

RM-111-138-15

RESOLUTION NO. 143/2015
OF THE COUNCIL OF MINISTERS

of 18 August 2015

on the adoption of the Tourism Development Programme until 2020

Pursuant to Article 19(2) of the Act of 6 December 2006 on the principles of development policy (Dz. U. [Journal of Laws] of 2014, item 1649 and of 2015, item 349), the Council of Ministers resolves as follows:

Article 1. The Tourism Development Programme until 2020, annexed to this Resolution, is hereby adopted.

Article 2. This Resolution shall enter into force on the date of its adoption.

PRIME MINISTER OF POLAND

EWA KOPACZ

Certified to be a true copy of the original:

by Jasiński Dariusz

Annex to the Resolution no. 143/2015

of the Council of Ministers

of 18 August 2015

MINISTRY OF SPORT AND TOURISM

Tourism Development Programme

until 2020

Warsaw, August 2015

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I. INTRODUCTION

Tourism is an important sector of the Polish economy. The contribution of the tourism economy to Poland's GDP remains at the level of 5-6%. The sector employs approximately 760 thousand people (4.7% of the total workforce), of which approximately 170-200 thousand are employed in the accommodation and catering services. Annual receipts from international arrivals to Poland amount to EUR 8-9 billion, of which approx. 50% are receipts from inbound tourism.

The tourism economy may significantly contribute to improving the economic, territorial and social cohesion of Poland. Sustainable development of high-quality tourism is among the European Union's priority development directions. This raises the challenge of strengthening the economic and social potential conducive to the growth of the tourism sector, as an element of increasing economic competitiveness of European regions. Tourism is a factor that contributes to economic diversification and generates demand for highly-skilled human resources, innovative services, modern management tools (including Information and Communication Technologies - ICT) and research and analysis projects supporting sustainable economic development through tourism. All this creates new possibilities of approaching tourism development as a part of regional policy, indispensable for strengthening the competitiveness of individual territories.

It seems appropriate, therefore, to develop a proactive and comprehensive programme of tourism development, constituting a part of the overall development policy and coordinated by the Ministry of Sport and Tourism. The programme will make it possible to reduce the fragmentation of the tourism market by adopting an integrated approach to supporting the tourism economy. This will be achieved through focusing on specific tourism products and services, both in urban and rural areas. The programme will enhance innovativeness and creativity of the tourism sector by stronger involvement of representatives of the industry (in particular, SMEs), local government units, and tourist sector associations and organisations. In this modern approach, priority will be given to tourism policy instruments and solutions that foster employment growth and facilitate cooperation between businesses and their environment based on a network model of sharing economic resources and strengthening regional growth potentials. Such measures should build on uniform principles of cross-cutting support to tourism, based on modern qualitative and strategic criteria. The programme will set a new framework for the development and support of tourism as a part of Poland's modern national economy.

The objectives of the new tourism development framework until 2020 take into account the following aspects:

1. The *Europe 2020* strategy changes the European Union's approach to tourism, considering it to be an area of competitiveness of EU enterprises;
2. The perception of tourism as a competitive and innovative sector of the European Union economy means that tourism development is regarded to be a cross-cutting area related to other EU policy areas such as free movement of people, goods and services, small and medium-sized enterprises, consumer protection, environmental protection and counteracting climate change, as well as regional policy;

3. Thanks to the new approach, tourism is perceived as a factor increasing territorial cohesion and boosting regional development. The European Union provides a framework conducive to economic development and, through the exchange of good practices, facilitates cooperation between Member States in this field;
4. Within the European Union structures, tourism is coordinated by Directorate General Enterprise and Industry of the European Commission. This is related to the fact that European policy closely associates the support for tourism with the development of entrepreneurship. This approach should also be reflected in relevant Polish strategic documents and in Poland's cohesion policy programming documents for the period 2014-2020;
5. The process of tourism development needs to rely on the region's potentials and resources as the basis for economic revival of individual territories through the use of modern tools providing support to entities, enterprises and institutions from various sectors (economic recovery and regional product specialisation of individual areas);
6. Tourism and tourism policy need to be more closely related to the processes of revitalization of cities and urban space development;
7. The use of natural resources and landscape values, resulting from increased activity of rural areas will, to a large extent, provide a basis for the development of sustainable tourism (agritourism and new forms of activity in rural areas);
8. Strengthening the economic significance of tourism should be achieved also through the promotion of tourism as part of the European economy;
9. Tourism is an area generating regional specialisations based on regional resources and infrastructure, regional products, cooperation and innovation networks, and product and technology chains;
10. The new tourism policy requires also the strengthening of human resources for tourism and the increase of management competences and skills of the sector's leaders, organisers and service providers , inter alia through providing access for entrepreneurs and tour operators to knowledge and tourist service certification and standardisation systems. The activities in this area should be developed through modern ICT tools and platforms and through access to programmes improving the skills and competences of tour operators.
11. The main pillars of the new approach to the development of tourism should be as follows:
 - strengthening the competences and quality in the tourism sector,
 - improved cooperation in the promotion of Polish tourism's priority product areas and the exchange of good practices,
 - development and use of modern ICT tools for tourism businesses, and the implementation of modern e-service initiatives and projects in tourism,
 - development of integrated tourism development networks covering different actors involved in improving the competitiveness of the tourism economy

(entrepreneurs, business environment organisations, research entities, financial institutions); this will entail the establishment of stronger inter-sectoral connections of tourism and increase its economic impact.

II. RELEVANT STRATEGIC DOCUMENTS

1. Strategic documents at the European level

Europe 2020 Strategy

The main strategic document of the European Union until 2020 is the "*Europe 2020. A strategy for smart, sustainable and inclusive growth*" COM (2010), Brussels, 3 March 2010. As the main development direction for Europe, the strategy indicates smart, sustainable and inclusive growth.

