

CHALLENGES FOR THE VISEGRAD GROUP – THE CORONAVIRUS CRISES AND ITS IMPACT ON TOURISM

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This paper aims to analyze the regional cooperation which ensures stability and good relations to neighbours and other V4 countries and helps to enforce collaborations across Europe in many fields such as education, tourism and economic development. Another field of activity of the Visegrad Group is a joint positioning in international tourism which will be addressed in this article on the background of the current coronavirus crisis. The empirical part consists of a SWOT analysis for Visegrad group challenges and a PASTA Analysis with which the effects of the coronavirus pandemic on the tourism industry in the V4 countries are researched. Lastly, recommendations for possible further actions in times of the coronavirus will be given, and potential future collaborations with the WB6 and EaP countries, also with regard to tourism, will be dealt with briefly. This article summarizes aspects related to tourism market, transport, cultural offer, economy, industry, and environment. The particular focus is also paid to political, economic, sociological, technological, legal and environmental factors of the Czech Republic, Poland, Hungary and Slovakia and how the current coronavirus and the resulting measures against the spread of it affects the tourism industry in the Visegrad Group countries.

Keywords: tourism market; Visegrad Group; COVID-19; sustainability; economic development

Introduction

With the ongoing coronavirus COVID-19 pandemic and the resulting closure of borders and travel restrictions and advisories, the tourism industry faces and will face tremendous problems during the next months or even years in the V4 countries and also worldwide. Therefore, a PASTA Analysis reflects what a new marketing plan could look like during this current crisis for the Visegrad group. To begin with, an overview of tourism and its importance in the Czech Republic, Poland, Hungary and Slovakia will be given. Afterwards, the PASTA Model with its corresponding steps problem definition, analysis, strategy, tactics and action are applied.

Overview of Tourism in the Visegrad Group

In the Czech Republic, tourism numbers constantly increased since 2012 from 15 million to almost 18.4 million arrivals of tourists in collective accommodation establishments in 2016. The ratio between domestic and international arrivals is almost 50/50 with international arrivals having slightly higher numbers. Tourism receipts both increased and decreased between 2012 and 2016 with 5,397 million € in 2012 and 5,149 million € in 2016. Furthermore, Travel & Tourism directly contributed to 6.1 % of the GDP in 2016 (4.1 % in 2012) (Czech Tourism, 2017).

Arrivals of tourists in collective accommodations increased through the years in Hungary as well to almost 11.1 million arrivals in 2016. Almost 50 % of those guests were international tourists with the numbers of domestic visitors being slightly higher. Tourism receipts increased from 3,993 million € in 2012 to 5,109 million € in 2016. 2.5 % of Hungary's GDP in 2016 were directly contributed by the Travel & Tourism sector (Czech Tourism, 2017).

Tourist numbers increased as well in Poland from 22 million arrivals in 2012 to almost 29 million in 2016. The ratio between domestic and international arrivals is different from the other three countries with 80 % domestic guests facing only 20 % international tourists. 13,200 million € were generated through tourism in 2016 (9,600 million € in 2012) but no numbers

were given on how high the share of Travel & Tourism is on the nation's GDP (Czech Tourism, 2017).

Slovakia's numbers increased as well to over 5 million tourist arrivals in collective accommodation establishments of which 60 % were domestic guests. Over 2,400 million € were earned in tourism receipts in 2016 showing a significant growth compared to the number from 2012 (1,789 million €). The direct contribution to the GDP was 2.7 % in 2016 with hardly any changes to 2.5 % in 2012 (Czech Tourism, 2017).

Those numbers show that tourism plays an important role in the Visegrad countries and restrictions on tourism can have serious impacts on the countries' economies. The V4 has a joint tourism campaign called Discover Central Europe which is aimed at promoting trips to the four countries in global overseas markets. In 2016, their marketing was mainly targeted at the USA, Russia, China, and South-East Asia (Czech Tourism, 2017). Therefore, their focus is on attracting mostly visitors from countries outside Europe and generating more international tourist arrivals, which will be a problem given the current circumstances.

