



DIRECTIONS FOR TOURISM DEVELOPMENT UNTIL 2015



Ministry of Sport and Tourism
Republic of Poland



Ministry of Sport and Tourism
Republic of Poland

Directions for Tourism Development until 2015

**Fragments of document
adopted by the Council of Ministers
on 26 September 2008**

TABLE OF CONTENTS

I. SUMMARY	3
II. STRUCTURE OF TOURISM MANAGEMENT IN POLAND	6
III. STRATEGIC ASSUMPTIONS – MISSION, OBJECTIVES, PRIORITY AREAS AND ACTIVITIES	14
PRIORITY AREA I – A HIGHLY COMPETITIVE TOURIST PRODUCT	20
Operational objective I.1. – Creating and developing competitive tourist products	22
Operational objective I.2. – Developing tourism infrastructure	23
Operational objective I.3. – Integration of products and tourist offers of the regions	23
Operational objective I.4. – Development of entrepreneurship and of the activities of organisations in the field of tourism	24
Operational objective I.5. – Development of major types of tourism	25
PRIORITY AREA II – DEVELOPMENT OF HUMAN RESOURCES CONTRIBUTING TO TOURISM DEVELOPMENT	27
Operational objective II.1. – Preparation of the operational personnel in tourism economy	29
Operational objective II.2. – Development of tourism education and social tourism	30
Operational objective II.3. – Monitoring the needs of tourism industry in terms of human resources	30
PRIORITY AREA III – MARKETING SUPPORT	33
Operational objective III.1. – Improvement of tourist information system	35
Operational objective III.2. – Increasing the effectiveness of marketing activities in tourism	36
PRIORITY AREA IV – SHAPING THE TOURIST SPACE	38
Operational objective IV.1. – Shaping the development of tourism so as to preserve and increase the value of tourist space	40
Operational objective IV.2. – Increasing the tourist accessibility of regions through the development of transport	40
IV. STUDIES IN THE FIELD OF TOURISM ECONOMY	43
V. MONITORING AND EVALUATION SYSTEM	47
VI. SOURCES OF DIRECTIONS... FINANCING AND TASKS CONTRACTORS ...	50

SUMMARY



I. SUMMARY

Tourism is one of the fastest growing sectors of economy both in the European Union and in the world, and its socio-economic importance can be expressed in figures (contribution to GDP, number of work places created) as well as in equally significant values that cannot be measured, connected, among others, with preventing social exclusion, upbringing and education, removing mutual dislikes and prejudices, creating the image of the country and its regions, creating conditions for the development of local entrepreneurship.

Interdisciplinary and regional character of tourism became the starting point for preparing Directions for Tourism Development until 2015 and defining the priority areas and directions for development. In order to gain a significant competitive position in the current tourism market it is necessary to adopt a multidimensional approach, which will result in creating products that combine various elements, such as: attractions, services, infrastructure, communication availability, information, etc. The development of tourism largely depends on the ability to use cultural and environmental assets of the country and its regions, as well as to create and promote new attractions. Constant training of staff and their professionalization is a prerequisite for reaching an appropriate pace of tourism development and ensuring an appropriate quality of services. The creation of products that make use of the specific advantages of Polish and European regions in a sustainable way will lead both to strengthening the position of well-known Polish destinations and to the development of tourism in less developed and remote regions. The analysis of tourism economy shows that its harmonious development is not possible without improving the image of Poland both in the European Union and in the world, and without interaction and integrated cooperation between strong (organisationally, professionally and financially) public and private entities.

The main assumption is to treat tourism as an area closely linked to numerous development processes and to shape it in a way that will be consistent with other socio-economic objectives of the country's development. The document takes into account not only the internal cohesion of the undertaken measures, but also the synergy effect between tourism and environment, culture, social development, infrastructure, etc. According to strategic assumptions, making Poland an attractive country for domestic and foreign tourists will result in tourism becoming an important tool of socio-economic development of regions.

Directions for Tourism Development until 2015 will be implemented at two levels:

- At the level of tasks recommended by the Interministerial Team for coordinating the tasks of the Government included in *Directions for Tourism Development until 2015*, which is going to be appointed by the Ruling of the President of the Council of Ministers (Level I)
- At the level of tasks recommended to all entities acting for tourism development (Level II).

A detailed analysis of the condition of Polish tourism, compared with world and European trends, lead to defining priority areas for strengthening the dynamics and harmony of tourism development, covering:

- a highly competitive tourist product,
- development of human resources contributing to tourism development,
- marketing support,
- shaping the tourist area.

As regards the tourist product, the following measures are recommended: measures for creating innovative and competitive products meeting the requirements of sustainable development, stimulating cooperation between numerous entities – also at the interregional level – for integrating the tourist offer, supporting the types of tourism with the highest chances for development as a result of market conditions and their own assets as well as measures aimed at implementing and promoting modern solutions supporting quality. The basis for the implementation of tasks included in this priority is a constant monitoring of the needs of recipients, market trends, the competitive position assessment and adjusting an offer to changing conditions.

As regards the development of human resources, the following measures are recommended: measures intended to prepare professional tourism staff, raise qualifications of managing staff and operational personnel, introduce the professional qualifications system, and to educate social personnel. In addition to preparing staff for servicing tourist traffic, another equally important issue is to widely educate recipients of tourist services in order to increase interest in spending their free time actively and to use cultural and environmental resources in a conscious and responsible way.

As regards marketing, the following measures are recommended: measures aimed at creating a coherent promotion system making use of the opportunity to organise common promotion at the European Union level and developing an integrated system of marketing activities as an aspect contributing to the increase in the number of foreign and domestic tourists, enhancing the tourist information system, and supporting the development of studies in the field of tourism.

As regards shaping the tourist area, measures for sustainable regional development are recommended. The implementation of the priority is focused on shaping the tourist area in accordance with the principles of environmental protection, increasing the possibility to absorb tourists on areas attractive in terms of tourism by means of renovating or rebuilding and developing relevant infrastructure, and increasing the communication availability of tourism regions.

The realisation of the objectives of individual areas is aimed at developing the tourism industry, based on modern, competitive and high quality products and tourism services, and respecting the principles of sustainable development. It is especially important in the face of the fact that Poland is to organise the 2012 UEFA European Football Championship final tournament. It is envisaged that the organisation of this event will increase the tourist traffic to Poland, provide a great opportunity to present our country and contribute to the improvement of the image of Poland in the world.

The financing of *Directions ...*, as well as its implementation, will involve two levels:

1. Financing of tasks recommended by the Interministerial Team for coordinating the tasks of the Government included in *Directions for Tourism Development until 2015*, which is going to be appointed by the Ruling of the President of the Council of Ministers (Level I).

It is envisaged that the tasks recommended by the Interministerial Team for coordinating the tasks of the Government included in *Directions for Tourism Development until 2015* will be financed in 2008 from the resources allocated under the Budget Act to the Minister Competent for Tourism.

It is planned that as of 2009 the tasks concerning the implementation of *Directions...* as well as financial expenditure will be recommended annually to competent ministers by the Interministerial Team. The tasks will be financed by the Minister Competent for Tourism and other Ministers within the resources provided for in the Budget Act for a given year.

In the Budget Act for 2008 of 23 January 2008 (Dz. U. No 19 item 117), the amount of PLN 49,066,000 was allocated for part 40 of the State Budget – “Tourism”.

The Office servicing the Minister of Tourism provides service for the Team.

2. The tasks recommended to all entities acting for tourism development (Level II) will be financed within the resources of the participants of the tourist system, i.e. Government administration bodies, territorial self-government entities of all levels, business entities and their associations, universities, entrepreneurs doing business in the field of education and experts, regional and local tourist organisations, non-governmental organisations, local communities. The resources from the European Union structural funds in 2007–2013 will also provide significant support for tourism development in Poland.

The realisation of objectives provided for in *Directions...*, along with their becoming part of the realisation of the Polish Government’s objectives, will be possible after reaching the level of selected macroeconomic indicators, such as the tourism economy contribution to creating GDP, participations of the Poles in tourist trips and the increase in the number of foreign tourists and visitors coming to our country.

Furthermore, in order to monitor the effects of the tasks implemented by the Interministerial Team, the President of the Interministerial Team (minister competent for tourism) will prepare an annual report of the Team’s operations and then submit it to the Council of Ministers.

The minister competent for tourism will also prepare the following reports on the condition of tourism economy:

- in 2012 on the condition of tourism economy in 2007–2011
- in 2016 on the condition of economy in 2012–2015.

An important assumption is that *Directions...* will be dynamically modified and adjusted to changing conditions. It means that the presented document shall be treated as an opening of the strategic process and entering the path of systemic management of tourism development in the long run.

**STRUCTURE OF TOURISM
MANAGEMENT IN POLAND**



II. STRUCTURE OF TOURISM MANAGEMENT IN POLAND

Minister competent for tourism is the Minister of Sport and Tourism. The Act of 4 September 1997 on government administration sections, Article 27 a, lays the following responsibilities upon him:

- tourism management of the country;
- mechanisms of tourism market regulation.

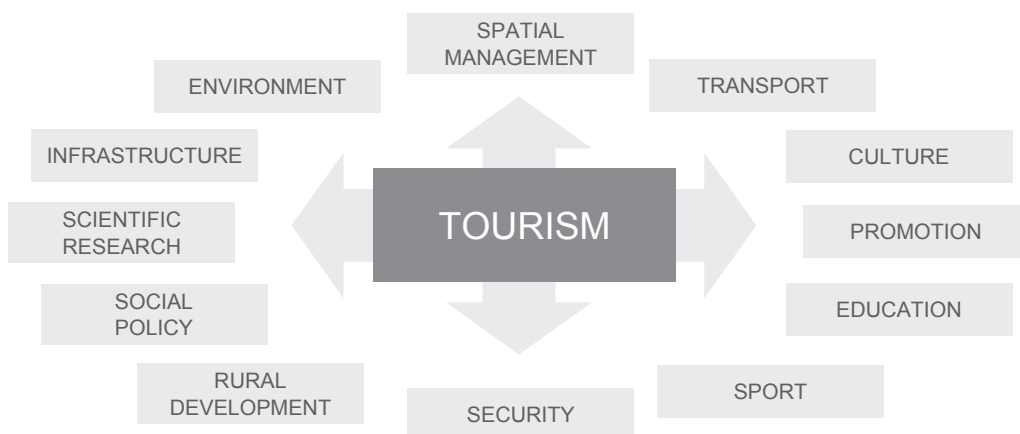
These tasks are reflected in the Ordinance of the Prime Minister of 16 November 2007 on the detailed scope of activity of the Minister of Sport and Tourism (Dz. U. No 216, item 1602), Article 1(2)(2), which delegates the management of the “tourism” section of the government administration to the Minister. State budget expenditures allocated for the “tourism” section cover:

- tourism promotion;
- the remaining activity (in particular supporting, marking and maintaining tourist routes).

The minister competent for tourism is also the leading minister for the purposes of the Act of 29 August 1997 on tourist services (Dz. U. of 2004 No 223 item 2268 as amended) and the Act of 25 June 1999 on Polish Tourist Organisation (Dz. U. No 62 item 689 as amended). Pursuant to this Act, the minister competent for tourism supervises Polish Tourist Organisation (Polska Organizacja Turystyczna – POT). The scope of POT activity includes mainly:

- promotion of Poland as a country attractive for tourists;
- ensuring the operation and development of Polish tourist information system at home and abroad;
- initiating, assessing and supporting development plans for tourist infrastructure renovation or reconstruction.

Nevertheless, the problem of tourism development is complex, because related phenomena and issues are diversified. Tourism is not a homogeneous, compact field of economy. It consists of several dozen separate economy sectors, which often causes organisational, production, legal and technological implications.



Many tasks and activities which directly or indirectly affect the development of tourism in Poland are within the competence of other ministries and central bodies. This is reflected in Table 8, which presents statutory responsibilities of ministers and directors of central bodies relating to tourism development in Poland.

