládkovičovo – Vincov Les, as well as by other centres in the Danube Lowland, up to 50 kilometres from Bratislava.

Bratislava has become the most important shopping centre in Slovakia. Here we can find the largest number of the third generation centres, combining shopping, social services and entertainment activities. Out of the total number of 45 shopping centres in Slovakia in 2010, ten were located in Bratislava. Half of them were third-generation shopping centres (Spodná 2010). This highlights the position of Bratislava as a centre of shopping tourism, not only on the Slovak scale, but internationally as well. The majority of visitors arrive for one day from the whole Bratislava region. The largest shopping centre in Slovakia, as regards both the size and the range of products, is the Avion Shopping Park (Spodná 2010), located in the eastern part of Bratislava, easy to reach by motorway and minor roads. The Avion Shopping Park is attractive because it contains the only IKEA shop in Slovakia. Other large shopping centres are Aupark (in the district of Petržalka), Eurovea Galleria (close to the historical core in Staré Mesto), the Polus City Centre and the Shopping Palace in the eastern part of the city. These shopping centres attract shoppers from Bratislava, the rest of Slovakia, as well as other countries, especially from the Czech Republic, and the adjacent areas of Austria and Hungary.

Bratislava is undoubtedly the most important centre of business tourism in Slovakia. It accommodates key public and private institutions, including the leading universities and research institutes. Besides, the capital city plays an important role in fairs and exhibition tourism, and to a certain extent also in congress tourism. Another phenomenon observed in Bratislava

is urban tourism, usually referred to as „city breaks“. Weekend stays in city hotels are combined with visits to cultural events, museums, galleries, local monuments and attractive places, short trips to the areas surrounding the city, or visits in local restaurants, cafes and pubs as a more relaxed form of tourism. Weekend tourists fill a large part of Bratislava hotels. The city is also a good place for one-day trips for tourists coming from Vienna. Quite large numbers of Bratislava’s visitors are one-day shoppers at the weekend.

4.6. Changes in the urban spatial structure

The revival of Bratislava started during the socio-economic transformation, after 1989. It changed from an old-fashioned, underinvested city, with run-down housing, underdeveloped trade etc., to a dynamically developing metropolis, performing national and international functions, developing modern business, high-tech industries, trade, services and tourism. The new local self-government, as well as numerous Slovak and foreign private developers invested in the restoration of the historical city centre, popular with. It was quite quickly converted into an attractive part of the city, thanks to the functional changes resulting not only from the growth of business activity in general, but also from the development of housing and tourism. The key processes that changed this part of the city included commercialisation, revitalisation and development of higher standard housing (Ondoš, Korec 2008). The commercial institutions which entered the city centre included not only hotels, restaurants and cafés, but also banks and shops selling upmarket brands. All these changes had a positive influence on the development of tourism. The revitalisation of the historical core played a crucial role. The most important revitalized buildings included the Bratislava Castle, the Carlton Hotel, the Main Square, the Hviezdoslav Square, and the Old Town Hall. Apart from that, new restaurants were opened in historical palaces (e.g. Le Monde).

Similar processes, although less intensive, were taking place in the whole inner city, which is a part of the city centre, as well as in the zones alongside the main transit routes, where we can observe large clusters of commercial buildings. However, many buildings and plots of land were unused for a long time, most probably due to the unsettled, constantly disputed ownership rights and financially weak owners. The turn of the centuries brought a big change. Favourable economic conditions convinced many developers to locate their business at sites which they had been observing for quite a long time, waiting for “better times”. The development of the zone surrounding the city centre gained a new dimension after 2000. The Danube riverside with its attractive river banks and open spaces,

conveniently linked to the city centre, became the most attractive area for developers. Three completed multifunctional zones are very good examples of the development dynamics in the Bratislava city centre.



Photo 4.3. Eurovea, the new favourite place for visitors of Bratislava

Photo: P. Korec

The first one, “Eurovea”, the biggest development project accomplished during the transformation period, is an Irish investment (the Ballymore Company had earlier invested in the London Docklands). This development consists of buildings erected close to the river. They include the five-star Sheraton Hotel, office spaces, luxury apartments, and three shopping and service areas. Numerous restaurants and cafés are located on the ground floor, facing the river and the riverside promenade. The exquisite architecture of the promenade and the surrounding open spaces, including green areas, are attractive not only to the local citizens but also visitors.