Materials and methods

The PASTA Analysis is a method developed by SOSTAC® (Smith & Zook, 2016), which is used for strategic and operational online planning activities. The PASTA model developed by P. R. Smith, is a method used to provide a structure for developing an online plan. This article is conducted by theoretical consultancy during March and April 2020 of the secondary data as several political (PAP – Polska Agencja Prasowa, MTI, TASR, ČTK) and social documents, international news online (CNN & ČT1) and international newspapers (Gazeta Wyborcza, Newspaper, Népszabadság, The Budapest Sun, Hospodářské noviny and Týden). This analysis is composed of the problem definition, an external and internal analysis of the organization, in this case the Visegrad Group, strategy, which is further divided into target group, objectives, proposition and positioning, tactics, and finally action (Smart Insights, 2017, n.p.).

Table 1 SWOT Analysis of Tourism in the Visegrad Group

Strengths
<ul style="list-style-type: none"> ■ Geographical location and proximity (sources of tourist flows, transit zone) ■ High touristic offer for favourable prices: historical and cultural monuments, folk festivals, tradition of city tourism, music tradition, UNESCO monuments, national parks, memento of communism, tradition of hiking trails ■ Undiscovered regions and natural protected areas ■ Chance for congress tourism: Prague, Warsaw, Cracow, Budapest of supraregional importance ■ Economic Growth (catching up at national, regional and wage levels; economic and trade cooperation) ■ EU membership of all four countries ■ Central coordination of political actions: Stronger position for decisions and better representation of interests in the European Union ■ Decreasing unemployment & low Gini coefficients ■ Finances: Strong attraction of FDI, consolidated public finances, low inflation rates, low level of private debt
Weaknesses
<ul style="list-style-type: none"> ■ Regional differences in the quality of transport infrastructure ■ Insufficient infrastructure and quality of accommodation and catering facilities ■ Low offer and quality of services, amusement and sport facilities ■ Poor information and reservations systems ■ Dilapidating historical and cultural monuments ■ Low motivation and activity of entrepreneurs to promote alternative forms of tourism ■ Poor legislation networks, no central coordination of regional development ■ Insufficient promotion and marketing (bad image of "communist" countries) ■ Fight against corruption, lack of transparency in public procurement ■ Lumbering bureaucracy ■ No common currency ■ Partial decline in productivity and trade ■ Poor innovation performance, sluggish investments ■ Low fertility rate and declining population growth rate ■ High monetary poverty rates
Opportunities
<ul style="list-style-type: none"> ■ Bigger touristic demand after the EU accession ■ Boom in low cost carrier ■ Alternative and modern form of tourism (e.g. conventional, eco- and rural tourism) ■ Development of domestic tourism (rising domestic demand) ■ Regional marketing and tourist information systems, new info technologies ■ Joint products between V4 countries (cross-border cooperation, tour operators, investments in hotel industry) ■ Prevention of the "brain drain" and attraction of foreign skilled workers ■ Further decrease of unemployment and regional differences through cross-border cooperation ■ Subsidizing from the EU Structural Funds (improvement of transport infrastructure, increasing investments in research and development, upward trend of innovation) ■ Higher industrial, manufacturing and export potential (diversification of export markets) ■ Increase of the minimum wage ■ Increase of the population growth and fertility rate through family friendly and immigration policies
Threats
<ul style="list-style-type: none"> ■ Loss of competitiveness due to insufficient infrastructures and service sector ■ Educational deficiencies regarding technological change ("brain drain") ■ Underestimation of human capital and education (shortage of skilled and unskilled labour) ■ Underestimation of maintenance of cultural and technical monuments ■ Poor legislative network and control of quality ■ Lack of capital, low state support for business ■ Inadequate coordination ■ Stronger competition of tourist destinations without joint coordination and promotion activities ■ Demographic change and ageing of society ■ Financing social protection and pension system ■ Fluctuating currencies/exchange rate vulnerability ■ Political resistance to the euro currency ■ Low growth of main export partners

Source: own elaboration based on Neubert 2019, p. 1; Kiss 2015, p. 358f.; Vágner 2007, p. 82-84; Vida 2015, p. 162f