Table 8. Responsibilities of individual ministers/directors affecting the development of tourism

NO	MINISTER/ DIRECTOR	RESPONSIBILITIES OF INDIVIDUAL MINISTERS/ CENTRAL BODIES' DIRECTORS AFFECTING THE DEVELOPMENT OF TOURISM
1.	Minister competent for construction industry, spatial economy and housing.	<ul style="list-style-type: none"> ■ creating conditions and instruments for organising spatial order and architectural policy of the country ■ renovation of towns and cities and creating urban policy ■ carrying out matters of spatial economy and integrated spatial development management, including creating regulations on spatial planning and implementing state spatial economy ■ carrying out spatial development monitoring at the state level ■ inspiring and supporting scientific research, studies and programmes in the field of spatial economy
2.	Minister competent for public finance	<ul style="list-style-type: none"> ■ creating tax and local payments system ■ creating a system of guarantees, pledges and loans ■ implementation of financial policy
3.	Minister competent for economy	<ul style="list-style-type: none"> ■ responsibilities concerning instruments of economic development support, their coordination, implementation supervision and monitoring ■ creating conditions supporting public-private partnership ■ coordinating tasks related to the improvement of regulations and implementing the system of modern economic regulations ■ responsibilities related to preparing and monitoring medium-term strategies and economic development programmes, in particular in the scope of competitiveness, innovation and entrepreneurship. ■ actions ensuring free flow of goods and free provision of services by systems operating under the Internal Market of the European Union ■ carrying out matters related to implementation, coordination and monitoring of programmes and actions addressed directly to small and medium-sized enterprises, aimed at entrepreneurship development ■ carrying out matters related to the implementation of instruments supporting investments, including direct foreign investments ■ carrying out matters related to implementing export policy instruments ■ carrying out matters related to cross-border cooperation
4.	Minister competent for maritime management	<ul style="list-style-type: none"> ■ creating conditions for development of sea transport, ports and harbours ■ responsibilities within the scope of maritime administration
5.	President of National Water Management Authority	<ul style="list-style-type: none"> ■ creating the policy of protection and rational use of water resources, maintenance of inland surface waters owned by the Treasury with their technical infrastructure and supervision of tasks related to construction, modernisation and maintenance of inland waterways
6.	Minister competent for culture and protection of national heritage	<ul style="list-style-type: none"> ■ execution and coordination of tasks in the scope of historic monuments' protection ■ undertaking and supporting actions promoting Polish culture abroad ■ implementation and coordination of inter-department cultural education programmes including cultural education of youth and children, and actions facilitating the participation of disabled people in the cultural life ■ preparing and updating information on periodic events organised in Poland ■ responsibilities under "National Spatial Arrangement Policy", including coordination of developments on spatial arrangement of cultural heritage resources and concepts of their use ■ carrying out actions for the protection of folk culture heritage

NO	MINISTER/ DIRECTOR	RESPONSIBILITIES OF INDIVIDUAL MINISTERS/ CENTRAL BODIES' DIRECTORS AFFECTING THE DEVELOPMENT OF TOURISM
7.	Minister competent for physical culture and sports	<ul style="list-style-type: none"> ■ supporting actions for active leisure of children and youth ■ preparing sports infrastructure strategies, preparing and publishing technical conditions of sports facilities construction ■ participation in works on plans for the country spatial management in the field of physical culture ■ cooperation with the Polish Committee for Standardisation and the Polish Centre for Testing and Certification in the scope of security and certification of sport equipment ■ defining priorities and tasks concerning participation of the society in regular sports activity, as well as initiating and coordinating actions under government and environment programmes ■ promotion of sport in the society
8.	Minister competent for science	<ul style="list-style-type: none"> ■ coordination of works related to innovative education introduction ■ coordination of execution of the regional policy for innovation growth premises ■ coordination of works on preparing legal and organisational solutions concerning cooperation between scientific units with enterprises ■ preparing projects of undertakings and programmes relating to innovation development and cooperation between science and economy
9.	Minister competent for education	<ul style="list-style-type: none"> ■ supporting the educational function of schools and institutions in the scope of: shaping cultural, regional and European identity, promotion of health and health-conscious behaviour, creating the ability of active leisure as well as organising extracurricular classes and organised forms of leisure for children and youth, tourism for children and youth ■ defining general education programme bases ■ defining education programme bases for particular profiles of general-professional education and education for particular professions ■ classification of professions in vocational education ■ principles of holding exams confirming professional qualifications ■ determining conditions and course of organisation and implementation of practical profession trainings for students ■ organisational and programme assumptions and principles of teachers' training ■ defining the policy of mutual education recognition, in particular principles and course of recognition of diplomas awarded abroad
10.	Minister competent for labour	<ul style="list-style-type: none"> ■ carrying out matters concerning employment and counteracting unemployment, work relationships and work conditions, salaries and employee benefits
11.	Minister competent for social policy	<ul style="list-style-type: none"> ■ carrying out matters concerning social assistance and family benefits, including social benefits, employment, social rehabilitation and rehabilitation of the disabled
12.	Minister competent for rural development	<ul style="list-style-type: none"> ■ protection of the cultural heritage of rural areas ■ social and vocational activation of inhabitants of rural areas ■ development of entrepreneurship and labour market in agriculture and in rural areas
13.	Minister competent for regional development	<ul style="list-style-type: none"> ■ setting up EU funds management system that ensures suitable and timely implementation of financial programmes from EU funds ■ coordinating implementation of the National Cohesion Strategy and operational programmes for 2007-2013 and monitoring EU funds management system in order to guarantee suitable and timely execution of programmes financed by the EU, as well as monitoring the execution of National Development Strategy 2007-2015 with focus on regional development
14.	Minister competent for the Treasury	<ul style="list-style-type: none"> ■ qualification of state enterprises and companies for commercialisation and privatisation ■ carrying out processes of direct privatisation of state enterprises for which the Minister is the founding body ■ drawing up draft privatisation plans and determining planned incomes from privatisation for the coming years ■ supervising, among others, tourist enterprises and health resorts

NO	MINISTER/ DIRECTOR	RESPONSIBILITIES OF INDIVIDUAL MINISTERS/ CENTRAL BODIES' DIRECTORS AFFECTING THE DEVELOPMENT OF TOURISM
15.	Minister competent for internal affairs	<ul style="list-style-type: none"> ■ carrying out matters related to crisis management and civil planning for the needs of general security (including: life-saving and population protection, supervision of the State Fire Service and functioning of the state emergency and fire-fighting system, supervision of mountain rescue and lifeboat service, counteracting and eliminating the results of terrorist attacks and other asymmetric threats ■ carrying out matters related to issuing identity cards and passports ■ carrying out matters concerning the protection of security and public order, and protection of the state border and border traffic control ■ preparing programmes, initiatives and solutions in the scope of counteracting crime and social pathologies generating crime
16.	Minister competent for foreign affairs	<ul style="list-style-type: none"> ■ promotion of the Republic of Poland and the Polish language abroad and creating the image of the country ■ managing diplomatic posts and consular offices ■ maintaining relationships of the Republic of Poland with other countries and international organisations ■ representing and protecting the interests of Poland, Polish citizens and Polish legal entities abroad
17.	Minister competent for higher education	<ul style="list-style-type: none"> ■ awarding, suspending, withdrawing and re-awarding the rights to run faculties, macro-faculties and inter-faculty studies at public and private universities ■ coordinating and running works on higher education system modification
18.	Minister competent for environment	<ul style="list-style-type: none"> ■ coordinating matters related to programme documents concerning environmental protection ■ carrying out matters concerning the sustainable use of minerals ■ initiating, preparing and monitoring planning solutions as well as technical and technological solutions to create and support environmental protection in Poland ■ preparing principles of investment locations according to sustainable development rules in the context of spatial management plans ■ determining emission and environment quality standards, and principles for their monitoring ■ implementing the state ecology policy in the scope of nature and landscape protection, national strategy of nature protection and biodiversity protection programme ■ carrying out matters concerning the organisation and operation of the Natura 2000 network ■ carrying out matters in the scope of the Minister's supervision of national parks, including investments carried out by the national parks
19.	Minister competent for transport	<ul style="list-style-type: none"> ■ creating the state transport policy, preparing strategic documents on transport and ensuring coordination of strategic plans in this scope. ■ creating road transport policy and carrying out road transport matters, preparing road transport development programmes ■ creating civil aviation policy and carrying out civil aviation matters, preparing civil aviation development programmes ■ creating rail transport policy, analysing investment assumptions of railway infrastructure, implementation of tasks that concern the functioning of the Polish railways in the EC railway system, as well as cooperation with foreign rail transport institutions ■ matters concerning inland water transport, river ports and harbours, including port infrastructure ■ matters that concern creating conditions for the development of access to the Internet
20.	Minister competent for health	<ul style="list-style-type: none"> ■ carrying out matters related to health resorts and resort health service ■ responsibilities related to the Minister's supervision of national medical rescue ■ creating conditions for further improvement of health security of tourists staying on the territory of Poland ■ carrying out matters in the scope of cooperation with the Chief Sanitary Inspectorate

NO	MINISTER/ DIRECTOR	RESPONSIBILITIES OF INDIVIDUAL MINISTERS/ CENTRAL BODIES' DIRECTORS AFFECTING THE DEVELOPMENT OF TOURISM
21.	President of the Office of Competition and Consumer Protection	<ul style="list-style-type: none"> ■ carrying out anti-trust proceedings in cases of restrictive practices: abuse of a dominant position on the market and unlawful agreements ■ carrying out proceedings and issuing decisions in cases of practices infringing collective interests of consumers ■ actions aimed at eliminating unlawful contractual provisions from legal transactions
22.	President of the Central Statistical Office	<ul style="list-style-type: none"> ■ organising and carrying out statistical research, including censuses ■ participation in methodological works in individual fields of statistics and informing on the methodology and scope of research carried out as a part of public statistics ■ popularising resultant statistical information obtained from public statistics research, including basic values and indicators ■ carrying out works for the needs of regional statistics and national calculations

Taking the above into account, it is clear that many tasks conditioning tourism development lay beyond the responsibilities of the minister competent for tourism. Moreover, many tasks affecting tourism development are within the competence of local governments.

The scope of activity of **voivodship government** in the field of tourism includes:

- keeping and controlling the register of tour operators and tourism intermediaries,
- granting licences of a tour leader and a tourist guide,
- classifying hotel facilities into particular kinds and categories and controlling them,
- running institutions of physical culture and leisure of regional nature, coordinating activities and supporting financially the voivodship-range units of physical culture, sports and tourism and voivodship tourist and sports organisations,
- cooperation within the scope of tourism development, creating new tourist products and promoting tourism potential by, among others, participation of the voivodship government in the Regional Tourist Organisation,
- coordination and development of tourist information network in the voivodship,
- cooperation with tourism institutions of national, voivodship, poviats and gmina level,
- organisation and supervision of leisure for children and youth,
- execution of tasks in the scope of physical culture and tourism at school (including the so-called "green schools").

The competence of **poviat** in the scope of tourism includes:

- running institutions of physical culture, tourism and leisure on the territory of the poviat,
- running school youth hostels,
- keeping records and supervision of associations operating in the field of physical culture, sport unions and tourist associations located in the poviat and providing them with financial support,

- financial support for organisation of sports, leisure and tourist events of high level taking place in the powiat,
- cooperation in the scope of spatial development planning and providing the territory with sports, leisure and tourist facilities,
- coordinating actions and supporting mountain rescue and lifeboat service,
- organisational and financial support for tourist organisations operating on the territory of the powiat,
- promotion and cooperation in the field of professional tourism and other forms of active tourism in the powiat,
- execution of tasks in the scope of physical culture and tourism at school (including the so-called “green schools”),
- cooperation within the scope of promotion of tourism development in the powiat, with particular account of cooperation with Regional and Local Tourist Organisations.

The competence of **gminas** in the field of tourism comprises mainly:

- keeping records of campsites and other facilities providing hotel services, and the right to control them,
- maintenance, renovation, reconstruction and extension of sports and tourist facilities and equipment on the territory of the gmina,
- creating advantageous conditions for starting tourism business activity on the territory of the gmina,
- running institutions of physical culture, tourism and leisure on the territory of the gmina,
- financial support for physical culture associations, sport unions and tourist associations located on the territory of the gmina,
- planning the spatial development and provision of sports, leisure and tourist facilities on the territory,
- organisational and financial support for tourist associations and organisations operating on the territory of the gmina,
- extension and maintenance of technical and social infrastructure (e.g. transport) of voivodship importance,
- execution of tasks in the scope of physical culture and tourism at school (including the so-called “green schools”),
- actions for environment and cultural heritage protection,
- promotion of the gmina.

Thus, multilateral cooperation of government administration, local government units, business entities and their associations, non-government organisations and local communities is necessary for consistent development of tourism in Poland. To sum up, the following units and organisations are participants of the tourism system:

- the Government of the Republic of Poland, particularly the minister competent for tourism;
- Polish Tourist Organisation with regional and local tourist organisations;
- local government of all levels and local communities;
- business entities and their associations, including in Particular Polish Chamber of Tourism, Chamber of Commerce of Polish Hotel Industry, Polish Chamber of Hotel Industry, Polish Chamber of Youth Tourism, "Polish Resorts" Chamber of Commerce, and National Council of Chambers of Tourism in Poland;
- universities, enterprises carrying out education activities and experts;
- non-government organisations, including in particular Polish Tourist Country-Lovers Society (PTTK), Polish Youth Hostels Association, Polish Camping and Caravanning Federation, Polish Federation for Rural Tourism – Gospodarstwa Gościnne, Polish Hotel Trade and Tourism Association, The Conferences and Congresses in Poland Association, Association of Polish Spa Communities.

**STRATEGIC
ASSUMPTIONS – MISSION,
OBJECTIVES, PRIORITY
AREAS AND ACTIVITIES**



III. STRATEGIC ASSUMPTIONS – MISSION, OBJECTIVES, PRIORITY AREAS AND ACTIVITIES

The content and structure of *Directions...* have been based on four sets of assumptions, which constitute the foundation of the document. These assumptions are concerned with issues related to:

- shaping the relationship between the development of tourism and the socio-economic development of the country,
- creating agreement between various entities on the development of tourism on the basis of amalgamating activities and potential,
- providing for flexibility resulting in adjusting provisions to changing circumstances in the whole process of implementation,
- promoting sustainable consumption, shaping public health through tourism, supporting actions that contribute towards a reduction of the pressure on the global climate – especially in transport, integrating the community around local tourist products, and protecting environmental resources and services provided by ecosystems.