The second development area is located on the right bank of the Danube River, on the north margin of a large housing estate, Petržalka, also not far from the city centre. The new motorway which crosses Petržalka, and the green areas along the river bank, create favourable conditions for new developments. The area includes “Aupark” – one of the first shopping malls in Bratislava, and the “Aupark Tower” office building, added later. Many new buildings were built there, forming a sizeable linear cluster of shops, offices, residential buildings and recreation facilities. These two

development areas – Eurovea and Aupark – were connected with a new bridge over the Danube River in 2005. It is one of the new architectural icons of the city, awarded the “ECCS European Steel Design Award” in 2005. The Apollo Bridge also remained the sole European project among the five winning projects competing for the Opal Awards prize, granted by the American Society of Civil Engineers for the best construction worldwide in 2006.

The third interesting and frequently discussed zone, which may also be regarded as an extension of the city centre, is situated on the left bank of the Danube, to the west of the historical core. It is an area cleared of old buildings, situated between the river and a historical castle hill. This area had not been urbanised in any final form since the 1960’s, although it had always been included in construction plans. Finally, in 2010, the River Park multifunctional zone was opened. It comprises the five-star Kempinski Hotel, River Park, office and service spaces, shops, as well as luxurious, architectonically unique apartments, overhanging the Danube River. The disputes over this development concern the disruption of the centuries-old scenery (river – river bank – hills over the Danube, called the Inner Mountains – castle hill).

All three development areas described above quickly became attractive for the tourists visiting Bratislava. Apart from the fact that they are located close to the historical core of the city and offer a large variety of services, the tourists highly value other aspects as well. All the areas are well accessible by car and by public transport. The Eurovea zone is very close to the new Slovak National Theatre complex. The River Park area is situated next to the Rabbi Chatam Sofer Memorial complex and lies within the walking distance from the Bratislava Castle.

The completion of the system of motorways (D1, D2 and D4) was of utmost importance as regarded tourism in Bratislava. The motorways are located close to the city centre and they are a part of the middle ring road. Apart from the Aupark in Petržalka, motorways run near other large shopping, service and entertainment centres, as well as large specialised shops, selling e.g. do-it-yourself equipment and furniture (Avion, IKEA, Baumax, Hornbach, Galan, Kika, etc.). Building the motorway system meant not only a significant improvement in the accessibility of Bratislava from abroad and other Slovak regions, but also a huge improvement of transport connections in Bratislava itself. An important step forward was the reconstruction of M. R. Štefánik international airport, which increased its capacity (adding brand new arrival and departures halls). Restoring the direct railway link between Vienna and Bratislava (Petržalka Station) was another wise decision as regards tourism development. The next step towards im-

proving transport accessibility should be a large scale reconstruction of the Bratislava Main Railway Station (planned for autumn 2012).

4.7. Institutional changes in tourism. EU funds

In the 1990's, the development of tourism and the promotion of the city were controlled by the Department of Tourism at the Bratislava City Hall. A new institution – the Bratislava Culture and Information Centre (*Bratislavské kultúrne a informačné stredisko – BKIS*) was established in 2003 as a complementary body of the Bratislava local self-government. It performs the tasks of a tourist information office, organises courses for tourist guides, and is responsible for information distribution and promotion of Bratislava as a tourist destination. It co-operates with the Bratislava Mayor's Office, which currently includes the marketing and public relations department, as well as the department of tourism and destination management. However, for a long time, Bratislava and whole Slovakia lacked an organisation which would have dealt with destination management and co-ordinated the activity of tourism entities. The Bratislava Hotel Association aspired to that function in the first decade of the new millennium, but later, after some reshuffling (its first chairman left the association), it withdrew.