The document sets out a vision of Europe in 2020, indicating as priorities the following three interrelated areas:

- Smart growth - developing an economy based on knowledge and innovation. The growth is going to be pursued by way of three flagship initiatives in the fields of: innovation (the flagship initiative *Innovation Union*), education (the flagship initiative *Youth on the Move*), and digital society (the flagship initiative *A digital agenda for Europe*),
- Sustainable growth - promoting a more resource efficient, greener and more competitive economy. Within this priority support will be provided to two areas: climate, energy and mobility (the flagship initiative *Resource efficient Europe*) and competitiveness (the flagship initiative *An industrial policy for the globalization era*),
- Inclusive growth - fostering a high-employment economy delivering social and territorial cohesion. This priority indicates two strategic areas: employment and skills (the flagship initiative *An agenda for new skills and jobs*) and fighting poverty (the flagship initiative *European platform against poverty*).

Tourism may be an area of innovative products, solutions and cooperation processes, including interregional and inter-sectoral cooperation involving the R&D sector in the development of a modern economy. In the new cohesion policy formula, the European Commission encourages solutions that approach tourism as an element of broader development through constructing appropriate management and support criteria for tourism projects constituting components of socio-economic solutions.

Fig.1. Potential impact of tourism in the EU Cohesion Policy 2014-2020



Source: BDKM Grupa Doradcza Sp. z o.o. for MST, based on Europe 2020 Strategy

The Tourism Development Programme until 2020 (TDP 2020) is in line with all the priorities of the Europe 2020 Strategy. Yet, of particular importance for its implementation is the increase of the competitiveness of the European economy under the priority of sustainable development. In this area, within the flagship initiative *An industrial policy for the globalization era*, aimed at improving the business environment (in particular for small and medium-sized enterprises) and at promoting the development of strong and sustainable industrial base (ready to compete in global markets), one of the goals is to increase the competitiveness of European tourism.

In the document entitled *A New Industrial Revolution*, published in 2013 and emphasizing the role of new approach to industrial policy in Europe, the European Commission indicated tourism as a key sector of the European economy.

The main instrument for implementing the Europe 2020 Strategy is the EU's cohesion policy for 2014-2020. Poland is getting prepared for the implementation of the next financial perspective of the European Union. On 23 May 2014, the European Commission adopted the Partnership Agreement, the key document setting out the strategy of investing the European Funds in the new perspective.

The EU regulations for 2014-2020, among the thematic objectives and the investment priorities aimed at their achievement, do not directly indicate tourism. However, tourism-related activities may be implemented under specific thematic objectives.

Within the thematic objective 3 *Enhancing the competitiveness of small and medium-sized enterprises, the agricultural sector (for the EAFRD) and the fisheries and aquaculture sector (for the*

EMFF) it is possible to implement activities related to increasing the competitiveness of enterprises, including those from the tourism sector.

Within the thematic objective 6 *Preserving and protecting the environment and promoting resource efficiency*, an essential supporting component of the European Union intervention is the protection and promotion of cultural heritage of global and European significance. This will be supplemented by cultural heritage-fostering measures resulting from regional and local development strategies and contributing in a significant and specific way to the diversification of local economy (tourism, local products, activities aimed at protecting cultural landscapes of urban and rural areas). In addition, also within this objective, among measures relating to biodiversity, implementation is possible of activities aimed at developing infrastructure for the appropriate orientation of tourism towards areas of high natural value. This allows, on the one hand, to ensure better protection of the environment, and on the other hand to increase the tourist attractiveness of those areas.

Moreover, projects related to tourism may be implemented under the European Regional Development Fund, as part of measures involving the use and development of areas' endogenous potentials resulting from their specific conditions and natural, spatial and cultural resources.

Measures are also envisaged within the thematic objective 2 *Enhancing access to, and use and quality of, information and communication technologies* and digital solutions for digital e-culture inclusion.

Within the thematic objective 4 *Supporting the shift towards a low-carbon economy in all sectors* it will be possible to implement pro-environmental measures such as thermal upgrading of buildings, installation of solar panels, etc. Under the thematic objective 7 *Promoting sustainable transport and removing bottlenecks in key network infrastructures* bicycle paths may be built to support public transport systems in cities.

Provisions relating to the development of tourism are also included in the 16 Regional Operational Programmes. They relate, inter alia, to the revitalization of degraded areas, industrial areas and areas in need of comprehensive investments and cluster building.

The European Union Strategy for the Baltic Sea Region (EUSBSR)

The main objective of the EU Strategy for the Baltic Sea Region (EUSBSR) is to strengthen the cooperation in the region to make use of its potential. The strategy covers the macro-region around the Baltic Sea, and applies to EU Member States: Denmark, Estonia, Finland, Lithuania, Latvia, Germany, Poland and Sweden, as well as non-member countries: Belarus, Norway and Russia.

Tourism is one of the priority areas of the strategy. The development and promotion of sustainable and innovative tourism products and services at the cross-border and transnational levels allows to emphasize the advantages of the region as a tourist destination. Thanks to highlighting the common cultural and natural heritage and history, the cooperation in the field of tourism will bring economic benefits to the region.

The protocol on sustainable tourism to the Framework Convention on the Protection and Sustainable Development of the Carpathians

The aim of the Protocol is to strengthen and facilitate cooperation between the Parties thereto: the Czech Republic, Poland, Romania, Serbia, Slovakia, Ukraine and Hungary towards the development of sustainable tourism in the Carpathians with a view to maximize economic benefit and protect biodiversity. To achieve the objectives of the Protocol, it is required to harmonize and coordinate efforts towards developing and promoting sustainable tourism in the Carpathians and to implement policies aimed at developing cross-border cooperation in the area of tourism.