Results and discussion

Problem Definition

The measures taken to control the spread of the coronavirus force people to restrict their personal freedom. All sectors of economy are influenced by these measures and restrictions. The tourism industry in particular is strongly affected by the limited mobility of people. Countries close their borders for incoming tourists and events and fairs are cancelled. Roman Prymula, the head of the Czech COVID-19 crisis team, is considering particularly strong measures. On March 23rd 2020, he spoke about a closure of the border for incoming people for at least six months. Actually, he becomes even more drastic with his statement that the border restrictions may last up to two years in the most extreme case. The main goal is to avoid conditions such as in Italy, France, Spain and Germany as well as a potential second or third wave of the pandemic (Expats, 2020). This is the only way not to overload the capacities of the health system in the countries. The lack of information about COVID-19 makes a predictable development of necessary measures in the Visegrad Group countries very difficult. Hotel operators and travel agencies suffer from these restrictions and measures. They must fear for their economic existence since domestic and foreign tourism is completely shut down during this current stage of the crisis.

Given the previous increase in the number of tourists, these circumstances are particularly problematic. As already mentioned, tourism directly contributes with a high proportion to the GDP of the countries of the Visegrad Group. The result is a strong dependency of the national economy on tourism. While the tourism industry's revenues are now approaching zero, the costs of maintaining business viability remain. The intensified situation will have a long-term impact on the number of overnight stays and guests. Firstly, all bookings which were already made during this crisis have been cancelled. Secondly, due to the lack of predictability for the duration of the crisis, no new bookings by airlines, hotels and tour operators are currently being made. Many tourism players will not be able to cover their running costs in the long term and will go bankrupt. A loss of numerous jobs in the tourism industry, which is already apparent right now, may drastically increase in the Visegrad Group countries over the next seasons. This also affects countless companies in the catering and retail sectors, which primarily and secondarily benefit from tourist expenditure. These include

e.g. restaurants, cafés, bars and souvenir shops. Also, service and transport companies (e.g. taxis) as well as the construction and handicraft industries have been experiencing a significant decline in demand.

The situation can only be mitigated if income in tourism is generated again. Due to the closed borders, this goal is hardly achieved by foreign tourism. For this reason, the tourism industry of the Visegrad Group must focus on domestic tourism. In view of the upcoming economic crisis, this poses a major challenge, but is currently the only way to compensate for the missing incomes during the next months and even years.

Analysis

The problem, which the V4 countries are dealing with right now, is that no tourists from overseas and even other European countries will be coming until the crisis is overcome. With the joint tourism organization Discover Central Europe, the V4 countries want to promote incoming tourism from overseas countries. The numbers mentioned earlier show that a half of all tourists in the Czech Republic and Hungary are incoming tourists. Those numbers are lower in Poland with 20 % and Slovakia with 40 % international arrivals. However, significant shares of tourism revenue are breaking away in all four countries due to the entry stop. On top of that, domestic tourism also came to a complete halt at the moment.

Nonetheless, domestic tourism will probably be restarting sooner than incoming tourism. Thus, the Visegrad Group countries should focus on promoting domestic tourism. Since trips between the Czech Republic, Hungary, Poland and Slovakia will not be possible due to the virus either, a joint marketing and promotion campaign does not make sense in this case and every country should focus on its own tourism industry. This also means that the countries do not have to compete for tourists with other countries. However, different regions within a respective country will face increased competition.

Strategy

As already mentioned, every country should focus on its tourism industry and its domestic tourism. Therefore, the new target group of each country will be its own inhabitants. They will not be able to go on a trip abroad and must choose a domestic destination if they wish to go on a holiday. Another problem is that many have either lost their jobs or are earning less money, so the question is if an increase in domestic tourism is probable and realistic. However, a lot of people would possibly like to go on a vacation to go back to normal life and everything should be done to maintain the tourism industry. The objective of each of the Visegrad Group countries is to maintain at least parts of the tourism industry to avoid a complete collapse of the tourism revenue at all costs since this would have far-reaching impacts on the countries' economy and GDP. No international travel and a focus on its own country mean that the countries do not have to compete for tourists with other countries but within the particular country.

Tactics

An ingenious and extensive marketing tactic is not as important and necessary since the focus is on domestic tourism only. The V4 countries are rather small or medium sized and the inhabitants probably know a lot about their countries and the potential tourism destinations. Additionally, not an extensive amount of money should be spent on tourism promotion given the current economic and thus financial circumstances. An idea would be to focus on newspaper articles, social media channels and maybe a website to show the inhabitants the beauty of their own countries and promote tourism in that way.