The situation started to improve after the adoption of new tourism-supportive legislation in 2010. On the strength of Act No. 91/2010, district or regional tourist organisations can be established. They are in fact organisations dealing with destination management, which was absent in Slovakia until 2011. In practice, they are associations consisting of local and regional authorities and state administration units, as well as private tourist companies. Their primary function is to co-ordinate all the entities contributing to tourism development in their region. These tourist organisations can be partly financed from the state budget. Thanks to the improved legislation, the Bratislava Tourist Board (*Bratislavská organizácia cestovného ruchu*) was established at the end of 2011. It consists of the local authorities and 38 private business entities. According to its official documents, its primary tasks include:

- co-ordinating the activity of individual entities supporting tourism development strategies and tourism activities in the city,
- presenting Bratislava at trade fairs, exhibitions and tourism events in Slovakia and abroad,
- co-operating with state administration as regards tourism development,
- collecting financial resources for tourism development and promotion of Bratislava,

- controlling the BKIS (Bratislava Culture and Information Centre) activity.

The EU funds for the development of tourism in Bratislava have always been quite limited. For example, in 2004-2006, the main objective of the tourism and leisure policy in the region of Bratislava was a more efficient exploitation of the recreational potential of the rural settlements of the Bratislava agglomeration. Only the rural districts situated on the outskirts received EU funds (city districts of Záhorská Bystrica, Vajnory, Devín, Rusovce, Jarovce and Čuňovo). The majority of tourism projects in the neighbouring districts of Pezinok and Senec, belonging to the Bratislava region, were financed from these sources. Within the framework of the Bratislavský Region Operational Programme (2007-2013), several settlement regeneration projects have been accomplished in the city area. We can mention here the revitalisation of the "Blumentálska" recreation zone in Stare Mesto (Old Town), or other public spaces, squares and main streets in other city districts. Nevertheless, the role of these projects in tourism development is rather insignificant. Other means were devoted to the revitalisation of natural heritage and the development of cycling-routes in the Bratislava region. One of the most important projects which influenced tourism development was "Cyklomost" - a bridge for cyclists over the Morava River, in the district of Devínska Nová Ves. It joins the cycling routes in Bratislava and Western Slovakia with the cycling routes in Austria. It was open in 2012, thanks to the financial resources allocated within the cross-border co-operation funding scheme.

4.8. The number and structure of Bratislava visitors

Changes in the number of visitors after 1989

In 1989, the number of visitors to Bratislava, expressed by the number of tourists using tourist accommodation facilities (nearly 450,000), was the highest in the whole decade. In the first half of the 1990's, the number of visitors did not correspond to the number of accommodation facilities and their capacity. The number of visitors decreased in 1990-1992, but rose again during the next four years. A logical consequence of that trend (a dynamic growth of the number of accommodation facilities and stagnation in the number of visitors) was a decrease in the use of bed-places from 70% in 1989 to 35% in 2000 (the Statistical Office of the Slovak Republic). The number of visitors dropped below 300,000 in 1992 and until 1995 there were

fewer visitors a year than in 1989. In 1996, Bratislava was visited by 480,000 people. In 1996-2003, the number oscillated between 420,000-500,000 visitors annually.

The greatest development of tourism during the post-socialist transformation period was observed in 2004-2008. It was measured by the number of visitors, which increased by 50%. In 2008, almost 780,000 visitors stayed in Bratislava, which is the record number in the modern history of the city (Figure 4.5). The growing interest in visiting Slovakia was largely due to the country joining the European Union, and the fact that new members were widely promoted in the old member states.