2. Strategic documents at the national level

The Tourism Development Programme until 2020 (TDP 2020) has been developed in accordance with applicable Polish regulations including, in particular, the Act of 6 December 2006 on the principles of development policy (Dz. U. [Journal of Laws] of 2014, item 1649 and of 2015, item 349). Pursuant to Article 9 of the said Act, the development policy in Poland is carried out based on the following strategic documents:

- The Long-term National Development Strategy Poland 2030. The Third Wave of Modernity (LTNDS) – a document indicating the main trends, challenges and concept of the development of the country in a long-term perspective, adopted by the Council of Ministers on 5 February 2013,
- The National Development Strategy 2020: Active Society, Competitive Economy, Efficient State (NDS 2020) – a document updating the National Development Strategy 2007-2015, adopted by the Council of Ministers on 25 September 2012,
- other development strategies - documents laying down the key conditions, objectives and directions of development in specific areas indicated in the Medium-Term National Development Strategy 2020 and relating to regional development, spatial development and the development of individual sectors or areas. Currently, there are 9 development strategies (so-called integrated strategies) in force:
 - ✓ Strategy for Innovation and Economic Efficiency “Dynamic Poland 2020”, adopted by the Council of Ministers on 15 January 2013,
 - ✓ National Strategy of Regional Development 2010-2020: Regions, Cities, Rural Areas, adopted by the Council of Ministers on 13 July 2010,
 - ✓ Strategy for Sustainable Development of Rural Areas, Agriculture and Fisheries for 2012–2020, adopted by the Council of Ministers on 25 April 2012,
 - ✓ Efficient State Strategy 2020, adopted by the Council of Ministers on 12 February 2013,
 - ✓ Strategy for Energy Security and the Environment, adopted by the Council of Ministers on 15 April 2014,
 - ✓ Transport Development Strategy until 2020, adopted by the Council of Ministers on 22 January 2013,
 - ✓ Social Capital Development Strategy 2020, adopted by the Council of Ministers on 26 March 2013,
 - ✓ Strategy for Development of the National Security System of Poland 2022, adopted by the Council of Ministers on 9 April 2013,

- ✓ Human Capital Development Strategy 2020, adopted by the Council of Ministers on 18 June 2013.

The integrated strategies are implemented in accordance with development programmes i.e. operational and implementing documents which outline measures to be implemented within the funding and implementation system set out in Article 15 of the Act of 6 December 2006 on the principles of development policy.

For further development of tourism in Poland, the strategies of key importance are:

- The Long-term National Development Strategy Poland 2030. The Third Wave of Modernity (LTNDS),
- The National Development Strategy 2020: Active Society, Competitive Economy, Efficient State (NDS 2020),
- 5 integrated strategies:
 - ✓ Strategy for Innovation and Economic Efficiency "Dynamic Poland 2020" (SIEE) together with the Enterprise Development Programme until 2020 (EDP), adopted by the Council of Ministers on 8 April 2014,
 - ✓ National Strategy of Regional Development 2010-2020: Regions, Cities, Rural Areas (NSRD),
 - ✓ Social Capital Development Strategy 2020 (SCDS),
 - ✓ Strategy for Sustainable Development of Rural Areas, Agriculture and Fisheries for the period 2012–2020 (SSDRAAF),
 - ✓ Transport Development Strategy until 2020 (TDS).

The Tourism Development Programme until 2020 is an implementation programme for the Strategy for Innovation and Economic Efficiency "Dynamic Poland 2020"; the programme is in line with the objectives and measures set out in the above-mentioned integrated strategies.

In the ***Long-term National Development Strategy Poland 2030. The Third Wave of Modernity***, the main objective is to improve the quality of life of Poles. The achievement of this objective should be measured by the increase of gross domestic product (GDP) per capita, the increase of social cohesion and the reduction of territorial inequalities, as well as the scale of civilization leap and innovativeness of the economy in relation to other countries.

This objective may be achieved through measures to be taken in the following three areas:

1. Competitiveness and innovation (modernisation);
2. Balancing (diffusion) of the development potentials of the Polish regions;
3. Effectiveness and efficiency of the state.

The Tourism Development Programme until 2020 is strictly in line with the measures provided for within the areas 1 and 2.

The National Development Strategy 2020, as a medium-term document, indicates three strategic areas of intervention:

- I. Effective and efficient state;
- II. Competitive economy;
- III. Social and territorial cohesion.

TDP 2020 is consistent with the objectives of the strategic area II *Competitive economy* including, in particular, the following objectives:

- ✓ II.2.1. Increasing the productivity of the economy;
- ✓ II.2.2. Increasing the share of medium and high-technology industries and services;
- ✓ II.2.4. Improving conditions for conducting business activity;
- ✓ II.3.1. Increasing demand for scientific research results;
- ✓ II.3.4. Increasing the use of innovative solutions;
- ✓ II.4.2. Developing human capital;
- ✓ II.5.2. Increasing the use of digital technologies;

and with the objectives of the strategic area III *Social and territorial cohesion*, including:

- ✓ III.3.1. Creating institutional, legislative and financial conditions for the implementation of development activities in the regions;
- ✓ III.3.3. Creating conditions for the development of regional, sub-regional and local urban centres, and strengthening the potential of rural areas.

In the **Strategy for Innovation and Economic Efficiency "Dynamic Poland 2020"** (SIEE), the main objective is a highly competitive (innovative and effective) economy based on knowledge and cooperation. This objective should be achieved through four specific objectives:

- ✓ Objective 1. Adjustment of the financial and regulatory environments to the needs of an innovative and effective economy;
- ✓ Objective 2. Stimulating innovation by increasing the knowledge and work efficiency;
- ✓ Objective 3. More efficient use of natural resources and raw materials;
- ✓ Objective 4. Greater internationalisation of the Polish economy.

TDP 2020, as an implementing programme for SIEE, is in line primarily with objective 1, action line 1.4: Easy access to capital for enterprises at all stages of their development, with particular emphasis on high-risk capital and the SME sector, and with objective 2, action lines:

- ✓ 2.2. Developing a framework for innovation policy;
- ✓ 2.3. Promoting cooperation in the innovation system;
- ✓ 2.4. Developing an innovation culture and a wider engagement of the society in the process of innovation;
- ✓ 2.5. Supporting the development of human resources for innovative and efficient economy;

as well as with objective 4:

- ✓ action line 4.3: Promoting the Polish economy, Polish businesses and the image of Poland on the international arena.