The realisation of these assumptions is related to treating tourism and its objectives broadly, which means not just taking into account market concerns, but aiming at defining tourism's role in both the economic and social development of the country. In this context, *Directions...* is aimed at achieving such results as:

- making use of untapped or misused potential, in particular, the use of human, cultural and environmental potential;
- strengthening social capital, appointing local leaders, developing beneficial attitudes and values;
- creating new chances for areas of lower growth and enhancing the social and economic cohesion of the country and its regions;
- emphasising and retaining priceless cultural and environmental values;
- stimulating entrepreneurship and innovative attitudes connected with the ability to create new products and services and to improve them continuously;
- shaping a positive image of Poland and its regions, which translates into an increase in its attractiveness as a place of residence and for investments.

The assumptions have been based upon a mission statement for the development of -tourism in Poland, which provides a description of the role of tourism in the socio-economic development of the country. The agreement between various entities on the development of tourism has been reflected mainly in the creation of the document in partnership. A number of workshops, meetings and consultations, which took place while the document was being drafted, helped contribute to an agreement on the most important issues or to a clarification of all the disputed points. Tasks set out in *Directions...* are aimed at the development of tourism on the basis of amalgamating the activities and the potential of numerous entities.

It should be highlighted that through *Directions...* the rule of social cohesion is implemented, which is a rule of fair access of individual social groups to tourist services, as well as the rule of cohesion from a territorial perspective.

The Directions... consists of a number of provisions concerning the shaping of tourist functions in relation to international conditions. It originates from the fact that tourist offers should, at least in part, be directed to global markets, and from the fact that there is an ever growing trend among recipients in Poland to opt for foreign offers. The market of tourist services has become fully globalised. Hence, the analyses carried out include, as far as possible and taking into account the available information base, the development of national tourist functions in relation to global competitors.

Summing up the presented assumptions it can be concluded that the development of tourism should aim at the realisation of the three basic values that make up the **MISSION STATEMENT** for the development of tourism in Poland.

- **tourism will be developed as an area synergic with other goals important from the point of view of the development of a country, conducive to generating a significant part of the domestic product and to building a positive image of Poland among its citizens as well as reinforcing this image abroad;**
- **tourism will be an area that emphasises and efficiently uses the valuable potential of the country, particularly the heritage of culture and tradition as well as the richness of Polish nature, and at the same times respects the principles of sustainable development;**
- **Poland will be attractive in terms of tourism for both domestic and foreign tourists, with an effective tourism industry and modern, competitive, high-quality tourist products and services.**

The pace and profile of the development of tourism in Poland are so far not fully satisfactory. The effect of tourism on the socio-economic development of the country is very small compared to its potential and does not live up to the expectations. Therefore, the process of shaping tourism requires a combination of a support mechanism and a market mechanism. Both these mechanisms are not to eliminate or replace each other, but are to be components of a complementary system. The results of the functioning of this system should be strengthening the dynamics of positive processes (support to the market mechanism) and creating new phenomena.

For this reason, **the ultimate objective is to create legal, institutional, financial and personnel conditions conducive to the development of tourism, which would enhance the socio-economic development of Poland, and to increase the competitiveness of each region and the country as a whole, while simultaneously retaining cultural and environmental values.**

Whereas the **guiding objectives** of the development of tourism include:

- a) **increased economic significance of tourism for the economic development of Poland;**
- b) **enhanced quality of life of Polish citizens and of the environment;**
- c) **cooperation and integration to the benefit of tourism and tourism-related environments in social, spatial and economic aspects.**

Directions for Tourism Development until 2015 will be implemented at two levels:

A. At the level of tasks recommended by the Interministerial Team for coordinating the tasks of the Government included in Directions for Tourism Development until 2015, which is going to be appointed by the Ruling of the President of the Council of Ministers (Level I)

B. At the level of tasks recommended to all entities acting for tourism development (Level II)

A. Tasks recommended by the Interministerial Team for coordinating the tasks of the Government included in Directions for Tourism Development until 2015, which is going to be appointed by the Ruling of the President of the Council of Ministers (Level I)

With a view to ensuring an effective realisation of the tourism policy in Poland and having regard to the interdisciplinary and multidimensional character of tourism development, the President of the Council of Ministers plans to appoint the **Interministerial Team for coordinating the tasks of the Government included in Directions for Tourism Development until 2015**, which should be comprised of high-ranking representatives of those ministries and central departments whose scope of activity has a significant impact on the development of Polish tourism. The Minister Competent for Tourism would be the representative of the Team and the coordinator of its activities.

	It is envisaged that the TASKS OF THE TEAM will include initiating, assessing and making recommendations regarding:
1.	proposals for legislative solutions in respect of legislative regulations in force which affect the development of tourism
2.	lines of actions aimed at strengthening the competitiveness of the Polish tourist product
3.	actions for enhancing cooperation in the field of tourism promotion in Poland and shaping its image as an attractive country in terms of tourism
4.	lines of actions for promoting tourism investments
5.	changes in respect of tourism education standards to ensure market needs are met
6.	schemes for increasing the participation of Polish citizens in national tourism, especially for increasing the accessibility of services for children and youth, the disabled, the elderly and families
7.	changes related to transport accessibility of places attractive to tourists
8.	actions related to the preparation of the tourism sector in Poland for cultural and sporting events that are hosted in Poland, such as the 2012 UEFA European Football Championship

The detailed scope of the tasks of the *Interministerial Team*... will be defined in the Ruling of the President of the Council of Ministers by which the Team will be appointed.

In addition, the thematic issues which are envisaged to be within the scope of the responsibilities of the Interministerial Team for coordinating the tasks of the Government, included in *Directions for Tourism Development until 2015*, will include:

- standards and quality norms for tourism, gastronomy, the hotel sector, transport, health resorts in Poland in relation to European and global norms and standards (including those of the United Nations World Tourism Organisation);
- standards for the provision of services in order to ensure effective protection of consumer rights in the tourism services market;
- development of the national tourism product*, as well as public-private and public-social partnerships in tourism in order to enhance effective management;
- the issue of the role of tourism, recreation, sport, culture and entertainment in creating points of economic growth that generate regional development and an increase in the growth of employment;
 - promotion of Poland as a country attractive to tourists by means of:
 - preparation of a marketing strategy by the *Polish Tourism Organisation (POT)* for the tourism sector in Poland for the years 2008–2015
 - introduction of effective methods of cooperation with regions in order to increase the promotion of Polish regions both on the national market and abroad;
 - development of the network of tourist information aimed at creating the National System for the Reservation and Distribution of Services;
- rules of sustainable development in tourism and their popularisation in tourist regions and in the tourist sector;
- issues related to new technologies and innovation in tourism;
- utilisation and popularisation of the potential of Poland that comes from its membership in international organisations and the fact that Poland is a party to bilateral and multilateral agreements facilitating cooperation to the benefit of tourism, as well as promoting tourism undertakings at the interregional level that are of national and international significance;
- enhancing communication with all participants of the tourism market through the organisation of periodic consultation and advisory meetings – the Polish Tourism Forum.

The above mentioned tasks are mainly aimed at:

- focusing efforts on a number of selected strategic objectives that the Government has competencies in;
- activating of measures supporting the development of tourism that are political, organisational and substantive in character and lie within the scope of the competencies of individual ministers;
- supporting activities that benefit tourism and tourism-related sectors;

* on the basis of existing concept contained in the *Strategies for the development of the national tourist product prepared under the project PHARE Tourin I and II*.

- continuing the process of liquidating barriers to the development of tourism and the tourism-related environment at the national level.

B. Tasks recommended to all entities acting for tourism development (Level II)

The level II assumptions presented in *Directions...* will be realised in practice through the participation of all entities engaged in the development of tourism in Poland within four priority areas:

1 Priority area 1 — A highly competitive tourist product

Operational objectives of priority area 1 include:

- I.1. Creating and developing competitive tourist products.
- I.2. Developing tourism infrastructure
- I.3. Integration of products and tourist offers of the regions
- I.4. Development of entrepreneurship and of the activities of organisations in the field of tourism
- I.5. Development of major types of tourism

2 Priority area 2 — Development of human resources contributing to tourism development

Operational objectives of priority area 2 include:

- II.1. Training the operational personnel in the tourism industry
- II.2. Development of tourism education and social tourism
- II.3. Monitoring the needs of the tourism sector in terms of human resources

3 Priority area 3 — Marketing support

Operational objectives of the priority area 3 include:

- III.1. Enhancing the tourist information system
- III.2. Increasing the effectiveness of tourism marketing activities, in particular promotion.

4 Priority area 4 — Shaping the tourist area

Operational objectives of the priority area 4 include:

- IV.1. Shaping the development of tourism so as to preserve and increase the value of regions
- IV.2. Increasing the tourist accessibility of regions through the development of transport

The diagram on the next page depicts the assumptions of *Directions for Tourism Development until 2015*, taking into account the mission, ultimate objective, guiding objectives, as well as the tasks implemented at the level I and priority areas implemented at the level II.

MISSION

- tourism is an area synergic with other goals important from the point of view of the development of the country, conducive to generating a significant part of the domestic product and to building a positive image of Poland among its citizens and strengthening its image abroad;
- tourism is an area that emphasises and efficiently uses the county's potential, particularly the heritage of culture and tradition as well as the richness of Polish nature, and at the same times respects the principles of sustainable development;
- Poland is attractive in terms of tourism for domestic and foreign tourists, with an effective tourism industry and modern, competitive, high-quality tourist products and services.

ULTIMATE OBJECTIVE

Creating legal, institutional, financial and personnel conditions conducive to the development of tourism, which would enhance the socio-economic development of Poland, and increasing the competitiveness of each region and the country as a whole, while simultaneously retaining cultural and environmental values.

GUIDING OBJECTIVE 1

Increased economic significance of tourism for the economic development of Poland

GUIDING OBJECTIVE 2

Enhanced quality of life of Polish citizens and of the environment

GUIDING OBJECTIVE 3

Cooperation and integration to the benefit of tourism and tourism related environments in social, spatial and economic aspects

LEVEL I
Interministerial Team for coordinating the tasks of the Government included in Directions for Tourism Development until 2015

It is envisaged that the **TASKS OF THE TEAM** will include initiating, assessing and making recommendations regarding:

- proposals for legislative solutions in respect of legislative regulations in force which affect the development of tourism
- lines of actions aimed at strengthening the competitiveness of Polish tourist product
- actions for enhancing cooperation in the field of tourism promotion in Poland and shaping its image as a country attractive in terms of tourism
- lines of actions for promoting tourism investments
- lines of changes in respect of tourism education standards to ensure that market needs are met
- schemes of actions for increasing the participation of citizens of Poland in national tourism, especially for increasing the accessibility of services for children and youth, the disabled, the elderly and families
- lines of changes related to transport accessibility of places attractive to tourists
- actions related to the preparation of the tourism sector in Poland for cultural and sporting events that are hosted in Poland, such as the 2012 UEFA European Football Championship

LEVEL II
All entities acting for the development of tourism

PRIORITY AREA 1
A HIGHLY COMPETITIVE TOURIST PRODUCT

PRIORITY AREA 2
DEVELOPMENT OF HUMAN RESOURCES CONTRIBUTING TO TOURISM DEVELOPMENT

PRIORITY AREA 3
MARKETING SUPPORT

PRIORITY AREA 4
SHAPING THE TOURIST AREA

PRIORITY AREA I – A HIGHLY COMPETITIVE TOURIST PRODUCT

The creation and development of competitive tourist products, integrated into one cohesive and innovative offer, is one of the most important challenges faced by the tourism sector in Poland. The development of the Polish tourist offer includes undertakings that comprise:

- developing existing tourist products with good prospects,
- creating new tourist products,
- continuously improving tourist products and enhancing their quality,
- integrating products into a comprehensive, diversified, but at the same time synergic offer, achieved, inter alia, through spatial integration of the offer, which involves eliminating unnecessary competition between various areas of the country and creating diversified products that make use of local and regional identities,
- market researching and monitoring, and adjusting the offer to recipients' expectations,
- monitoring of ecological effects of creating products.

The development of products will be achieved not only through the integration of the various elements and components of the tourist product, that is attractions, tourist base, services, transport infrastructure and information into a cohesive whole, but also through the development of a modern infrastructure, improvements to quality and effective investment.

The process of creating and developing the tourist product will take place mainly at the local level in cooperation with local self-governments and the tourism sector, and at the regional level in relation to products that transgress the boundaries of one region. The “from idea to product” concept constitutes the main direction of this area, and the “think globally, act locally” rule should be commonly applied.

The First Priority Area has the following strategic objective:

CS1. Creating and developing integrated and competitive tourism products

A SWOT analysis was carried out with regard to the impact that individual factors might have on the implementation of the strategic objectives. These factors were classified in the following manner;

- strengths and weaknesses: internal factors affecting the competitiveness of the national tourism offer and their positive or negative impact on the implementation of the intended objectives,
- opportunities and threats: external (international) factors and the most important phenomena occurring outside tourism.

The most important factors are presented in the tables below.