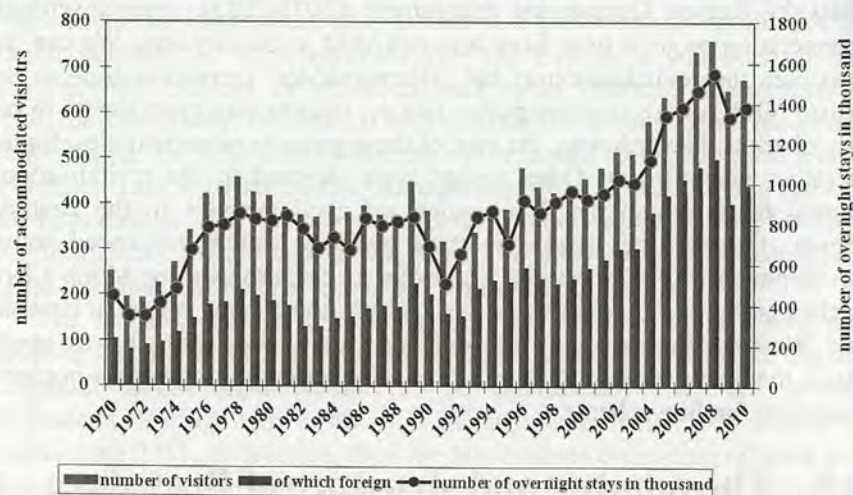


Figure 4.5. The rising number of tourists in Bratislava

Source: Statistical Yearbook of Bratislava – the SR capital 1973-1989. Urban Report SPE, 1974-1990; Statistical Yearbook of Bratislava – the SR capital 1993-2010. SR Statistical Office, 1994-2011

When Bratislava joined the EU in 2004-2005, the situation in the city resembled that in previous years, with insufficient number of facilities to accommodate foreign visitors on working days. As a result, several new construction projects were devised, especially as regarded building hotels of a higher standard. Most of them were accomplished, but some remained unfinished. In 2009, the global financial and economic crisis reduced the inflow of visitors. At present, when the supply exceeds the demand, most accommodation facilities have difficulty in exploiting its bed capacity. The

percentage of individual accommodation facilities categories against the total number of visitors in 2010 is shown in Table 4.3.

Table 4.3. The percentage of individual accommodation facilities categories against the total number of visitors to Bratislava in 2010

Facility category	Visitors total		Foreign visitors		Overnight stays total	
	number	%	number	%	number	%
Hotels and motels total	557 347	82.62	387 076	87.64	968 953	70.16
4 and 5 stars	243 431	36.08	196 311	44.45	388 863	28.16
3 stars	228 823	33.92	152 709	34.58	389 996	28.24
2 stars	63 132	9.36	26 699	6.05	141 316	10.23
1 star	21 961	3.26	11 357	2.57	48 778	3.53
Hotels	7 687	1.30	6 660	1.51	12 622	0.91
Hostels	38 728	5.74	25 956	5.88	70 599	5.11
Guest houses	10 424	1.55	3 792	0.86	23 508	1.70
Campsites and other	59 276	8.79	17 302	3.92	302 857	21.93
Total	674 630	100	441 647	100	1 381 024	100

Source: Statistical Yearbook of Bratislava – the SR capital 2011. SR Statistical Office, 2012

Bratislava has always been the most visited tourist centre in Slovakia. A comparable number of visitors could be observed only in the High Tatra Mountains region. According to the statistics, out of all the visitors that used accommodation services in Slovakia in 1990, 12% stayed in Bratislava. In 2010, the number increased even further, to 20%. The share of the High Tatras region, as the second most visited region in Slovakia, increased from 8% to 12% over that period of 20 years. However, it is important to know that the High Tatras region comes first as regards the number of overnight stays. It is a recreation tourism centre with longer stays. In contrast, the majority of stays in Bratislava are short – two nights on average, which comes from the fact that the predominant type of tourism in the city is the business and congress tourism. This also explains the fact that there are more stays on working days, while hotels have occupancy problems during weekends.

4.9. Changes in the structure of visitors

The structure of visitors changed during the transformation period in Bratislava. Before 1989, domestic visitors prevailed over the foreign ones. Their percentage in the total number of visitors oscillated between 40% and 45%. However, the share of foreign visitors rose above 50% in the early 1990's and it has stayed above 65% in the last five years (Figure 4.6). Opening the borders between the former "east" and "west" blocks greatly enhanced this development. It offered foreigners the possibility to visit Bratislava. Since 1993 (after the division of former Czechoslovakia), visitors from the Czech Republic have also counted as foreign, which caused a decrease in the percentage of domestic visitors. What is more, the purchasing power of the Slovak population declined. In the 1990's, most hotels in Bratislava responded to this trend by offering special lower prices to domestic customers, in comparison to the prices calculated for foreign tourists. As a result, the foreign guests, who constituted 55% of the tourists staying in the city, generated about 80% of total gains from accommodation facilities in 1996.