Action

As already mentioned, the countries should focus on low budget strategies to increase the numbers of domestic tourism. On top of that, it would also be possible that the original Discover Central Europe campaigns in overseas countries are continued to stay in mind of potential tourists for possible trips in the future once the crisis is overcome. However, this would be a risky and costly strategy since it is not predictable how the situation will develop and when tourists are allowed to enter the country again. In the following conclusion, one recommendation to promote domestic tourism and increase tourism numbers again will be given.

Conclusions

The Visegrad Group is very engaged in maintaining and promoting partnerships with other neighbouring countries or groups of countries. Two of those are the WB6 and the EaP group. The V4 supports a potential integration of the Western Balkan countries into the European Union with the aim of achieving stability and security in those countries. Other fields of interest are fighting corruption and reforming the rule of law in the WB6 countries as crucial requirements on paving the way to potential EU memberships. The collaboration of the WB6 and V4 countries is manifested in summits of the foreign ministers of the respective countries that regularly take place and where current issues are discussed and know-how is shared (Government of the Czech Republic, 2019, n.p.; Juzová et al., 2019).

The EaP is a joint initiative that consists of the six countries Armenia, Azerbaijan, Belarus, Georgia, Moldova and the Ukraine and is aimed at fostering cooperation with the EU. The Visegrad Group collaborates with and supports EaP in several fields which can be seen in their numerous joint meetings and statements. Their mutual interest includes topics in the fields of democratization, regional cooperation, good governance and support for civil society and self-government (Murray, 2014).

Even though the focus of V4's collaborations with other partnerships lies mostly in political aspects, tourism may also be a field of interest in the future. If the WB6 or EaP countries meet the requirements of the EU one day and are eligible to become members, travelling there will be much easier. With the joint tourism initiative Discover Central Europe in mind, something similar would be a promising idea to promote tourism in those countries as well. A big joint initiative could be another idea to bring more guests to all of the Central and Eastern European countries (e.g. an extension to Discover Central and Eastern Europe). However, given the current coronavirus situation which is still developing with other news each day, it is difficult and not reasonable to focus on the ideas just mentioned in the near future. Every country has to focus on its own and overcome the crisis first before any joint projects and ideas can be pursued and realized or even taken into consideration.

The PESTLE Analysis should show a short overview of the Visegrad Group countries and provide the political, economic, sociological, technological, legal and environmental factors of the four countries. Similarities but also differences have become obvious looking at the various aspects. The political factors show that all countries transitioned to democracy in the late 20th century. Freedom of expression, civil rights, and media freedom are mostly granted and elections are free. The GDP's of the countries differ slightly but all lie below the EU average. The unemployment rates are relatively low, with the exception of Slovakia and with the Czech Republic having a particularly low rate of just 2.9 %. The countries' life expectancies are below the EU average as well and the risk of poverty ranges from 12.2 % in the Czech Republic up to alarming 25.6 % in Hungary. Looking at high-tech manufacturing and knowledge-intensive services, around 44 % of the population is working

in that field and the patent applications are quite low. Fighting against corruption is an important task in all countries. In reality, however, corruption is still prominent and not always persecuted properly. Lastly, it became obvious that even though an increasing share of inhabitants is more environmentally conscious nowadays, environmental protection is not the key priority in most of the countries of V4, perhaps with the exception of the Czech Republic.

The second research question on the impact of coronavirus on tourism can be answered when looking at the tourism overview of the countries and the PASTA Analysis. The tourism numbers of the Czech Republic, Hungary, Poland and Slovakia show an increase over the past years and a high importance for the countries' economies. Even though domestic tourism makes up the larger share in some countries, incoming tourism has a significant impact on the overall tourism revenue. Given the current circumstances and total slump in revenue, the consequences are not predictable at the moment. However, with possible ongoing border closures and no going back to normal international tourism anytime soon, the focus should be on promoting and increasing domestic tourism. The conducted PASTA Analysis dealt with that issue. Each Visegrad Group country should therefore focus on its own tourism industry to generate income again as soon as possible to avoid an even bigger collapse. Due to their relatively small size and number of inhabitants, new tourism strategies and promotion campaigns can and have to be economically priced. Even small projects and ideas might have a positive impact on the current situation. Increased activities on social media channels as well as bundling regional strengths to attract more tourists might be quite easy but effective methods. The following paragraph gives a recommendation on what could be done to achieve that.