3. Regulatory framework for tourism development

a) at the European Union level

The main indications regarding the tourism sector development directions are included in the following European Union documents:

1. The Treaty of Lisbon (TFEU) providing that tourism falls within the scope of actions to "support, coordinate or supplement the actions of the Member States".
2. The European Commission Communication *Europe, the world's No. 1 tourist destination, a new political framework for tourism in Europe* COM (2010) 352, Brussels, 30 June 2010 - improving the competitiveness of tourism in the context of maintaining the quality of the offer and its compatibility with sustainable territorial development.
3. Proposal for a Regulation of the European Parliament and of the Council on support for rural development by the European Agricultural Fund for Rural Development (EAFRD) COM (2011) 627 final, Brussels, 12 October 2011, which states that mechanisms for supporting rural tourism should encourage increased employment in rural areas and contribute to the activation of rural population.
4. The European Commission Communication *"Common Agricultural Policy towards 2020: meeting the food, natural resources and territorial challenges of the future"* COM (2010) 672, stating that tourism stimulates activities related to food, natural resources and territorial aspects.

b) at the national level

The fundamental legislative act regulating the powers of the minister responsible for tourism is the Act of 4 September 1997 on the sectors of the governmental administration (Dz. U. of 2015, item 812). The Act, in its Article 27, assigns to the Minister of Sport and Tourism responsibilities with regard to:

- tourism development in the country,
- tourism market regulation mechanisms.

The Minister's responsibilities are referred to in the Regulation of the Prime Minister of 22 September 2014 on the specific responsibilities of the Minister of Sport and Tourism (Dz. U. item 1263), which in its Article 1(2)(2) assigns to the minister the responsibility for managing the governmental administration sector "tourism". In the state budget, the allocations to the sector "tourism" include:

- promotion of tourism,
- other activities.

The minister responsible for tourism is the minister holding the responsibilities referred to in the Act on Tourist Services of 29 August 1997 (Dz. U. of 2014, items 196 and 822) and the Act on the Polish Tourist Organisation (Dz. U. No. 62, item 689, as amended), hereinafter referred to as the Act on PTO. Under the act, the minister responsible for tourism supervises the Polish Tourist Organisation (PTO). The main tasks of the PTO are as follows:

- promoting Poland as an attractive tourist destination,
- ensuring the operation and development of the Polish tourist information system in the country and abroad,
- initiating, evaluating and supporting the plans of the development and modernization of tourism infrastructure.

III. DIAGNOSIS

The contemporary world is changing rapidly. The factors that determine those changes (e.g. the ever-present globalization and information technologies) significantly influence also the development of tourism. The monitoring of those changes makes it possible to take attempts to adjust to them and, primarily, to forecast their impact on the occurrence new future trends and to respond to them by applying new solutions. “Changes in the global environment, referred to as global challenges, have a significant impact on the development of the economy and science. The main challenges include: demographic change, on-going process of global and regional integration, climate change, and changing approach towards innovation.

The societies of the OECD and EU Member States are growing old and therefore the proportion of people in retirement age is steadily increasing. In order to maintain a high economic growth rate and to counteract the negative effects of demographic change, it will be necessary to increase the labour productivity by means of technological and social innovations. The immigration rate especially from countries outside the OECD, may inevitably increase, which in turn may cause social and political problems.

As the reduction in labour intensity of the contemporary economies is in progress, a new interdisciplinary branch of the economy, the so-called leisure industry, is intensively developing. It is related to the rest and spending leisure time by individuals on their own interests and needs. The recipient of the leisure industry products and services is the so-called leisure generation which represents all age groups. This creates additional opportunities for the development of tourism, sports and cultural and entertainment industries and the related creative industries as well as a range of services, including medical services.

The proceeding globalisation which takes a form of an increased mobility of capital and workforce is one of the major challenges. Economic, technological and scientific links both at the state level as well as at the micro scale between enterprises, universities, public laboratories and regional authorities become stronger. This process is accompanied by a departure from the traditional sources of competitiveness in its international dimension, such as low labour costs and access to cheap natural resources, in favour of intangible assets rooted in people, organisations, communities and regions – such assets create the intellectual capital. (...)

The above trends are accompanied by a change in the approach towards innovation. The role of social and organisational innovation is growing, compared to technological innovation of hardware type. Significance of intangible factor is growing in the innovation area (know-how, marketing, information, resource management, tacit knowledge). Furthermore, the importance of outsourcing, especially at the stage of research work, and the importance of technology market and of technologically advanced SMEs are growing. Relationships among different market participants (competitors, co-operators, customers) in the area of learning become more intense. The traditional divisions between different sectors (for example agriculture and processing industry), industries (integration of rail, road and sea transport), fields of operation (trade, education, entertainment and tourism) and between different types of scientific research (basic and applied research) and development works are fading away. (...)

At the same time, the experience and current development trends as well as assumptions of rational conduct of all economic operators do not allow to define economic changes in detail, even in the medium perspective. The current progressive changes are not continuous, and the technological progress compel the development of industries that just few years ago have been marginal or unknown."¹

The answer to the challenges of the modern world, also in the area of tourism, is competitiveness, innovation and smart specialization.

Tourism is a vital part of the national economy. It is a rapidly growing sector with a relatively large impact on economic growth and employment in Europe and in Poland.