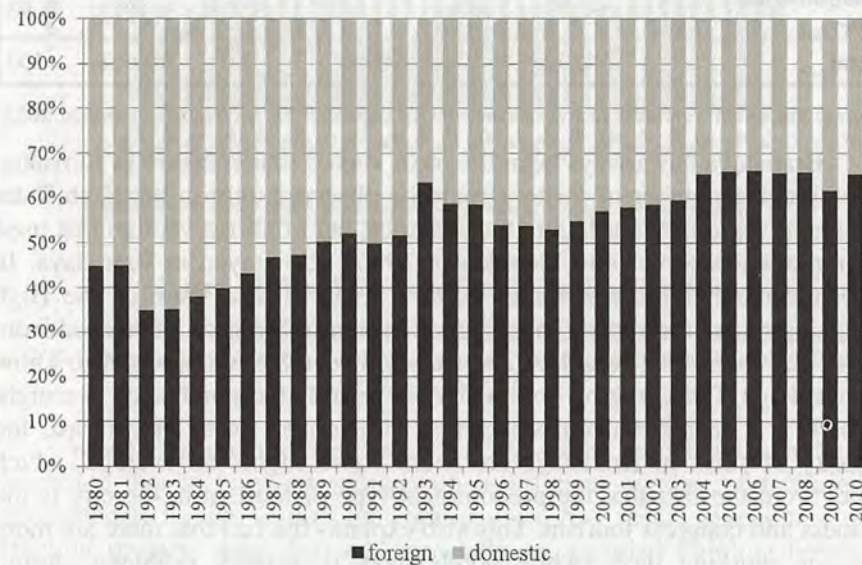


Figure 4.6. The development of foreign and domestic visitors in Bratislava

Source: Statistical Yearbook of Bratislava – the SR capital, 1973-1989. Urban Report SPE, 1974-1990; Statistical Yearbook of Bratislava – the SSR capital, 1993-2010. SR Statistical Office 1994-2011

The positive fact is that the growth rate in the number of foreign visitors is higher than the growth rate in the total number of visitors. While in 2010 the latter rose by 50%, compared to 1989, the former almost doubled (a rise by 96%). The percentage of foreign visitors in the total number of visitors is growing steadily. Nevertheless, the number of foreign visitors, as well as the total number of visitors decreased by thousands, as a result of the recent economic crisis (Figure 4.5). In 2010, there were over 430,000 foreign visitors (Statistical Office of the Slovak Republic).



Photo 4.4. The old building of the Slovak National Theatre in the city centre

Photo: P. Korec

In the socialist period before 1989, the majority of visitors to Slovakia and Bratislava came from European socialist countries. An influx of more solvent tourists from western countries was expected after 1989. However, more than 40% of foreign visitors that came to Bratislava in the first half of the 1990's, after the division of Czechoslovakia (1993-1996), were from the former socialist "eastern bloc" (except the former German Democratic Republic). The most numerous foreign groups of visitors were Poles (almost 50,000 – over 18% of all foreign visitors), Germans (under 39,000) and Czechs (over 38,000), who constituted over 46% of all the visitors staying in Bratislava in 1996. The fourth largest group of foreign visitors were Italians

(over 15,000 in 1996). The percentages of visitors coming from other countries did not exceed 5%, with the exception of the visitors from Austria (almost 13,000) (Kralovicsová 1999).

Table 4.4. The structure of visitors in Bratislava and Slovakia (in thousands)