Even though the promotion of domestic tourism in the countries of the Visegrad Group is a big challenge, it also offers great opportunities and success depending on a smart strategic application. The objective should be to direct the flow of tourist visitors in a targeted direction through customized travel packages. In tourism, this is achieved by managing cooperation between service providers. Stakeholders are providers of individual tourist services. These actors include for example the destination management organizations (DMO), travel agencies, providers of accommodations, entertainment industries, cultural and sport agencies, event organizers, the local retail and municipalities. The result is a complex network of different players in domestic tourism.

According to Frey et al. (2006), networks offer many advantages, which are particularly helpful in the current crisis. The following benefits must be mentioned:

1. Coordination: Share information and resources, define roles, frequent communication, shared decision making;
2. Coalition: Share ideas and resources, all members have votes in decision making;
3. Collaboration: Members belong to one system, mutual trust and consensus.

The cooperation of service providers leads to synergy effects. Through networking, unique service packages for specific target groups can be created and marketed in domestic tourism. The goal of providing attractive offers for the various domestic target groups in tourism can only be pursued through joint cooperation. This aspect is decisive for the revival of tourism in the countries of the Visegrad Group.

Whenever products and services are developed, target groups must be defined in advance. For this purpose, the domestic travel market must be divided into travel segments. Segmentation also helps to promote the packages in the relevant marketing channels afterwards.

Based on the research of a New Zealand tourism company, the domestic travel market can be divided into the following eight segments (DGIT, 2016):

1. Escape & Reward.
2. Learn & Understand.
3. Explore Nature.
4. Beer, Food & Music.
5. Adventure & Challenge.
6. Watching or Participating.
7. Fun with kids.
8. Family.

Each group has different demands and expectations of the travel package. The task of the network is to satisfy the target group's specific demand in domestic tourism by creating offers. When creating an offer, it is important to analyze the available travel budget of the target groups. The choice of transport (bus, train or plane), accommodation (hotel, hostel or apartment) and trip duration (average overnights) also depends on this aspect. In this context, the integration of the transport and accommodation companies in the network simplifies communication and cooperation between stakeholders. The choice of destination is important as well. While for example travelers from the „Explore Nature“ segment tend to travel to rural regions, tourists from the „Beer, Food & Music“ segment prefer to spend their holidays in cities (*ibid.*). Domestic tourism activities must also be bundled to address the specific target groups. Through networking of event organizers, entertainment providers, local retail and cultural and sport facilities, unique offers can be created and the domestic tourism will be made more attractive.

Probably the greatest challenge is assumed by the DMO, because the organization is responsible for marketing activities. Each target group must be addressed in a different way. The DMO primarily uses media channels for this purpose. Depending on the respective target group, different channels must be used. The various channels are consisting of social networks (Facebook, Instagram, YouTube, Snapchat etc.), TV (Pay TV and Non Pay TV), radio, magazines, but also companies from the respective travel industries (e.g. outdoor equipment supplier) for the touristic target group „Explore Nature“ (*ibid.*).

After marketing come sales. Travel agencies are responsible for handling the sale of domestic travel packages. These are either local travel agencies or online providers. Certain target groups such as travelers of the segment „Learn & Understand“ or „Fun with kids“ prefer to book their trips offline by regional tourism sites. Other groups tend to book online via TripAdvisor or other online travel agencies (*ibid.*).

It is important to note that the travel market in each country of the Visegrad Group is composed differently. Due to the external factors of each country, the supply and demand in the various domestic travel segments is not the same. The challenge of the network actors is to recognize the specific circumstances, accept them and address the challenge by creating unique offers. Only through a cooperation of different touristic stakeholders, domestic tourism can be promoted and important incomes in terms of the missing international tourism through the corona crisis will be compensated.

But since this crisis is very dynamic and volatile, a future development is hard to predict. The previous paragraphs were aimed to give an idea on a possible strategy to promote domestic tourism in each of the four Visegrad Group countries. However, the next few months will show how this crisis will progress and how the countries will react and adapt to the constantly changing situation.

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