Strengths	Weaknesses
<p>S1. rich and relatively well-preserved environment, which can constitute a basis for creating tourist products that are unique in Europe,</p> <p>S2. high attractiveness of the tourist potential of the Polish countryside,</p> <p>S3. significant cultural potential of Poland</p> <p>S4. high tourist potential and experience in fulfilling tourism functions in some of the Polish regions,</p> <p>S5. varied landscape in Poland</p> <p>S6. general accessibility of areas of environmental and cultural value</p> <p>S7. low intensification of land development – numerous possibilities of route selection</p> <p>S8. attractiveness of places of religious worship</p>	<p>W1. too few regional tourist products of a distinctive character</p> <p>W2. lack of a tourist image of Poland and its regions,</p> <p>W3. insufficient, comprehensive tourist package offers,</p> <p>W4. insufficient number of high quality tourist products</p> <p>W5. unfavourable relation between quality of products and their price,</p> <p>W6. lack of an elaborate model of cooperation between public and private partners to develop new products and create tourist offers,</p> <p>W7. unsatisfactory level of internal safety affecting the attractiveness of tourist products,</p> <p>W8. infrastructure deficiencies having a negative impact on the quality of the tourist offer,</p> <p>W9. lack of coordination between local and regional policies affecting the development of the tourist offer,</p> <p>W10. lack of a network of bicycle routes with appropriate designation, marking and accompanying infrastructure,</p> <p>W11. insufficient environment protection infrastructure, especially in respect of water-sewage management and waste management in developed regions and regions with tourist potential,</p> <p>W12. insufficient number of accommodation facilities adapted to contemporary needs and the structure of tourist traffic.</p>

Opportunities	Threats
<p>O1. a number of social trends and changes in the consumption that facilitate generating new tourist products (healthy lifestyle trend, new ways of spending free time, increased intensity of spending free time, growing market of conferences and congresses, and incentive travels („incentives”),</p> <p>O2. increased interest in health-conscious tourism and urban tourism,</p> <p>O3. economic growth resulting in population growth and growing investment and consumer opportunities,</p> <p>O4. interest in health-conscious tourist offers and urban tourism on the part of tourists in the oldest age groups with growing incomes,</p> <p>O5. Poland's membership to the EU as a chance to welcome new tourists,</p> <p>O6. increased interest in forms of common physical activity, especially those which provide cognitive possibilities.</p>	<p>T1. increased competition between major European and international destinations,</p> <p>T2. new trends of passive ways of spending free time, noticeable mainly among young people,</p> <p>T3. limited access to funding sources for tourism, which is disproportionately small in relation to the tourism development needs and creation of new products,</p> <p>T4. degradation of natural resources, especially those of environmental value, including those which are a part of the Natura 2000 network or national system of protected areas,</p> <p>T5. insufficient number of accommodation facilities and other complementary infrastructure used to create and develop tourist products, inter alia, under the 2012 UEFA European Football Championship.</p>

Operational objective I.1. – Creating and developing competitive tourist products

Creating and developing tourist products will contribute to increased synergic effects and the concentration of resources, and as a result it will have a positive impact on the competitiveness of Polish tourism and its ability to meet the ever increasing requirements of consumers. An indication and stimulator of the attractiveness and competitiveness of Polish tourist products is the development of an environmentally friendly brand as an integral part of the tourist image of Poland.

Support is required, inter alia, in the activities concerned with the protection and presentation of cultural goods, creating eco-tourist products, and activities aimed at maintaining the rules of sustainable development in tourism.

In developing tourist products both the effect on the environment and the pro-ecological quality of the services should be taken into account. This requires an extensive introduction of certificates of environmental quality and of labelling as a strategic element of product creation. Thinking in environmental quality terms should translate into the application of indicators concerned with the effective use of environmental resources and the promotion of forms of environmental management. In addition, this will encourage the pro-ecological attitudes of consumers.

Creating tourist products should be accompanied by the rule of limiting, wherever possible, transport needs, minimising the need to use individual means of transport, and supporting alternative solutions in transport systems at the national and regional level, and even at the level of towns or villages or tourist microareas. This should be reflected in the strategy of investment in the development of regions.

The organisation of important cultural and sporting events in Poland, such as the 2012 UEFA European Football Championship, is an opportunity to place more emphasis on the development of a product related to city short breaks.

Whereas in the case of longer tourist stays, the great interest in sporting events should be used to develop and promote active tourism, and to intensify the implementation of the idea of “sport for all”.

The environmentally friendly brand should also be used as a way of realising the content and message of the Polish tourist logo by means of:

- securing natural resources in the amount and quality suitable for the needs of recreation and other fields, especially water resources for their various usage (public baths, health resorts, aqua parks, drinking water, etc.);
- promoting *Ecological labelling for tourist infrastructure facilities* (The European Eco-Label for Tourist Accomodations);
- limiting negative changes in the environment through a reduction of the amount of waste generated and active pro-ecological waste management;
- using existing facilities for tourism infrastructure and for tourist attractions;
- complying with the environmental protection provisions and the reduction of the negative impacts of tourism on areas of environmental value, including areas in the Natura 2000 network, whilst taking into account tourists' preferences;

The implementation of individual operational objectives will be achieved through undertakings as part of the activities described below:

Ideas for activities have been correlated with factors defined for each objective in the SWOT analysis. The activities and potential projects within their scope have been formulated so as to:

- make use of identified internal strengths and opportunities in the environment,
- overcome internal weaknesses and threats to the environment.

Operational objective I.2. – Developing tourism infrastructure

Strengthening the competitiveness of the tourist products developed is a prerequisite for the development of an appropriate tourism infrastructure enabling the commercialisation of tourist products, their appropriate promotion and networking. The infrastructure that is shaped should be of an appropriate standard, should be characterised by transport accessibility and accessibility for the disabled, should have a coherence with the assumed product concept and brand, while its localisation and the technology employed should take into account the conditions resulting from the need to protect the environment. Apart from the basic accommodation and catering infrastructure, it is also necessary to develop recreation and sports infrastructure, which significantly increases the attractiveness of a given location. In addition, during large cultural and sporting events, such as the 2012 UEFA European Football Championship, this infrastructure can be used to create an interesting complementary offer in respect of active and specialist tourism.

When developing tourism infrastructure, it is also necessary to ensure its safety (facilities and their immediate surroundings, application of monitoring systems, etc.). The implementation of this objective requires the cooperation of a number of entities with relevant bodies. This is a crucial element in improving tourists' safety.

Operational objective I.3. – Integration of products and tourist offers of the regions

This objective aims at achieving a number of crucial effects that are vital for increasing the attractiveness of the national tourist offer. These desirable effects include:

- improving and establishing cooperation between areas, service providers, and entities shaping the tourist offer,
- increasing the competitiveness of the Polish tourist offer in international markets,
- reducing unnecessary costs, especially related to the individual promotion of products and areas,
- creating a complementary offer, strengthened by its diversity,
- successively increasing the number of tourist products and their promotion in connection with existing strong products and brands,
- creating specially adjusted tourist products based on international cultural and sporting events that take place in Poland, such as the Chopin Year 2010 or the 2012 UEFA European Football Championship,
- developing assessment criteria for the integrated branded tourist products from the perspective of the pressure on the environment (e.g. efficient energy and resource consumption, including land consumption, scale of pressure on various environmental formations covered by various types of protection, scale of pollution or interference),
- defining rules that make reference to sustainable development, which are to be followed when establishing cooperation between various areas, and is a means of creating integrated products,
- establishing cooperation between environmental protection services while creating or developing integrated branded tourist products.

Operational objective I.4. – Development of entrepreneurship and of the activities of organisations in the field of tourism

The implementation of this objective relates to the activation of businesses and organisations that take part in shaping the tourist market, the cooperation with self-government authorities and the creation of joint undertakings, inter alia, in the form of public-private partnerships. The cooperation between public, social and economic partners affects the development of tourist products in the regions and the development of cooperation between authorities and economic operators. Such activities are

necessary both at the national and regional level. In this respect it is essential to develop rules of cooperation between partners, inter alia, through the preparation of model legal and organisation solutions, including planning activities.

It also needs to be remembered that the development of tourism businesses and tourist products should take into account the limitations resulting from the immediate proximity of legally protected areas, and that the development of tourism should be based on the values of those areas as early as at the products planning stages, on which the support for the development of those products is dependable.

Also important is the effectiveness and pro-environmental aspects of investments in the development of tourism infrastructure, as well as preferences for making use of existing buildings, for refurbishing or reconstructing the existing infrastructure, and activities minimising the appropriation of space for the infrastructure.

A particular emphasis is placed on supporting the development of innovative products that minimise the negative effect that the seasonal character of tourist traffic has on the environment. This will be achieved through the development of competitive tourist products for areas of environmental value and with particularly heavy tourist traffic.

Operational objective I.5. – Development of major types of tourism

The actions undertaken within this objective should result in the discovery of new, niche tourist products concerned with the distinctive competencies of the country and its regions in the field of tourism, as well as major phenomena that take place on the tourist market, including the needs of particular recipient groups, especially of the disabled, children and the elderly. Highlighting key types of tourism involves both recognising disregarded or forgotten areas of tourist activity, and indicating such tourist activities that have the greatest potential for development. The types of tourism indicated in the document are also linked to other socio-economic objectives of the development of the country, building the position of the tourism in a broader way.

When establishing key types of tourism, the five areas of Polish tourism brands with the greatest potential for fast growth have been taken into account. These were included in the *“Strategies for the development of the national tourist product of Poland”* of 1997. They are linked to the following activities to develop the major types of tourism listed below:

- business tourism: supporting the development of business and congress tourism,
- urban and cultural tourism: supporting the development of urban tourism, of high quality cultural tourism, of pilgrimage and ethnic tourism, supporting the development of tourism in post-industrial facilities,
- rural tourism: supporting the development of rural tourism, including agrotourism,

- recreation, active and specialist tourism: supporting the development of health resort, medical and rehabilitation tourism, supporting active tourism, including water and bicycle tourism,
- border and transit tourism: supporting the development of tourism in border regions, especially at EU borders.

Awareness of the need for sustainable development of individual types tourism should be the key assumption, and as such be a decisive factor as regards the scope of actions undertaken.

Priority area I: A HIGHLY COMPETITIVE TOURIST PRODUCT

<p>OPERATIONAL OBJECTIVE 1 Creating and developing competitive tourist products</p>	<p>ACTIVITIES</p> <ul style="list-style-type: none"> ■ Creating knowledge and information database in order to create new and develop existing competitive tourist products ■ Supporting the creation of new local and regional tourist products ■ Developing and implementing mechanisms and tools improving the quality of tourist products ■ Stimulating innovation in the process of creation marketing of tourist products ■ Developing a system for monitoring of tourist products and adjusting them to the market requirements ■ Improving tourists' safety
<p>OPERATIONAL OBJECTIVE 2 Developing tourism infrastructure</p>	<p>ACTIVITIES</p> <ul style="list-style-type: none"> ■ Developing tourist attractions infrastructure ■ Developing of specialist tourism infrastructure ■ Developing accommodation and catering infrastructure, inter alia, with a view to host the 2012 UEFA European Football Championship ■ Supporting the development of complementary infrastructure, important for raising the competitiveness of tourist products and extending tourist season ■ Supporting the development of proecological infrastructure ■ International cooperation in terms of tourism development, including the development of infrastructure ■ Creating a system of investment incentives
<p>OPERATIONAL OBJECTIVE 3 Integration of products and tourist offers of the regions</p>	<p>ACTIVITIES</p> <ul style="list-style-type: none"> ■ Creating and developing competitive tourist products ■ Establishing cooperation between various areas in order to create integrated tourist products
<p>OPERATIONAL OBJECTIVE 4 Development of entrepreneurship and of the activities of organisations in the field of tourism</p>	<p>ACTIVITIES</p> <ul style="list-style-type: none"> ■ Implementing regional and local consultancy programmes for tourist businesses ■ Improving the operating conditions for tourism businesses ■ Improving the access to the capital of tourism businesses ■ Supporting regional and sectoral tourism organisations
<p>OPERATIONAL OBJECTIVE 5 Development of major types of tourism</p>	<p>ACTIVITIES</p> <ul style="list-style-type: none"> ■ Supporting the development of Health resort, medical and rehabilitation tourism, and wellness tourism ■ Supporting the development of urban and cultural tourism, and tourism in industrial heritage facilities ■ Supporting the development of pilgrimage and ethnic tourism ■ Supporting the development of tourism in order regions ■ Supporting the development of rural tourism ■ Supporting the development of active and specialist tourism ■ Supporting the development of business and congress tourism

PRIORITY AREA II – DEVELOPMENT OF HUMAN RESOURCES CONTRIBUTING TO TOURISM DEVELOPMENT

Tourism, in accordance with assumptions presented in Part VI of this document, crosses the boundaries of economic activity in the traditional sense. When discussing the development of tourism, two generalized groups of human resources should be taken into consideration. They can be described as:

- creator of the tourist offer, and
- recipient of the tourist offer.

In the case of the first group, the biggest issue is developing the competence that will enable the creation of innovative and competitive tourist products and a proper customer service. Creators of the tourist offer must be able to meet the requirements of the market – using their resourcefulness and flexibility.

Professional skills and qualifications play a predominant role in achieving high quality of tourist services and implementing high quality tourist products. The quality of human resources determines the ability to quickly adapt to changing market requirements. In terms of tourism industry (employers), the main focus should be on promoting the idea of constant professional education and training of the human resources in order to meet the increasing needs of the customers.

As for the other group, it is important to develop appropriate attitudes and habits related to spending free time and creating demand for a valuable tourist offer which ensures physical and mental regeneration and broadens horizons.