	1996 Bratislava		2010 Bratislava		2010 Slovakia	
	Number in thousands	%	Number in thousands	%	Number in thousands	%
Visitors total	482.0	100	669.1	100	3 571.1	100
Foreign visitors	260.3	54.1	434.9	64.9	1460.4	40.9
Foreign visitors total	260.3	100	434.9	100	1460.4	100
Czech Republic visitors	37.0	14.2	73.5	16.9	477.1	32.7
Poland visitors	45.8	17.6	36.1	8.3	172.0	11.8
Germany visitors	37.2	14.3	49.1	11.3	133.5	9.1
Austria visitors	14.1	5.4	21.3	4.9	59.0	4.0
Hungary visitors	3.6	1.4	7.8	1.8	59.0	4.0
Italy visitors	16.1	6.2	35.7	8.2	52.0	3.6
Great Britain visitors	8.3	3.2	27.0	6.2	39.6	2.7
France visitors	11.2	4.3	18.7	4.3	35.9	2.5
Ukraine visitors	5.7	2.2	6.1	1.4	35.6	2.4
Russia visitors	10.2	3.9	9.1	2.1	35.2	2.4
USA visitors	10.9	4.2	14.4	3.3	26.4	1.8
Romania visitors	1.3	0.5	1.7	0.4	20.6	1.4
Spain visitors	2.3	0.9	12.2	2.8	19.6	1.3
Netherland visitors	7.3	2.8	7.8	1.8	18.5	1.3
Japan visitors	5.7	2.2	9.1	2.1	7.3	0.5
Other visitors	43.5	16.7	105.2	24.2	268.7	18.4

Source: Statistical Yearbook of the Slovak Republic 1997, 2011

Czechs have been the most numerous group of visitors over the years (the Statistical Office of the Slovak Republic). The largest number of Czechs staying in Bratislava was recorded in 2008 (nearly 77,000). Although that number has decreased in recent years, it was still almost 73,500 in 2010

(almost 17% of all foreign visitors to Bratislava, Table 4.4). The second largest group of foreign visitors in recent years has been Germans (over 49,000 in 2010). The most significant decrease in the number of visitors to Bratislava was recorded among Poles. While in 1996 there were about 50,000 visitors from Poland, in 2010 it was only slightly above 36,000 (only about 8% of the total number of foreign visitors). The number of visitors from Russia decreased as well, but it started to grow again in 2009, reaching the level recorded in the first half of the 1990's in 2010 (over 9,000). In 2010, larger numbers of visitors came to Bratislava from Italy (over 35,000), Great Britain (27,000) and Austria (nearly 22,000). The percentages of visitors from other countries were below 5% of the total number of visitors (it means less than 20,000 in absolute numbers). In most cases, the number of foreign visitors (except tourists from Russia) has decreased since 2008, due to the economic crisis. The largest decrease has been recorded among the visitors from Great Britain (over 40%) and France and the USA (about 25% each).

4.10. The expected future tendencies in tourism development. Conclusions

Future tendencies in tourism development

The tourist region of Bratislava can be divided into the following four sub-regions: the capital city of Bratislava, the city of Senec, the „Malokarpatský“ vineyard region and the belt of floodplain forests and water areas along the left bank of the Danube River. We have to take into account the following factors when considering the future of tourism in this region:

- its unique position among the tourism regions in Slovakia – it relies on Bratislava as the multi-spectral tourism centre with a high percentage of foreign visitors,
- well-developed short-term tourism throughout the year (cultural, social, event, shopping, congress, business tourism etc.),
- there are more centres of summer tourism and leisure, located in the area surrounding Bratislava (Slnečné jazerá Senec, water sports area in Čunovo, the lakes in Dunajská Lužná etc.), which stimulate tourism development in Bratislava much more efficiently than before,
- the growing role of attractive tourist centres in the Malé Karpaty mountains (Modra-Harmónia-Piesok, Pezinská Baba, Smolenice-

Jahodník, Častá-Červený Kameň) and in the west, in the region of Záhorie (Plavecký Štvrtok-Kamenný Mlyn, Malé Leváre),

- the favourable location in Central Europe and in Slovakia, on its south-western edge, will create good transit conditions and generate short-term stays of transit travellers,
- we can expect further cross-border co-operation in tourism and other areas, e.g. building tourist cycling routes,
- taking advantage of the Danube River has already become a reality in active tourism, but some other possibilities are being considered (yachting in Čuňovo, rafting on the Danube etc.),
- there are possibilities to use rural development programs for tourism purposes in the neighbouring rural regions (wine tasting, so-called wine routes, traditional culinary attractions, such as goose specialities in Slovenský Grob etc.).