The EU tourism industry directly generates more than 5 % of the EU's GDP, with about 1.8 million businesses employing around 5.2 % of the total labour force (approximately 9.7 million jobs). When related sectors are taken into account, tourism indirectly generates about 12 % of employment.² Europe is no. 1 tourist destination in the world. Despite persistent economic slowdown across much of Europe, in 2013 most tourist destinations reported a growth in international arrivals. This was particularly visible in smaller European countries such as Iceland and Slovakia which recorded a surge in arrivals of 30% and 20%, respectively. Meanwhile, Montenegro, Latvia, and Croatia achieved a growth of around 9% each. Bulgaria, Malta, Poland, and Hungary grew by approximately 7% each.³

According to the World Travel and Tourism Council - WTTC, the travel and tourism sector was the only one to report an increase in 2011.⁴ At the same time, however, a decrease in Europe's position in the global tourism should be noted. Europe's share in the total number of foreign tourist arrivals has been steadily declining: in 1980 it amounted to 61%, but in 2010 it dropped to 51%. Forecasts of the World Tourism Organization (UN WTO) indicate that in 2030 the share will amount to approximately 41%.

Compared to other countries in Europe and in the world, Poland as a tourist destination still has an unsatisfactory share in tourism. According to the recent World Economic Forum report on the competitiveness of tourism in over 130 surveyed countries, in 2013 Poland held the 42nd place (the

¹ Strategy for Innovation and Efficiency of the Economy "Dynamic Poland 2020" (SIEE) selected quotations from the excerpts from " Development trends and social and economic background " (pp. 11-16).

² A New Industrial Revolution. European Union Explained. The European Commission, 2013, p. 15.

³ European Tourism in 2013: Trends & Prospects (Q2/2013), p. 5.

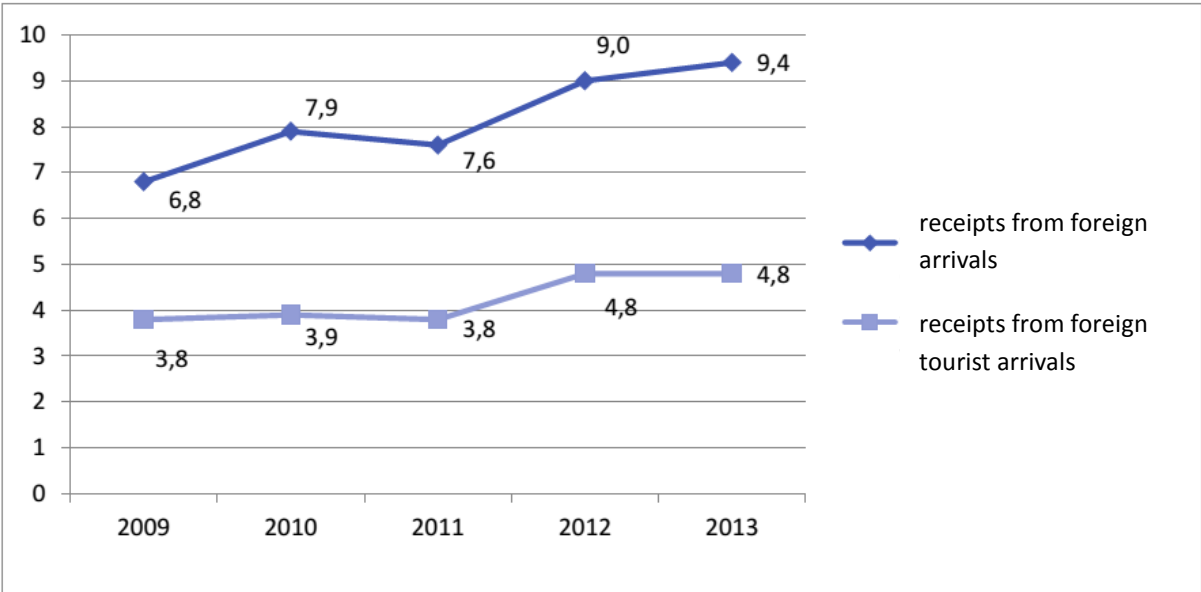
⁴ *Travel & Tourism Economic Impact 2012. World*, World Travel & Tourism Council, WTTC, 2012.

indicator is constructed based on 14 specific indicators jointly covering three areas of concern). However, the country’s continuous progress in this field should be noted: in 2009, Poland held the 58th place, but in 2011 it held the 49th place.

In Poland, the contribution of the tourism economy to the country’s GDP for many years has remained at the level of 5-6% (with a drop to 5.2% in 2009 and 2010, and to 4.8% in 2011; in 2012, the tourism economy’s contribution to GDP recovered to the level of 6%, and increased even further to 6.4% in 2013). International tourism receipts in 2013 accounted for 6.1% of the country’s overall export receipts. In 2013, the number of persons employed in jobs related to accommodation and catering services⁵ was 244.7 thousand. The highest number of persons employed in such jobs was recorded in 2008 when it reached 274.7 thousand. At the same time, the number of persons working in the tourism economy is estimated at approx. 760 thousand which represents 5-6% of the total working population. According to expert estimates, one job in the tourism sector generates 3-4 other jobs in tourism-related infrastructure.

Annual receipts from foreign arrivals to Poland amount to EUR 8-9 billion, of which about 50% comes from foreign tourist arrivals.

Fig. 2. Receipts from foreign arrivals and foreign tourist arrivals to Poland in 2009-2013 (in EUR billion)