Therefore, support of social personnel is essential for the development of tourism in general, as it contributes to the creation of appropriate attitudes among the consumers, promotes active approach to life through tourism and recreation and develops interest in cultural and environmental values of the country. Social personnel is particularly important for tourism and recreation for children and youth. This type of tourism creates a link between school and non-school education and has a great influence on the development of attitudes among young people. Moreover, it helps prevent social pathologies among children and youth.

Ecology is another important element which needs to be taken into account when developing human resources in tourism. It concerns those who create supply, as well as those who create demand for tourist services prepared in accordance with the rules for using the resources of the natural environment. Sustainable development is not a synonym of environmental protection – it should be understood in broader terms. This notion must encompass cultivation of the cultural heritage and preservation of local and regional traditions – at the same time, their incorporation into tourism should not lead to an excessive commercialisation. Well prepared tourist personnel raises the ecological awareness in consumers by proper promotion of the tourist offer, thus contributing to the quality of the product and the image of the company. Thus consumers are also involved in the development of tourism.

Both groups are responsible for the preservation of natural environment and cultural heritage as they constitute the basis of tourism offer.

Another important element in the development of personnel is preparing them in terms of disabled customer service.

Moreover, personnel should be properly prepared and coordinated to participate in huge cultural and sporting events, such as the 2012 UEFA European Football Championship, which will take place in Poland. This concerns both the professional personnel, as well as the volunteers who should be adequately trained to host a particular type of tourist – depending on the event they attend.

The Second Priority Area has the following strategic objective:

CS2. Preparation of qualified personnel for tourism

A SWOT analysis was carried out with regard to the impact that particular factors might have on the implementation of the strategic objectives. Those factors were classified in the following manner:

- strengths and weakness: internal factors affecting the competitiveness of the national tourism offer and their positive or negative impact on the implementation of the defined objectives,
- opportunities and threats: external (international) factors and the most important phenomena occurring outside tourism.

The most important factors are presented in the table below.

Strengths	Weaknesses
<p>S1. secondary schools, as well as establishments and entrepreneurs involved in educational activity, specialising in training personnel for tourism; development of higher education in this area,</p> <p>S2. increasing number of institutions involved in educational activities,</p> <p>S3. increased popularity of volunteerism,</p> <p>S4. increasing number of people and institutions involved in non-professional gathering of knowledge about the country, culture and environment,</p> <p>S5. academic personnel specialising in tourism,</p> <p>S6. increased popularity of trainings and education in the area of tourism among the youth</p>	<p>W1. insufficient skills in terms of customer service and poor knowledge of customers' expectations,</p> <p>W2. lack of an internationally recognizable certification system of professional skills,</p> <p>W3. insufficient knowledge of newest technologies useful in tourism sector,</p> <p>W4. insufficient command of foreign languages,</p> <p>W5. seasonal character of employment in tourism sector,</p> <p>W6. diversity of tourism labour market (among others: travel agencies, hotel industry, catering, transport, insurance, tourist amenities, recreation),</p> <p>W7. insufficient cooperation of tourism industry with educational establishments in terms of practical vocational training,</p> <p>W8. low level of ecological awareness and knowledge of environmental values among the personnel</p>

Opportunities	Threats
<p>O1. growing interest in improving qualifications, particularly among young people,</p> <p>O2. easier access to knowledge and studies abroad,</p> <p>O3. high interest in entrepreneurship which can be possibly used in tourism,</p> <p>O4. considerable popularity of tourism as a way of spending leisure time,</p>	<p>T1. professional personnel migrating abroad,</p> <p>T2. dynamic changes in customers' expectations and, as a result, problems with ensuring adequate qualifications,</p> <p>T3. limited means for developing attitudes among children and youth,</p> <p>T4. gaps in the existing legislation enabling increased activity in the grey zone and hindering a thorough research of the processes taking place in tourism,</p>

Operational objective II.1. – Preparation of the operational personnel in tourism economy

Activities leading to the implementation of this objective will be directly aimed at three basic groups of recipients:

- people currently employed in the tourism industry,
- people who can possibly find employment in tourism industry,
- people who already run or want to start business activity in tourism industry.

Among all the people employed in tourism industry, it is important to distinguish – due to different qualifications required – between employees who are directly involved in dealing with tourist traffic and the managers.

The implementation of the Operational Objective involves the improvement of skills of the management in tourist industry, as well as raising the qualifications of employees responsible for customer service. All employees of tourism industry will be covered by the undertaken measures, although representatives of travel agencies, hotels and restaurants, as well as tour guides, are considered to be the most important link. Implementation of the objective is predicted to raise the quality of rendered services. The preparation of qualified tourism personnel and their training should focus, among others, on using theoretical knowledge in practice; moreover, the educational process itself should, as much as possible, resemble the target working conditions. Therefore, entities from tourism industry should participate in the process of increasing the qualifications.

Furthermore, tourism, which as a part of the services sector is characterized by considerable labour intensity, may be a chance for the unemployed, people interested in professional reorientation and graduates who, having received a properly designed vocational education, will be ready to start working in tourism industry. The implementation of this objective involves also the preparation of new operational personnel for tourism

industry and monitoring of the education process in order to adjust it to market requirements.

Certain part of tourist functions may be carried out with a relatively low investment of capital. Therefore, tourism may be an interesting alternative for people willing to start their own business activity. Nevertheless, adequate preparation, acquiring appropriate skills and creativity in spotting new opportunities on the market are essential.

It will be important to ensure that the trainings and internships for new personnel which will service the tourist traffic, as well as for employees and managers already employed in this sector, encompass issues related to dealing with special groups of tourists, in particular the disabled, as well as issues regarding environmental protection and ecology in general approach – the personnel needs be aware of the restrictions imposed by the constitutional obligation of environmental protection, terms of this protection (legal, institutional, practical), sources of information on the current condition of the environment and benefits for tourism industry resulting from preservation of the natural environment in a proper condition.

Operational Objective II.2. – Development of tourism education and social tourism

The impact of tourism stretches well beyond the market, as it affects people's attitudes, quality of social and human capital and the natural environment, tourism should be treated as an important element of education, ecology, health and culture.

The responsibility for ensuring the proper direction of the development process in tourism lies with the entities creating the tourism offer, as well as with tourists themselves. Rational utilisation of environmental and cultural resources, showing respect to local tradition, offering leisure time activities which are aimed at physical and intellectual development, and, at the same time, ensuring that the customers will be interested in a more ambitious offer – these are the premises behind this objective.

The realisation of this objective will require convincing Poles to experience our national offer – this includes raising their awareness of how attractive this offer is and of the impact they have on the local labour markets and economic situation in our country when choosing a place for spending their leisure time.

Moreover, this objective involves the implementation of measures aimed at encouraging tourist activity among the disabled persons, which will be undertaken by both sides, organizers and recipients.

Tourism and recreation of children and youth is an important stage in the process of upbringing for tourism which will shape the future recipients of tourist services.

Operational Objective II.3. – Monitoring the needs of tourism industry in terms of human resources

Workplaces available on the tourism-related labour market vary in terms of necessary qualifications. Many of the professions require high qualifications and quick adaptation to the changing market conditions. In order to ensure that the entire personnel, including

the management, will always have an appropriate level of knowledge and skills, continual investment in the development of the personnel will be necessary. Increased competition between particular areas of tourism industry imposes actions targeted at maximising the efficiency of the business activity. Developing an information base (regarding supply and demand) for the travel agencies, hotels, tourism and catering markets will contribute to the creation of a human resources base for the companies operating on the tourism markets which will have adequate skills to act efficiently in the context of changing demand for tourist services.

Priority area II: DEVELOPMENT OF HUMAN RESOURCES CONTRIBUTING TO TOURISM DEVELOPMENT

OPERATIONAL OBJECTIVE 1	OPERATIONAL OBJECTIVE 2	OPERATIONAL OBJECTIVE 3
<p>Preparation of operational personnel in the tourism industry</p> <p>MEASURES</p> <ul style="list-style-type: none"> ■ Preparation of new personnel for servicing tourist traffic during, among others, European UEFA Football Championship EURO 2012 ■ Raising the qualifications of the management ■ Raising the qualifications of the operational personnel in tourism ■ Improving the qualifications of the education personnel: teachers, lecturers, trainers ■ Ensuring easy access to professional consultancy, research and training services 	<p>Development of tourism education and social tourism</p> <p>MEASURES</p> <ul style="list-style-type: none"> ■ Development, implementation and popularisation of tourist education programmes (in particular for children, youth and the disabled) ■ Support for governmental and self-governmental bodies ■ Training for representatives of Regional and Local Tourist Organisations ■ Support for non-governmental organisations (the social personnel of tourism) involved in tourism ■ Support for the activities of social personnel in tourism ■ Support for NGOs involved in tourism 	<p>Monitoring the needs of the tourism sector in terms of human resources</p> <p>MEASURES</p> <ul style="list-style-type: none"> ■ Development of a system monitoring changes in terms of personnel requirements in tourism ■ Development of a national Centre for Training and Vocational Proficiency of Tourist Personnel, as well as regional Centres for Training and Vocational Proficiency of Tourist Personnel

PRIORITY AREA III – MARKETING SUPPORT

Developing a tourism marketing system in Poland is aimed at reinforcing promotional activities and therefore increasing the incoming tourist traffic and supporting domestic tourism.

It is particularly important in the light of significant cultural and sporting events which Poland will organise, including the European Football Championship in 2012. This significance should translate into the intensification of promotional campaigns, preparation of special thematic publications, organization of targeted study visits, active participation in tourism fairs and cooperation with organizers of tourist events, so as to ensure that the new tourist products related to significant cultural and sporting events taking place in Poland find their way into foreign travel agencies' catalogues.

The marketing of tourist products within the assumed strategy should be implemented in several stages which will focus on the following messages:

- stage I: exposing the most important tourist attractions, drawing attention – not only among the recipients, but also among current and potential creators of tourist offer – to numerous advantages constituting a solid base for interesting leisure time activities;
- stage II: adjusting tourist products to the requirements of selected recipient groups, expanding the products by adding further attractions - less spectacular, but nonetheless interesting for specific recipients;
- stage III: reinforcing the high-quality image of national tourist products.

The notion of quality requires a broader interpretation. The message should be adjusted in such a way that it convinces the recipients that the tourist offer fulfils the following criteria:

- certainty of choice – the presented offer is reliable and clear and does not incorporate information that is not true,
- individual approach – the initial offer can be adjusted, to a certain extent, to the expectations of a particular customer: extended by additional elements or reduced, so as to meet the customer's financial expectations; in this regard, quality can also be present in a relatively inexpensive offer, affordable for most recipients;
- security – a tourist offer does not involve hazardous elements, tourists are not exposed to dangers related with criminal activity or accidents.

Moreover, the components of a tourist offer should send the message that it respects local cultural and environmental values and social traditions.

In order to cooperate efficiently in the process of creating a competitive product, it is essential to develop a partnership approach. Relying on legal, technical and operational solutions very often proves insufficient. We must create awareness and need for cooperation in the process of creation and commercialisation of products, even if it sometimes involves the cooperation of competing regions. It also should be noted that there is a strong relationship between the processes of commercialisation and creation of a tourist product and the processes of developing 'the Polish brand' and national

branding. Therefore building 'the Polish brand' will involve reinforcing the market identity of products so as to make them recognizable as Polish products, which is essential in building a successful national branding.

The entity supervising the activities under this priority area is the Polish Tourist Organization which, along with regional and local tourist organizations, as well as local self-governments, undertakes activities as part of the international and national tourism marketing.

As the results of a promotion are frequently visible only after several years of activities, strategic planning of area marketing is particularly important. Regional promotion plans should therefore be developed for several years in advance and be based on the tourism development strategy for a particular region. Promotion activities should be continuous (cyclical) and planned for a longer period. What it means in practical terms, is that promotion activities, or their substantive content, should not be developed as a one-time event, but as a long-term promotional strategy.

With the above mentioned in mind, the Polish Tourist Organization will prepare a marketing strategy for the tourism sector in Poland for the years 2008–2015.

The Third Priority Area has the following strategic objective:

CS3. Creation and development of a marketing system in tourism

A consistent and efficient tourism marketing system, utilising an integrated national tourist information system, is meant to develop a positive tourist image of Poland, stimulating the growth of its tourist products and increasing the number of foreign and national tourists.

Assumptions regarding the marketing support for this area are compatible with the 'Assumptions regarding the *Strategy for the promotion of Polish economy 2007–2015*', whose priorities include an increase of incoming tourist traffic in Poland through, among others, promotion of Polish tourist products and development of a tourist information system.

A SWOT analysis was carried out with regard to the impact that particular factors might have on the implementation of the strategic objectives. Those factors were classified in the following manner;

- strengths and weakness: internal factors affecting the competitiveness of the national tourism offer and their positive or negative impact on the implementation of the intended objectives,
- opportunities and threats: external (international) factors and the most important phenomena occurring outside tourism.