The spatial structure of Bratislava may take a unique form due to the architectural development in the south-western part of the city. There are agricultural areas in neighbouring Austria close to Bratislava, which are regarded as potential spatial reserve for the future development of the city. The change of the state border with Austria after joining the EU and the Schengen zone, the growing standard of living of Bratislava inhabitants, as well as the developers' interest in the area, are the main reasons why we have to take it seriously. There is a strong need to maintain and develop the relations between Bratislava as the core of the region and the centres in the neighbouring areas across the border, such as Marchegg, Gänserndorf, Bruck a/L, Hainburg and Kittsee in Austria, and Rajka and Mosonmagyárvár in Hungary. The most important and frequently discussed project is the building of a large-scale multifunctional shopping, fun and leisure complex with a mega-casino in the middle. Due to the fact that this project was considered controversial and there were protests against it in Bratislava and Slovakia (mostly against gambling), there are plans to build the complex outside the Slovak borders, but still close to Bratislava.

Conclusions

Bratislava with its cultural and historical potential is one of the most important centres of tourism in Slovakia. We have to mention here the Bratislava castle (now after large-scale restoration) and its interiors, as one of the most attractive and most visited cultural and historical building in the city. Its origins can be traced back to the 9th century, to the period of Great Moravia as the first state that included today's territories of Slovakia, Moravia and Czechia. Another exceptional monument in Bratislava are the ruins

of the Devin castle. It is located in the western part of the city, at the confluence of two important central European rivers – the Danube and the Morava. In the 5th c., the Devin castle hill was an important defence point, which protected the settlement on the territory of today's Bratislava against western conquerors. A very valuable archaeological exposition is found there now. The third important group of cultural and historical monuments are the noblemen's palaces built in the 17th-19th c. It was the period when Budapest was occupied by Turks and Bratislava served as the capital of Hungary and the coronation city of Hungarian kings. Of course, we can find many other cultural and historical monuments from the older or more recent history of the city and whole Slovakia.

Bratislava is not only the political and economic, but also the cultural centre of Slovakia, with numerous theatres, museums, galleries and other cultural institutions of national and international reputation. We have to mention such leading cultural institutions as The Slovak National Theatre, Slovak Philharmonic Concert Hall, the Slovak National Gallery, or galleries in Mirbach and Pálffy palaces. The new gallery of modern art – Danubiana – Meulensteen Art Museum (founded in 2000) has become very popular. It was built at an unusual location – on a peninsula, close to a system of water works and dikes on the Danube River in Čuňovo. Large events of various kinds are very popular among Bratislava's visitors. They can be considered as the second primary source of tourism supply in Bratislava. The many events organised during the year include international fairs, music festivals, sports events, or street festivals.

The high natural environment potential is the third basic source of tourism supply. The territory of the city includes the Malé Karpaty Mountains, offering good conditions for hiking, mountain biking in summer and skiing in winter. The Danube and the Morava Rivers have a substantial influence on the tourism supply. Both offer good conditions for watersports, which improved even further after 1992, when the water works system on the southern margin of the city in Čuňovo had been completed.

After 1989, tourism in Bratislava started to flourish. The "iron curtain" between the former socialist and the capitalist world was removed. Bratislava, as a city lying on the border with Austria, opened to Western Europe. Later, it became the capital city of the new state of Slovakia, established in 1993. That led to a rapid development of tourism. We observed an increase in the number of catering and accommodation facilities; new forms of tourism developed, other more traditional forms started to expand rapidly (business, congress, cultural, exploration, shopping tourism, etc.). The transport accessibility of the city improved considerably, due to the completion of the motorway system, a large-scale reconstruction

of the airport, and improvements in railway transport. Bratislava became an important transit area for Slovak as well as foreign travellers. A whole range of positive changes took place in the tourism institutions in Bratislava.

Tourism development after 1989 is related to the changes in its spatial urban and physical structure. Within a short period time, Bratislava changed from a neglected, provincial, industrial city into a modern urban metropolis. The historical core of the city, as well as large sections of its central parts, underwent extensive reconstruction and revitalization. The city centre expanded thanks to three new large development projects – Aupark, Eurovea and River Park. They immediately became organic parts of the city centre, highly popular among domestic as well as foreign tourists. A whole string of shopping centres and galleries were built alongside the motorways crossing the city. They are visited not only by the inhabitants of Bratislava, but by all visitors, including transit tourists. The commercialisation of the city centre, a secondary city centre, as well as large housing estates also positively influenced the development of tourism in 1989.