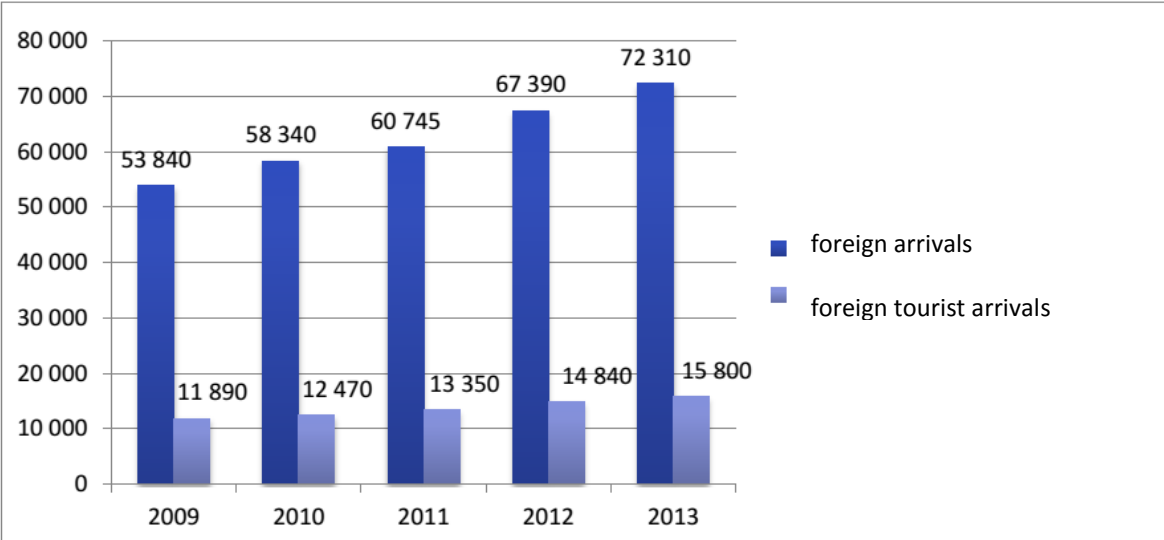


Source: MST Department of Tourism, based on statistics of the Institute of Tourism, Activ Group and the National Bank of Poland (NBP)

Foreign tourist arrivals to Poland have increased in the last years from less than 12 million in 2009 to 15.8 million in 2013.

⁵ According to the Central Statistical Office classification of employment, Section I: activities related to accommodation and catering services.

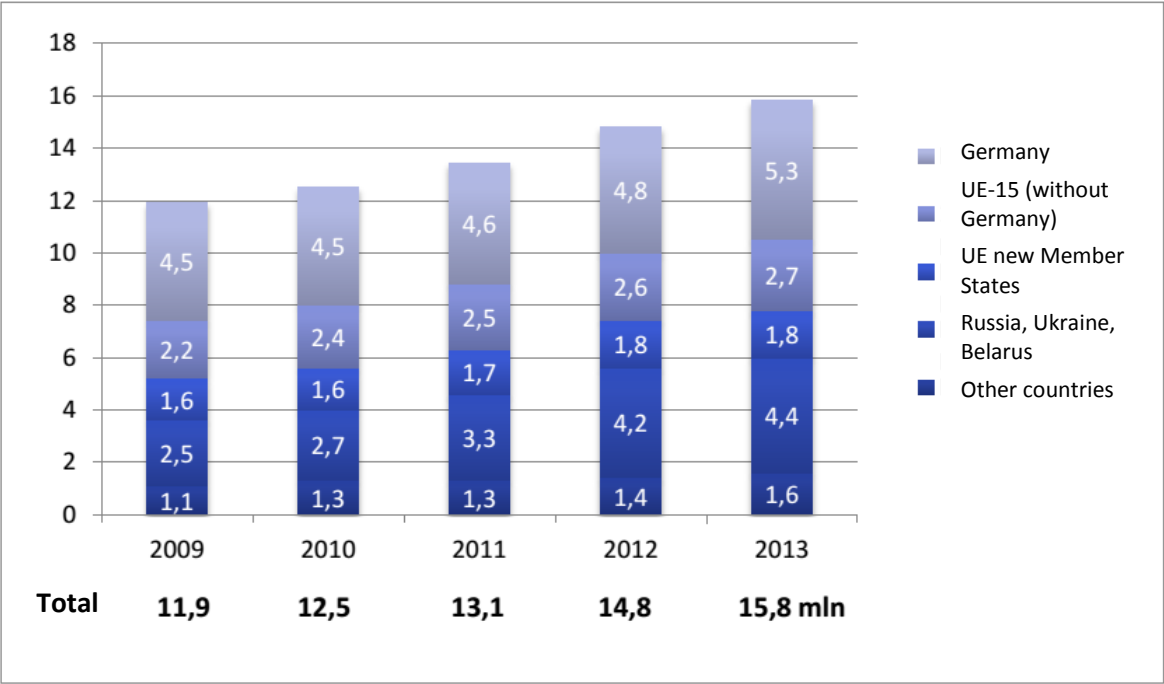
Fig. 3. Foreign arrivals and foreign tourist arrivals to Poland in 2009-2013 (in thousand)



Source: MST Department of Tourism, based on surveys carried out by the Institute of Tourism and Activ Group

The main source countries of inbound tourism to Poland are Germany, Russia, Belarus and Ukraine. Their shares in overall tourist arrivals have been significantly increasing in the last years. The arrivals of citizens of other EU countries (both EU15 and the new member states without Croatia) have remained unchanged.

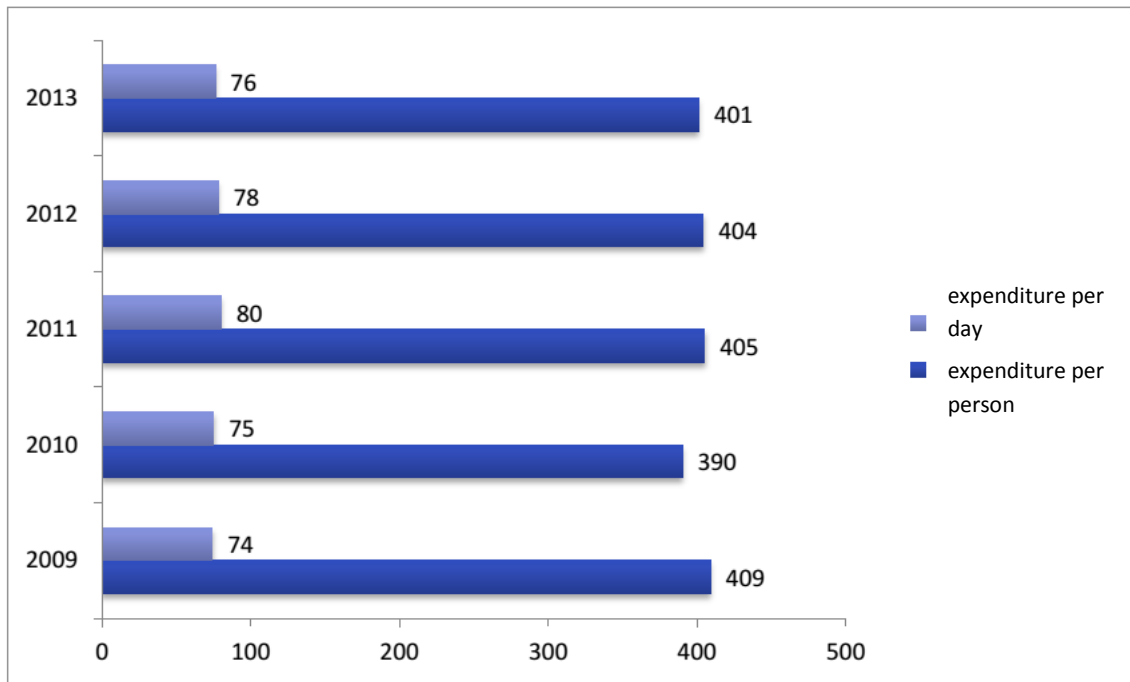
Fig. 4. Foreign tourist arrivals to Poland (in million)