Strengths	Weaknesses
<p>S1. growing interest among self-governments in developing local and regional tourist brands,</p> <p>S2. tourist products and services with a high marketing potential,</p> <p>S3. towns and areas enjoying a positive image,</p>	<p>W1. lack of a complex tourist information and reservation system, limited access to the Internet,</p> <p>W2. lack of a tourist image of Poland and its regions,</p> <p>W3. insufficient experience of entities developing the tourist offer in terms of marketing cooperation,</p> <p>W4. insufficient funds for implementation of modern technological solutions or the creation of regional and national information networks,</p> <p>W5. insufficient number of spectacular events reinforcing the image of our country or particular regions and increasing the interest in our tourist offer,</p>
Opportunities	Threats
<p>O1. development of modern technologies enabling us to overcome obstacles in the exchange of information ,</p> <p>O2. growing popularity of new tourist attractions/ areas,</p>	<p>T1. increased marketing activity of competing tourist reception areas in the world,</p> <p>T2. increased activity in terms of promotion of products and services used as substitutes to tourism (including shopping malls),</p>

Operational objective III.1. – Improvement of tourist information system

Commercialisation of tourist products requires a dynamic development of the existing tourist information systems and modern information services, connected with international systems and adjusted to changing requirements on the market, such as, among others, being awarded the right to organise the final match of the European Football Championship UEFA EURO 2012.

The realisation of the objective is expected to have the following results:

- merging of the tourist information located in a number of sources into an integrated system which will be updated on a constant basis by data provided by market entities, institutions involved in tourism, local self-governments, etc.;
- technical improvement of the availability of the tourist information system from a number locations and through various communication channels;
- better adjustment of the information and the ways of communication to the expectations of particular recipient groups, in particular the disabled.

Operational Objective III.2. – Increasing the effectiveness of marketing activities in tourism

Lack of a clear and positive image of Poland as a country attractive to tourists means that there is an urgent need to implement promotional programmes in the years 2008–2015, which will address the current trends in tourism and the specific nature of target markets. The realisation of this objective should lead to elimination of factors highly inconvenient for the development of tourism, such as:

- lack of a diversified and complex offer combining tourist attractions and services provided by various entities and in different areas of the country,
- a relatively low (on an international level) competitiveness of the national offer, resulting, above all, from the lack of an adequate image,
- deep-rooted negative stereotypes, not necessarily connected to tourism (e.g. safety, hygiene, etc.) which have a negative impact on the national tourist offer.

The development of marketing should be characterized by vertical and horizontal integration of the activities and be carried out mainly by the Polish Tourist Organisation as well as regional and local tourist organizations.



PRIORITY AREA IV – SHAPING THE TOURIST SPACE

Tourist space is one of the basic indicators of the tourist attractiveness and, at the same time, it is an asset endangered by the development of tourism industry. The priority is to shape the space so as to, on the one hand, raise its tourist attractiveness, and on the other protect it from the intensified activities related to tourism industry. The development of tourism economy on a national or regional level has a very considerable impact on the natural, social and cultural environment; therefore, changes in the environment caused by tourism should be monitored.

There is a feedback between tourism and tourist space. Each space is characterised by a certain capacity which is determined by the number of participants and the scope and nature of social and economic functions offered. A certain deal of preparations must be undertaken in order to host additional persons in a given area without disturbing the living conditions of its permanent residents. Regardless of the type of tourist functions offered, space is the basic factor determining the attractiveness of a given location. Sustaining tourist attractiveness is therefore dependant on the preservation of a widely understood spatial order in the following dimensions:

- economic, i.e. by preventing interference between tourism and other areas of the economy,
- social, i.e. local communities accepting their role as a host for tourist traffic,
- ecological, i.e. ensuring that tourist traffic does not exceed environmental capacity of a given location,
- urban and architectural, i.e. creating an attractive land development and not distorting this order by new tourist amenities,
- aesthetic, encompassing the protection of the space against vandalism or pollution,
- health, particularly in terms of environmental health, by ensuring order and harmony in the tourist space which are based on natural elements of the landscape, etc.

Development of tourism is usually associated with an increased transport accessibility due to construction and modernisation or redevelopment of transport infrastructure, i.e. roads, railway networks, water ducts and airports.

Realisation of activities defined in this priority area is directly related to the scope of undertakings in other sectors – therefore it is necessary to include the requirements of tourism industry in complementary strategic documents.

The Fourth Priority Area has the following strategic objective:

CS4. Shaping the areas of high tourist attractiveness

A SWOT analysis was carried out with regard to particular factors affecting the realisation of defined strategic objectives. Those factors were classified in the following manner;

- strengths and weaknesses: internal factors affecting the competitiveness of the national tourist offer and their positive or negative impact on the implementation of the defined objectives
- opportunities and threats: external (international) factors and the most important phenomena occurring outside tourism

Strengths	Weaknesses
S1. economic growth and, in consequence, growing investment opportunities, S2. actions undertaken by self-governments, aimed at improving aesthetics of towns in their historic and central parts,	W1. poor aesthetics and no order in tourist space, which has a negative impact on attractiveness of the tourist offer, W2. geographical location (eastern Europe), away from main tourist routes, which decreases the attractiveness of the national tourist offer, W3. poor communication accessibility of attractive areas, W4. insufficient technical infrastructure, which lowers the potential absorption of tourist traffic, W5. chaotic land development and lack of effective instruments for the development of spatial order,

Opportunities	Threats
<p>O1. accepting the rules of sustainable growth as an unquestionable criterion in the socio-economic development in Poland,</p> <p>O2. realisation of European programmes for development of transport networks,</p> <p>O3. dynamic development of air traffic and increased importance of direct air connections and decreasing commute time,</p> <p>O4. availability of EU measures for activities aimed at revitalising, restoring or sustaining the values of the natural environment and post-industrial or post-military areas,</p> <p>O5. possible complementarity of tourism and restructuring and revitalisation programmes implemented in rural and urban areas, with large availability of resources.</p>	<p>T1. degradation of natural resources caused by civilizational development,</p> <p>T2. increased importance of transport accessibility, often deciding about the choice of tourist destination,</p> <p>T3. uncontrolled 'privatisation' of space and hindered public access to places attractive in term of tourism and recreation.</p>

Operational Objective IV.1. – Shaping the development of tourism so as to preserve and increase the value of tourist space

Investment and organisational activities aimed at the development of tourism should be adjusted to the natural environment and preserve regional and local natural values in an appropriate condition.

On the local level, tourist space must be shaped on the basis of detailed analyses of tourist potential and in a close relation to ecological capacity of target areas. Analyses of the ecological capacity must be carried out on a local level and in relation to local conditions. The following should be regarded as fundamental rules for the utilisation of tourist space:

- in the case of particularly valuable areas (including buffer zones), in particular national parks, nature reserves and some of the areas constituting the NATURA 2000 network, tourism should be dependent on environmental and biodiversity protection,
- in the case of landscape parks, tourism should be treated equally with nature and landscape protection, often by finding a compromise between the needs for development and preserving the nature,
- in the case of other areas, in particular protected landscape areas, tourism should develop on the most flexible terms.

All activities carried out during the process of shaping the tourist space should be considered in terms of potential threats for the environment and local communities living in that area. Environmental criteria should be taken into account when deciding about

the designation of new land for investment and about the nature of land development, in particular if they are related to tourist trails and located in an area particularly penetrated by tourist traffic, which increases in places where tourist infrastructure is developed. During realisation of this objective, support will be granted to tourism-related projects carried out in accordance with Agenda 21.

Operational Objective IV.2. – Increasing the tourist accessibility of regions through the development of transport

Construction, modernisation and redevelopment of transport infrastructure should lead to an increased accessibility of the most important tourist areas and products of a given region. Transport accessibility of tourist areas is a key element in the process of improving the competitiveness of Polish tourist offer, particularly in the context of Poland and Ukraine organising the European Football Championship 2012. Therefore, the development of the basic means of communication – road, railway and airways – should include access to tourist attractions.

The process of increasing the accessibility of regions and products attractive to tourists must be adjusted to ecological capacity of the environment and should be conducted in accordance with requirements for the protection of natural values of areas in which the transport infrastructure, roads in particular, is being planned. Pro-ecological transport connections should be promoted so that the growth of natural value of an area is accompanied by a growing participation of tourists using pro-ecological solutions in transport. Therefore, the development of various forms of collective transport should be promoted – both in relation to the areas attractive to tourists as well as their vicinity; this includes rail transport, but also other means of collective transport, as well as enabling bicycle and pedestrian traffic in tourist areas.

Increasing the accessibility should also be aimed at the improvement of quality and provide an equal access to tourist attractions to all target groups, including the disabled. This relates particularly to integrated collective transport which, in the context of tourism, is mainly characterized by its availability.

The development of communication routes, in the light of ever-growing tourist traffic, requires special attention in terms of its security (communication routes, railway stations, airports, ports, harbours, etc.). This is a crucial element in raising the safety of tourists.

Priority area IV: SHAPING THE TOURIST SPACE

OPERATIONAL OBJECTIVE 1 Ensuring that development of tourism is sustainable and raises the quality of a given area	OPERATIONAL OBJECTIVE 2 Increasing the transport accessibility of particular regions by development of transport
<p data-bbox="365 532 466 554">MEASURES</p> <ul data-bbox="181 580 651 814" style="list-style-type: none">■ Implementing innovations in infrastructure for a sustainable growth of tourism■ Implementing model solutions in terms of pro-ecological tourist infrastructure in protected areas and buffer zones■ Support for pro-tourism initiatives exceeding the local boundaries■ Developing legal basis and rules for determining 'tourist-service areas'■ Utilisation of areas and amenities of a potential importance to tourism	<p data-bbox="868 532 968 554">MEASURES</p> <ul data-bbox="683 580 1154 864" style="list-style-type: none">■ Cooperation in the expansion of regional and local air transport infrastructure in accordance with the needs of tourist traffic■ Considering the needs of regional tourist markets during the modernisation and expansion of transport infrastructure■ Supporting the sustainable development of transport systems in towns and areas with the most intensive tourist traffic■ Supporting the development and modernisation of passenger ports for inland and ocean sailing, with consideration to tourist traffic

**STUDIES
IN THE FIELD OF
TOURISM ECONOMY**

IV

IV. STUDIES IN THE FIELD OF TOURISM ECONOMY

Development of studies which support taking decisions contributing to tourism development is one of the most important conditions for the efficient implementation of *Directions...*

In the light of other EU countries' experiences and the increased activity of Poland in the field of statistical research, it is necessary to improve methodology of regional data collection as well as their quality and availability. This is needed to ensure a basis for data base preparation and supplementation both for the regional tourism satellite account and for the preparation of various programmes, strategies, activities planning in terms of management and regions promotion.

The collected data will indicate to local authorities and investors the need for product evolution in order to avoid too strong exploitation of its resources and/or its premature ageing. Applying complex prognostic services will enable the implementation of rules of sustainable development in tourism economy.

Furthermore, it is necessary to develop new methods of dealing with tourist traffic, marketing and management, which require access to accurate data. Properly designed research model, including research related to environment issues, and access to the prepared results allows for increasing the sale of services, reduces potential losses and, as a result, creates market advantage over the competition.

These studies will enable the defining of needs of target recipients group and allow for designing the trainings syllabus. On one hand, they will result from the conscious needs of employees, on the other, they will be based on employers' opinions.

The list of research activities complementing the actions proposed under the priority areas is presented below.

Carrying out statistical research

The basic aim of statistical research improvement will be a better reflection of current tourism economy state and more comprehensive fulfilment of the recipients' needs.

Statistical research related to tourism will provide a source of data for completing Eurostat standard tables. Furthermore, they will constitute a basis for carrying out international comparisons using the same research methods as well as a source of information for the preparation of the balance of payments.

In relation to the draft amendments to Council Directive 95/57/EC and to Act on tourist services it will be necessary to regularly adjust the conducted statistical research regarding tourism to the new legal regulations.

This research should be carried out first and foremost in the key reception areas of the tourist services market. The collected data will constitute a strategic set of information about the market and the development tendencies related to the supply and demand parties in tourism. In relation to Poland's accession to the Schengen area, it became necessary to implement new methodology of research on foreign ingoing and outgoing tourism.

Actions will be carried out, consisting in the improvement of instruments (based on modern technologies) for monitoring tourism market and its influence on the national economy. Furthermore, necessary works will be undertaken in order to expand the

scope of subject research regarding accommodation facilities, taking into account the possibility of preparing and updating the registry of entities providing accommodation services which are not included in the currently conducted studies. It is also assumed that actions should be taken in order to apply electronic information carrier, with particular consideration paid to the Internet. These actions will include both channels of gathering information and presenting research results.

Works related to improving the methodology of preparing tourism satellite account for Poland will be continued. Works on the methodology and improvement of preparing regional tourism satellite account will be carried out as well.

An obligatory registry of entities operating in the tourism sector in an electronic format according to the unified models and standards is to be introduced. Simultaneously, in order to facilitate the application of the results of public statistics research, it is planned that classifications and standards applied by the public statistics services will be used to a greater extent in research methodologies.

Preparation of the integrated programme for regional research of tourism economy

The activity implementation will be carried out by means of economic and social phenomena research on the tourism market with the aim to improve marketing efficiency of tourism sector and self-governments. There will be carried out necessary assessments of qualitative changes in the perception of tourist products and resources (including human resources), which are the base for these products. The undertaken tasks will include also those related to various research areas, i.e. product research, price research, tourist services distribution, research of tourist services quality, etc.

Among these research types, the research on Poland's image in the world – using, inter alia, foreign centres of Polish Tourist Organisation – will be of special importance.