We can conclude that Bratislava is a modern city with a large number of cultural and historical monuments, events, as well as natural environment favourable for the development of modern urban tourism. As the capital city of Slovakia and its political and economic centre, Bratislava is a popular business and urban tourism destination. For most tourists, Bratislava is the place of their first and often only encounter with Slovakia. That is why the state supports tourism in the city and the authorities are constantly trying to improve the institutional base of tourism development.

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5. Kaliningrad – Russia

5.1. The location, accessibility and role of Kaliningrad in the network of Russian cities

Kaliningrad is the administrative centre of a Russian exclave on the Baltic Sea, situated in the most western territory of the Russian Federation, and bordered by Poland and Lithuania. The administrative land border is therefore also a part of the frontier between the Russian Federation and the European Union. Kaliningrad was formerly the East Prussian city of Königsberg.

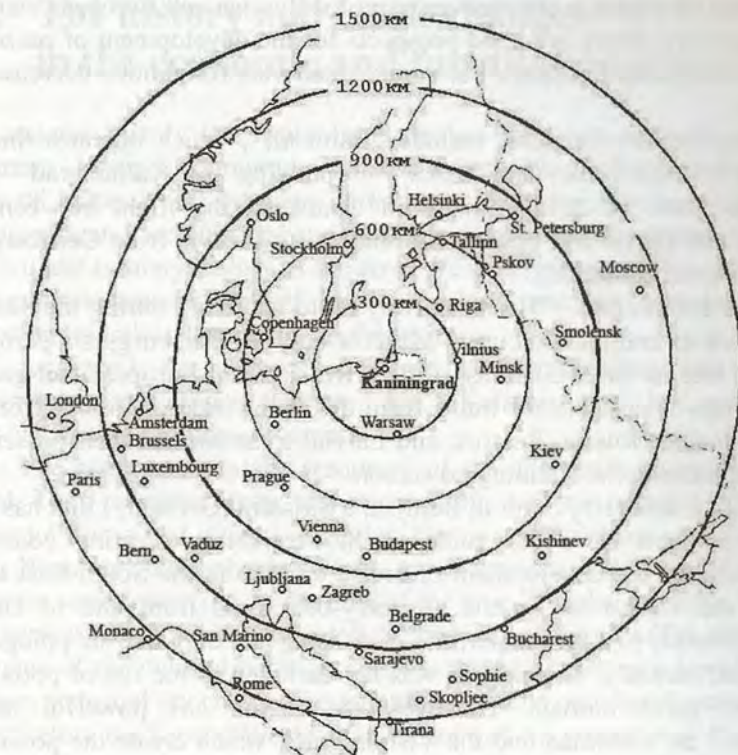


Figure 5.1. Location of Kaliningrad

Source: G. Fedorov

transformačného obdobia. Premeny v bieloruskom Minsku len začínajú, mesto má slabo vyvinutú turistickú infraštruktúru a obdobie dynamického zvyšovania turistického ruchu ešte stále pred sebou.

Preskúmaná skupina miest ukazuje rôzne fázy transformácie v oblasti turistiky v mestskom prostredí. Tieto premeny sú odôvodnené ekonomickou, sociálnou aj politickou situáciou. Na základe pozorovaní vymenovaných miest autori práce rozlíšili tri mestské skupiny.

Ku prvej skupine patria Lodž a Bratislava, ktoré nachádzajú sa vo veľmi pokročilej fáze transformácie, s veľkým podielom turistiky, usporiadanej zreteľne podľa kapitalistického modelu.

Do druhej skupiny autori zaradili Lvov a Kaliningrad, ktoré sú ešte stále na začiatku pokročilej fázy transformácie, ale cestovný ruch sa na ich územi intenzívne vyvíja a vstupuje v kapitalistické štádium.

V poslednej skupine je Minsk, ktorý sa nachádza vo mierne pokročilej transformačnej fáze. Vývin kapitalisticky zameranej turistiky len tam začíná a mestská infraštruktúra slúži viac obyvateľom ako návštevníkom.

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