Source: MST Department of Tourism, based on surveys carried out by the Institute of Tourism and Activ Group

Foreign tourist expenditure in Poland (both travel and daily expenditure) has remained stable.

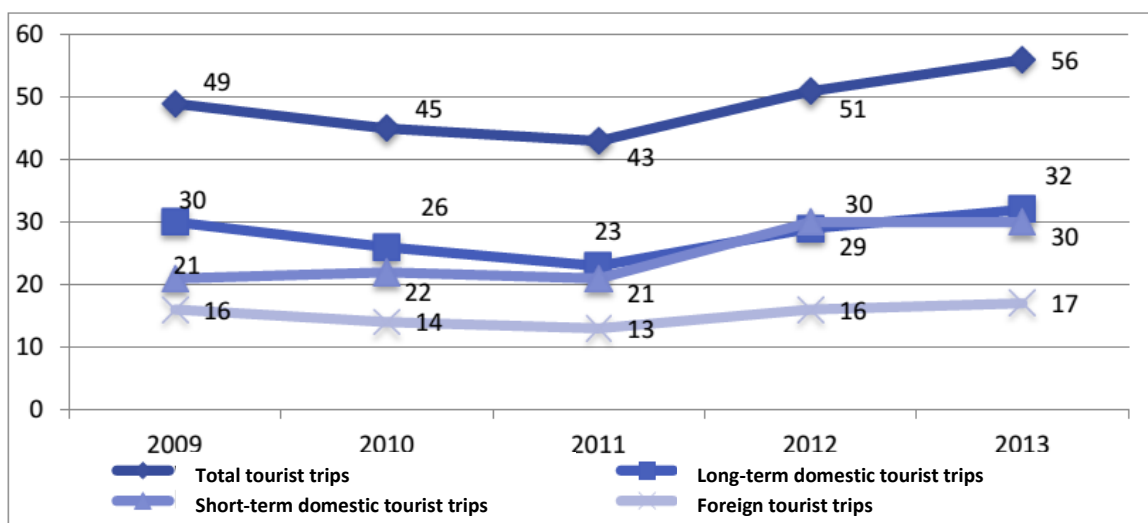
Fig. 5. Foreign tourist expenditure in Poland per day and per person in 2009-2013 (in USD)



Source: Surveys carried out for MST by the Institute of Tourism and Activ Group

After a temporary decline in 2010 and 2011, the total number of tourist trips of inhabitants of Poland increased again in 2012 and 2013. It should be emphasized, however, that the number of long-term domestic trips returned to the level from 2009. The situation in the segment of foreign trips was the same. A significant increase was noted only in the category of short-term domestic trips.

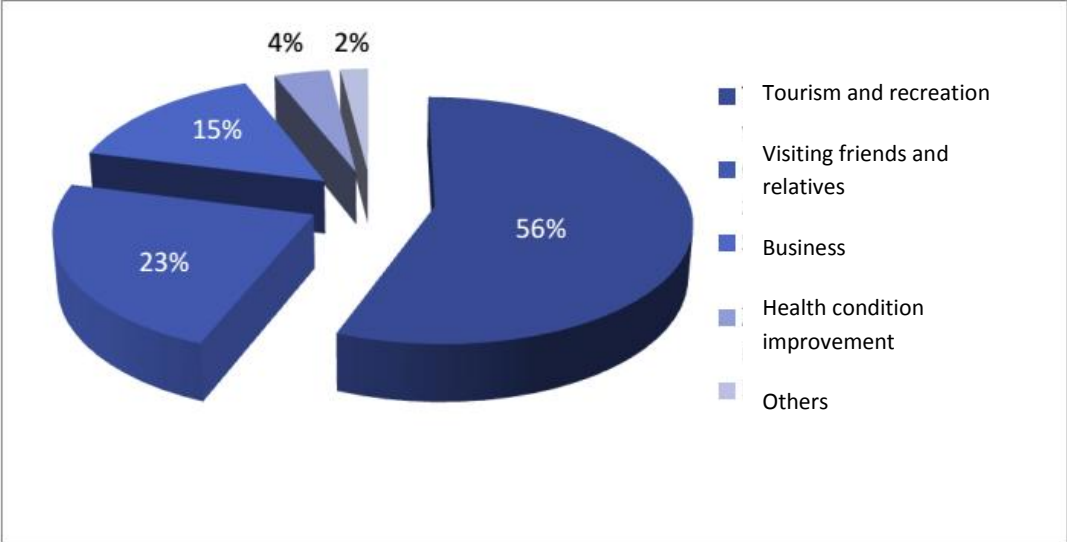
Fig. 6. Participation of Poles in domestic and foreign tourist trips in 2009-2013 (in%)



Source: MST Department of Tourism, based on surveys carried out by the Institute of Tourism and Activ Group

Most of the domestic and foreign trips of the inhabitants of Poland are tourism and recreation trips. In the segment of foreign trips, those aimed at visiting relatives constitute 20% of the total number. However, in the case of domestic trips, those aimed at visiting relatives constitute a vast majority.