The programme and methodology of market research in Poland will be compatible with international market research carried out by international tourism organisations, thus making it possible to carry out comparative analyses, especially in relation to priority markets and main competitors of Poland.

Furthermore, the research will include particular types of tourism (business, rural, etc.) and tourist companies (in particular their economic and financial situation). Tourism market research will be complemented also by studies conducted in the tourist attractions areas (museums, national and natural landscape parks, etc.).

These studies will cover issues of tourists' safety, especially perception of its level in particular tourist destinations. They will include places characterised by increased tourist traffic and will be carried out both among national and foreign tourists. They will also provide a basis for undertaking effective prevention actions.

This activity assumes also supporting the development of research units, which carry out the tourist regions research on the basis of a unified national methodology.

Development of research methods on regional, national and international level

Studies will be carried out throughout Poland according to the common methodological assumptions. Information and analyses will be made available by means of information services, which should enable forecasting phenomena and taking decisions on the need of tourist products and marketing strategies modifications at an adequately earlier time.

As a result, it will be possible to strengthen the product or modify existing solutions. Motives for particular clients' travel to the visited place will be determined on the basis of market analyses. Gathered knowledge will indicate the product development stage and enable taking necessary actions in advance.

Marketing research

The strategy of general promotion studies consists of the following elements: analysis of local perception of Poland with particular attention paid to issues contributing to negative opinions; research of public opinion and other secondary data related to the views on Poland prevailing in the environment that is the target of particular activities; key messages and subjects related to the identified and recognised attitudes; characterisation of the environment targeted by promotion activities (addressees of all the promotion activities need to be precisely specified; in this respect research and polls of public opinion or selected target group are very useful). These research results will make it possible, for example, to develop information strategy, assess efficiency of actions conducted so far and correct promotion plans.

In order to monitor changing preferences and needs of tourist services customers, marketing research for the development of tourist services will be carried out under this activity.

Collection of primary regional data from the consumers' market for particular products groups will allow to specify the needs of introducing necessary changes in order to maintain tourist attractiveness of target areas. Involvement of tourist organisations, such as regional tourist organisations (ROTs) and local tourist organisations (LOTs), in research process will increase the topicality and quality of collected data.

Under this activity, works will be carried out to adjust the marketing research methods to a specific situation on tourist services market and to improve them.

Market research and analyses prepared, inter alia, by United Nations World Travel Organisation (UNWTO), European Travel Commission (ETC) and Pacific Asia Travel Association (PATA) play an important role in shaping the marketing strategy in Poland's tourism.

Through its foreign centres, Polish Tourist Organisation will carry out research on consumers in the markets it is active in. Such research will aim to study the image of Poland as a tourist country and specify preferences, motivations and expectations of foreign tourist.

Labour market research

The activity includes conducting the studies:

- related to the training of new personnel for tourist traffic service; constant labour market research on the number of vacant workplaces in tourism economy and qualifications of the sought-after employees are a necessary element for the realisation of this activity. Research results will be used for an effective training of employees in the specialisations/occupations sought after by the employers. Training for particular employers' needs increases the chances for employment in the sector, ensures high effectiveness and motivates both lecturers and trainees in a very positive manner;

- related to raising qualifications of management staff in tourism sector. The research should include changes in consumption models, tendencies in world and European tourism, customers' preferences as well as the degree of customers' satisfaction with the provided tourist services, divided into particular sections;
- related to raising qualifications of operating personnel in tourism economy.

The trainings programming will be conducted with the use of research results specifying the needs of target recipients groups.

Monitoring of education efficiency

Monitoring of tourist, hotel trade and catering schools will make it possible to specify the situation, including, indirectly, the needs and preferences of labour market in tourism economy. At the same time it will show the number of personnel ready to take on jobs. It will also allow in the future to better adjust the education offer to the demands of labour market in tourism sector.

The measures under this activity should include:

- monitoring of education market, specifying the diversity of offers directed to students choosing upper secondary schools that educate personnel for tourism, as well as changes taking place in Polish and world education market;
- detailed characteristics of current educational system, divided into forms and stages of personnel occupational education and training;
- assessment of the availability of offers (e.g. costs of education in private schools).

Tourism integration with needs and requirements of the natural environment

- supporting the research and study units that deal with the correlations between tourism development and the needs and requirements of natural environment protection, and especially conduct works related to:
- methods of assessment and accounting for the tourist capacity, ecosystems tourist capacity as well as the environmental infrastructure capacity in the case of tourist infrastructure construction or development;
- preparation and implementation of pro-environment technologies and introduction of efficiency indicators in tourism;
- within the framework of tourism activity, searching for methods of support for multifunctional development of rural areas, including forestry economy.

Monitoring of promotional activities efficiency

Activities implementation will take place through the preparation and implementation of studies, which will be used for assessment of promoting activities efficiency as a basic tool for their evaluation.

**MONITORING AND
EVALUATION SYSTEM**



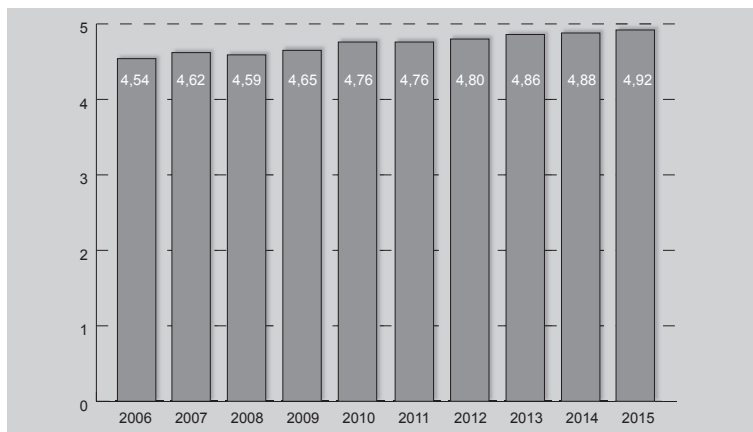
V. MONITORING AND EVALUATION SYSTEM

The realisation of objectives provided for in *Directions...*, along with their becoming part of the realisation of the Polish Government's objectives, will be possible after reaching the level of selected macroeconomic indicators.

These indicators will include mainly:

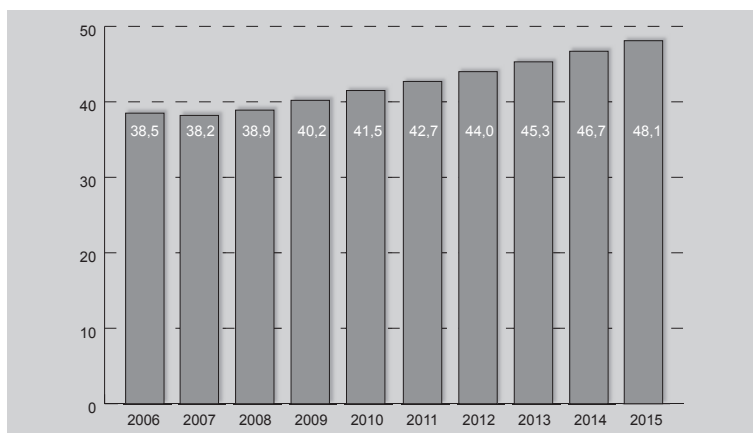
- 1) the tourism economy contribution to creating GDP,

Fig. 6. The tourism economy contribution to creating GDP (in %, * without the State's expenditure for tourism and business trips)*



- 2) the participation of Poles in tourist trips,

Fig. 7. Number of domestic tourist trips of Polish citizens (million)*

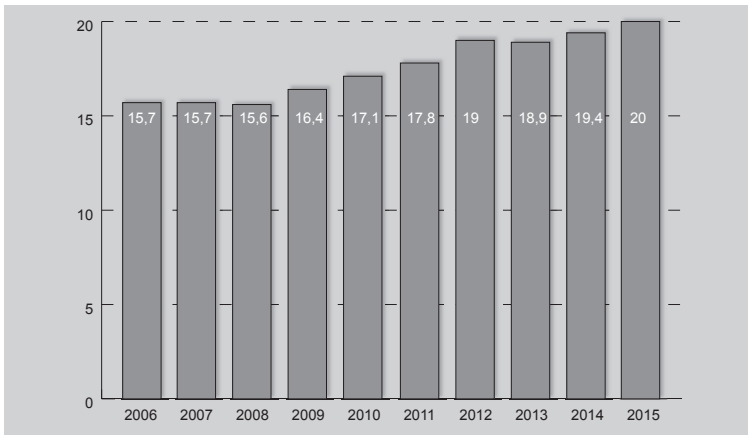


* Source: Studies and prognoses of the Tourism Institute and CSO (GUS), in particular:

- "Foreign tourism", symbol in the Government's Statistical Survey Programme of Official Statistics: 1.30.05
- "Tourist activity of Poles", symbol in the Statistical Survey Programme: 1.30.06.

3) increase in the number of foreign tourists and visitors.

Fig. 8. Number of foreign tourists coming to Poland (million)*



On the other hand, the detailed indicators and expected results in 2008–2015, which should be achieved by way of realisation of the assumptions for Directions..., have been presented in the table below:

No	Indicators	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
1.	Tourism economy contribution to creating GDP (in %)**	4.54	4.62	4.59	4.65	4.76	4.76	4.80	4.86	4.88	4.92
2.	Participation of Polish citizens in tourist travels (in %)	47	47	51	53	55	57	57	60	60	61
2 a	In short-term trips (1-3 nights) (in %)	27	26	25	25	26	27	27	28	28	29
2 b	In holiday and vacation trips (5-day-long at minimum) (in %)	33.5	33	33	34	36	38	38	39	39	40
3.	Number of domestic tourist trips of Polish citizens (million)	38.5	34.9	38.9	40.2	41.5	42.7	44.0	45.3	46.7	48.1
4.	Number of foreigners coming to Poland (million)	65.1	66.2	69.5	71.2	72.8	74.2	75.6	77.1	78.0	79.1
5.	Number of foreign tourists coming to Poland (million)	15.7	15.0	15.6	16.4	17.1	17.8	19.0	18.9	19.4	20.0
6.	Estimated expenditure of foreigners in Poland (million USD)	7.1	9.0	9.1	9.6	10.1	10.5	11.0	10.7	11.2	11.9
7.	Estimated expenditure of foreign tourists in Poland (in million USD)	3.4	4.0	4.0	4.3	4.6	4.9	5.4	5.0	5.3	5.7

* Source: Studies and prognoses of the Tourism Institute and CSO (GUS), in particular: "Foreign tourism", symbol in the Government's Statistical Survey Programme of Official Statistics: 1.30.05

** without the State's expenditure for tourism and business trips

No	Indicators	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
8.	Estimated expenditure of Polish citizens on domestic tourist trips (million PLN)	18.9	20.1	21.3	22.6	24.0	25.5	27.1	28.8	30.6	32.5

Source: Studies and prognoses of the Tourism Institute and CSO (GUS), in particular:

- “Foreign tourism”, symbol in the Government’s Statistical Survey Programme of Official Statistics: 1.30.05
- “Tourist activity of Poles”, symbol in the Statistical Survey Programme: 1.30.06.

The maintenance of indicators presented in the table above at the level of prognoses provided in *Directions...* is a basic criterion for assessing the realisation of the objectives.

Furthermore, it is planned that in order to monitor the effects of the tasks implemented by the Interministerial Team, the President of the Interministerial Team (Minister Competent for Tourism) will prepare an annual report of the Team’s operations and then submit it to the Council of Ministers.

The Minister Competent for Tourism will also prepare the following reports on the condition of tourism economy:

- in 2012 on the condition of tourism economy in 2007–2011
- in 2016 on the condition of economy in 2012–2015.

An important assumption is that *Directions...* will be dynamically modified and adjusted to changing conditions. It means that the presented document will be treated as an opening of the strategic process and entering the path of systemic management of the tourism development in the long run.

**SOURCES OF
DIRECTIONS...
FINANCING AND TASKS
CONTRACTORS**



VI. SOURCES OF DIRECTIONS... FINANCING AND TASKS CONTRACTORS

Financing of the *Strategy*..., as its implementation, will involve two levels:

1. Financing of tasks recommended by the ***Interministerial Team for coordinating the tasks of the Government included in Directions for Tourism Development until 2015***, which is going to be appointed by the Ruling of the President of the Council of Ministers (Level I).
2. Financing of tasks recommended to all entities acting for tourism development (Level II).

1. Financing of tasks recommended by the Interministerial Team for coordinating the tasks of the Government included in *Directions for Tourism Development until 2015*, which is going to be appointed by the Ruling of the President of the Council of Ministers (Level I).

It is envisaged that the tasks recommended by the Interministerial Team for coordinating the tasks of the Government included in *Directions for Tourism Development until 2015* will be financed in 2008 from the resources allocated under the Budget Act to the Minister Competent for Tourism.

It is planned that as of 2009 the tasks concerning the implementation of *Directions*... as well as financial expenditure will be recommended annually to competent ministers by the Interministerial Team. The tasks will be financed by the Minister Competent for Tourism and other Ministers within the resources provided for in the Budget Act for a given year.

In the Budget Act for 2008 of 23 January 2008 (Dz. U. No 19, item 117) the amount of PLN 49,066,000 was allocated for part 40 of the State Budget – “Tourism”.

The Office servicing the Minister of Tourism will provide service for the Team.

Task	Implementing entities	Implementation period	Sources of financing
1. Initiating, assessing and making recommendations regarding proposals for legislative solutions in respect of legislative regulations affecting the development of tourism	Minister Competent for Tourism and Ministers who are members of the Interministerial Team according to their competence	2008	Part 40 of the State Budget – “Tourism”
2. Initiating, assessing and making recommendations regarding lines of actions aimed at strengthening the competitiveness of Polish tourist product	Minister Competent for Tourism and Ministers who are members of the Interministerial Team as appropriate	2008–2010	Part 40 of the State Budget – “Tourism” and funds allocated under the Budget Act to particular administrators, who are members of the Interministerial Team, which is going to be appointed by the Ruling of the President of the Council of Ministers

Task	Implementing entities	Implementation period	Sources of financing
3. Initiating, assessing and making recommendations regarding actions for enhancing cooperation in the field of tourism promotion in Poland and shaping its image as a country attractive in terms of tourism	Minister Competent for Tourism and Ministers who are members of the Interministerial Team as appropriate	2008–2015	Part 40 of the State Budget – “Tourism” and funds allocated under the Budget Act to particular administrators, who are members of the Interministerial Team, which is going to be appointed by the Ruling of the President of the Council of Ministers
4. Initiating, assessing and making recommendations regarding lines of actions for tourism investments promotion	Minister Competent for Tourism and Ministers who are members of the Interministerial Team as appropriate	2009–2010	Part 40 of the State Budget – “Tourism” and funds allocated under the Budget Act to particular administrators, who are members of the Interministerial Team, which is going to be appointed by the Ruling of the President of the Council of Ministers
5. Initiating, assessing and making recommendations regarding plans for changes in respect of tourism education standards to ensure market needs are met	Minister Competent for Tourism and Ministers who are members of the Interministerial Team as appropriate	2010–2015	Part 40 of the State Budget – “Tourism” and funds allocated under the Budget Act to particular administrators, who are members of the Interministerial Team, which is going to be appointed by the Ruling of the President of the Council of Ministers
6. Initiating, assessing and making recommendations regarding schemes of actions for increasing the participation of citizens of Poland in national tourism, especially for increasing the accessibility of services for children and youth, the disabled, the elderly and families	Minister Competent for Tourism and Ministers who are members of the Interministerial Team as appropriate	2008–2010	Part 40 of the State Budget – “Tourism” and funds allocated under the Budget Act to particular administrators, who are members of the Interministerial Team, which is going to be appointed by the Ruling of the President of the Council of Ministers
7. Initiating, assessing and making recommendations regarding lines of changes related to transport accessibility of places attractive to tourists	Minister Competent for Tourism and Ministers who are members of the Interministerial Team as appropriate	2009–2011	Part 40 of the State Budget – “Tourism” and funds allocated under the Budget Act to particular administrators, who are members of the Interministerial Team, which is going to be appointed by the Ruling of the President of the Council of Ministers
8. Initiating, assessing and making recommendations regarding actions related to the preparation of the tourism sector in Poland for cultural and sporting events that are hosted in Poland, such as the 2012 UEFA European Football Championship	Minister Competent for Tourism and Ministers who are members of the Interministerial Team as appropriate	2008–2012	Part 40 of the State Budget – “Tourism” and funds allocated under the Budget Act to particular administrators, who are members of the Interministerial Team, which is going to be appointed by the Ruling of the President of the Council of Ministers

2. Financing of tasks recommended to all entities acting for tourism development (Level II)

Tasks related to the realisation of the *Directions...* in 2008 will be financed by particular entities under their budgets and will not be related to the necessity of generating additional burden for the public finances sector, including mainly for the State budget and budgets of local self-government units.

The tasks recommended to all entities acting for tourism development (Level II) will be financed within the resources of the tourist system participants, i.e.:

- Government administration entities (from the financial resources of the State budget);
- local self-government entities of all levels;
- business entities and their associations;
- universities, entrepreneurs carrying out education activity;
- regional and local tourist organisations;
- non-governmental organisations;
- local communities.

In recent years, the tourism expenditure of the local self-government entities (i.e. self-governments at the level of voivodeship, powiat, cities with powiat powers and gmina) in section 630 "Tourism" have significantly increased. In 2006, they amounted to **PLN 161 million** (rise by 47% in relation to 2005).

598 gminas (i.e. 24% of all the gminas in total) allocated funds from their budgets for section 630 „Tourism” in 2006. In relation to 2005 this was a small decrease (compared to 2005, the number of gminas expending funds for tourism was smaller by 13).

In 2006 – as in the previous years – the largest funds for tourism were expended by self-governments at the level of gmina and cities with powiat powers.

Expenditure of self-governments at the level of voivodeship, powiat, cities with powiat powers and gmina for section "Tourism" in 2004-2006* (in PLN)

Specification	2004	2005	2006	change 2005/2004	change 2006/2005
Voivodeship self-government in total	8,671,798	12,879,267	13,770,583	+48.5%	+6.92%
Powiat self-government in total	3,335,021	4,499,213	3,452,323	+34.9%	-23.27%
Self-government of cities with powiat powers in total	17,182,872	40,996,055	29,522,225	+138.6%	-27.99%
Gmina self-government in total	43,862,738	51,139,330	114,399,230	+16.6%	+123.70%
Total	73,052,429	109,513,865	161,144,361	+49.9%	+47.15%

Source: Prepared in the Tourism Department on the basis of CSO (GUS) data.

* Transfers of funds between particular self-governments' levels have not been included.

Bearing in mind the data presented above it may be anticipated that in 2008–2015, the expenditure of self-governments at the level of voivodeship, powiat, cities with powiat powers and gmina in the section “Tourism” will at least remain at a similar level. Taking into consideration the increase tendency in self-government expenditure for section “Tourism” in the last five years, it may be also expected that this expenditure will be increasing.

The resources from the European Union structural funds in 2007–2013 will also provide significant support for tourism development in Poland. Legal rules providing for the support of tourism development are present in the Operational Programmes 2007–2013, which are implementing programmes for the cohesion policy of the European Union.

The Innovative Economy Operational Programme 2007–2013 provides for the support of tourism from the structural funds at a national level under two measures. Measure 6.4. “Investments in tourist products of a suparegional importance” provides for the support of investments in order to create competitive, innovative and unique tourist products of suparegional nature. Therefore, the IE OP provides for support of projects with the greatest tourist importance which will contribute to the increase of Poland’s attractiveness in the light of the preparation to the organisation of European Football Championship EURO 2012 as well as those projects, which will allow for the tourism development in several voivodeships.

Measure 6.3. “Promotion of Poland’s tourist values” is a second measure related to tourism. This measure aims at strengthening of the competitiveness of the economy through the promotion of Poland as a country attractive for tourists.

It is expected that owing to the structural funds from the measure 7.1. “Information society – establishing electronic administration” of the Innovative Economy Operational Programme, both the scope and the rate of technological changes related to the National Tourist Portal will be increased.

The Eastern Poland Development Operational Programme provides for financing of the programmes that may influence tourism development in the areas of Eastern Poland.

Measure III.2. Infrastructure for congress and fair tourism will support projects related to the infrastructure development and modernisation or reconstruction enabling organisation of fairs, exhibitions, congresses and conferences of a suparegional and international significance; measure V.1. Promoting sustainable development of tourism will support projects aiming at the preparation of conditions for tourist attractiveness and promotion of Eastern Poland as a place of active leisure; and a complex project aiming at creating basic infrastructure connected with handling bicycle traffic will be realised under measure V.2 Bicycle routes.

On the other hand, it is planned that under the Operational Programme Infrastructure and Environment (OP IaE) there will be implemented projects of a suparegional significance, inter alia, in the field of cultural heritage preservation and protection (projects to be implemented include the projects of revitalisation, revalorisation, conservation, renovation, preservation, restoration or reconstruction, adaptation of historical buildings and complexes of buildings along with their surroundings for cultural purposes) and cultural infrastructure. The expected result of the priority axis XI Culture and cultural heritage OP IaE implementation will be, inter alia, an increased attractiveness of the country for citizens, tourists and investors.

As for the Operational Programme Human Capital, it is of a horizontal nature and the tourist sector may take advantage of it on a general basis.

Tourist projects may be also supported by the European Territorial Co-operation Programmes, e.g. in Poland-Czech Republic and Poland-Slovakia Programmes, in which tourism has been very strongly emphasised.

Co-financing of measures related to tourist services is also provided for under the European Agricultural Fund for Rural Development in the framework of the Rural Development Programme 2007–2013. Axis 3 Quality of life in rural areas and diversification of rural economy provides for two measures with an aim to, inter alia, grant aid for undertaking or developing activity in the field of tourist services and connected with sport, recreation and leisure, i.e. “Diversification towards non-agricultural activity” and “Establishment and development of micro-enterprises”. Also the measure “Village renewal and development” under axis 3 and measures implemented under axis 4 “LEADER” will have influence on tourism development in rural areas and in particular on raising tourist attractiveness of these areas.

A lot of space is devoted to supporting tourism in the 16 regional operational programmes, which are consequently taking tourism into consideration. Those programmes provide for the development and modernisation or reconstruction of the local tourist basis such as accommodation and catering infrastructure, public tourism and recreation infrastructure, spa infrastructure, tourist information system and the promotion of tourism.

This information is only a guideline for the entities, institutions and organisations operating for tourism in Poland, which aim to present the priorities of its development in our country. Acquisition of the above mentioned financial measures in the framework of structural funds for measures contributing to the implementation of the mission adopted in the *Directions...* depends only on these entities' commitment and activity.

In cases, in which the financing of measures specified in the *Directions...* (both at the I and II level) will fulfil the premises of public aid within the meaning of Article 87(1) of the Treaty establishing the European Community, granting of this aid should be carried out in accordance with the public aid rules.

Priority area	Implementing entities	Implementation period	Sources of financing
I. Highly competitive tourist product	Minister Competent for Tourism and cooperating institutions, Ministers as appropriate, local self-government entities, regional and local tourist organisations, non-governmental organisations, entrepreneurs, Polish Agency for Enterprise Development, research and development units, Central Statistical Office of Poland (GUS).	2008–2015	<p>EU Funds with national financial engineering from the State budget resources, budgets of local self-government units and private resources.</p> <p>Innovative Economy Operational Programme – EUR 138 million.</p> <p>Regional Operational Programme – approx. EUR 0.9 billion.</p> <p>The Eastern Poland Development Operational Programme provides for financing of programmes, which may have influence on the tourism development in the Eastern Poland areas. Funds in the amount of EUR 109.22 million are planned for the implementation of measure III.2 “Infrastructure for congress and fair tourism”; EUR 5.88 million for measure V.1 “Promoting sustainable development of tourism” and EUR 50 million for measure V.2 “Bicycle routes”.</p> <p>Furthermore, it is possible to use resources from the following Operational Programmes: European Territorial Co-operation Programmes, Operational Programme Infrastructure and Environment, Operational Programme Human Capital.</p> <p>Under the European Agricultural Fund for Rural Development in the framework of the Rural Development Programme it is possible to co-finance tasks related to the development of tourist services.</p>
II. Development of human resources contributing to tourism development	Minister Competent for Tourism and cooperating institutions, Ministers as appropriate, local self-government entities, regional and local tourist organisations, non-governmental organisations, entrepreneurs, Polish Agency for Enterprise Development, higher education, research and development units, Central Statistical Office of Poland (GUS).	2008–2015	<p>EU Funds with national financial engineering from the State budget resources, budgets of local self-government units and private resources.</p> <p>It is possible to use resources from the following Operational Programmes: Operational Programme Human Capital, European Territorial Co-operation Programmes.</p>

Priority area	Implementing entities	Implementation period	Sources of financing
III. Marketing support	Minister Competent for Tourism and cooperating institutions, Polish Tourist Organisation, Ministers as appropriate, local self-government entities, regional and local tourist organisations, non-governmental organisations, entrepreneurs, research and development units, Central Statistical Office of Poland (GUS).	2008–2015	<p>EU Funds with national financial engineering from the State budget resources, budgets of local self-government units and private resources.</p> <p>Innovative Economy Operational Programme – EUR 30 million.</p> <p>Furthermore, it is possible to use resources from the following Operational Programmes: European Territorial Co-operation Programmes and Regional Operational Programmes.</p>
IV. Shaping tourist area	Minister Competent for Tourism and cooperating institutions, Ministers as appropriate, local self-government entities, regional and local tourist organisations, non-governmental organisations, entrepreneurs, research and development units, Central Statistical Office of Poland (GUS)	2008–2015	<p>EU Funds with national financial engineering from the State budget resources, budgets of local self-government units and private resources.</p> <p>It is possible to use resources from the following Operational Programmes: European Territorial Co-operation Programmes, Operational Programme Infrastructure and Environment and Regional Operational Programmes.</p> <p>The Eastern Poland Development Operational Programme provides for financing of programmes, which may have influence on the tourism development in the Eastern Poland areas. Funds in the amount of EUR 109.22 million are planned for the implementation of measure III.2. "Infrastructure for congress and fair tourism"; EUR 5.88 million for measure V.1. "Promoting sustainable development of tourism" and EUR 50 million for measure V.2. "Bicycle routes".</p>