Fig. 7. Long-term domestic trips of the inhabitants of Poland in 2013 by purpose



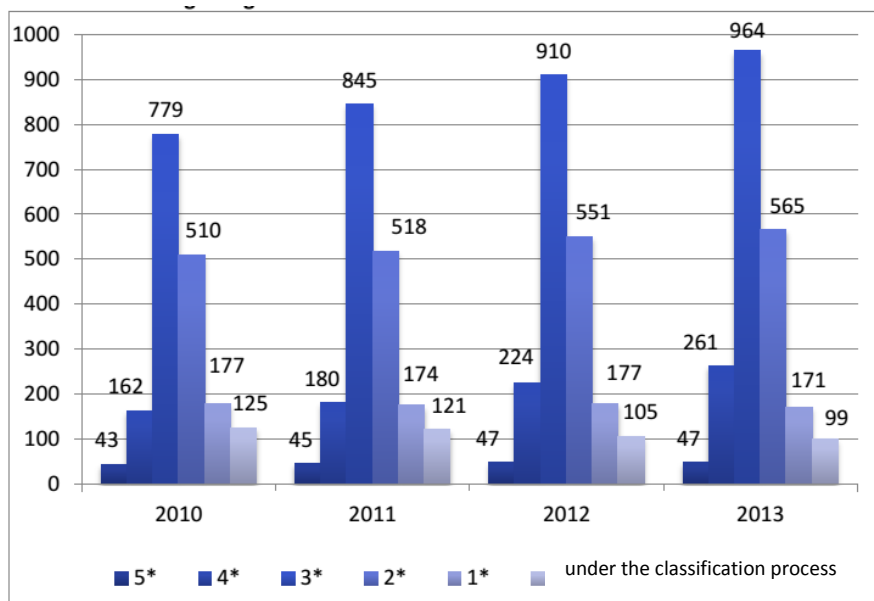
Source: Surveys carried out for MST by Activ Group

According to the Central Statistical Office (CSO) data, most of the tourist accommodation facilities in Poland are medium-sized facilities with about 70 beds on average. Of the overall number of beds, approximately 68% are available all year round. Traditionally, most beds are offered by hotels (approx. 30% of the total number of beds). About 32% of beds in Poland are available only seasonally.

There is a clear dependence between the facility category and the degree of its use.

Most of the hotels are three-star hotels. The largest share of this hotel category has remained unchanged despite an increase in the total number of hotels in the country. The second largest hotel category is two-star hotels whose percentage share in the total number of hotels has been remaining at almost unchanged level too. A significant increase has been noted in the share of five-star and four-star hotels. However, their number increased from a very low level: the number of five-star hotels increased from 35 in 2009 to 47 in 2013 (an increase of 34%), and the number of four-star hotels increased from 141 to 261 in the same period (an increase of 86%).

Fig. 8. Number of hotels by category in Poland in 2010-2013



Source: MST Department of Tourism, quoted after: "Turystyka w 2012 r." ["Tourism in 2012"], CTO, Warsaw, 2013; and other CSO statistics

The share of hotel chains in the overall supply of hotel rooms is increasing. In the largest cities, over 50% of hotel rooms are those made available by hotel chains. In Warsaw and Katowice, their share exceeds 80% of the total number of available rooms. Recent years have also brought an increase in the significance and number of Polish hotel chains, with a strong increase in the number of hotels operating under foreign brands.

Since 2009, the number of people using the services of collective accommodation establishments has been steadily increasing. In total, it has increased by 18% (the overall number of persons accommodated in collective accommodation establishments increased from 19.4 million in 2009 to 22.8 million in 2013). In the case of foreign tourists, in the same period the increase was 35%: from 3.8 million to 5.2 million.

Fig. 9. Number of persons using collective accommodation establishments in 2009-2013 (in thousand)



Source: MST Department of Tourism, quoted after: "Turystyka w 2012 r." ["Tourism in 2012"], CTO, Warsaw, 2013; and other CSO statistics

According to the quoted statistical data, the situation in the tourism sector in Poland in recent years has been fairly stable and has displayed an upward trend.

Poland is a country with rich and diverse nature. An important role in developing the tourist potentials of the country and its individual regions is also played by cultural objects and protected cultural heritage. According to the Central Statistical Office data for 2013, Poland has 822 museums (with the Mazowieckie and Małopolskie regions having the largest numbers of them: 119 in each region). In 2013, Polish museums were visited by over 29 million visitors.

As a member of the European Union and a country with a relatively stable economic situation, Poland attracts domestic and foreign tourists. They are offered numerous tourist attractions and a variety of leisure time activities, including those in the field of active tourism, health tourism and business tourism.

Although the number of foreign tourists coming to Poland is gradually increasing, the increase is not yet satisfactory. In addition, the tourist expenditure in Poland remains at a low level. There is also a slow-down in domestic tourism, with the exception of short-term domestic trips whose number is increasing.

The potential of the tourism sector is under-utilized. The situation is caused by the sector's weaknesses, e.g. insufficient (although improving) accommodation base. The tourist offer is fragmented and is focused primarily on traditional products. There are also insufficiencies in the field of innovative approach to tourism and its products, in particular in the area of innovations relating to service provision organisation, new product development and use of cooperation and synergy results in the provision of services. The industry's organisations and companies do not adequately cooperate with each other in developing new products and services and in implementing development projects. The sector's companies are mainly small and medium sized enterprises struggling, as in other sectors, with insufficient qualifications of employees and with limited access to finance for their development needs. Those deficiencies result, inter alia, in a high seasonality of tourist service provision.

All those factors limit development possibilities of individual companies, institutions and organisations, as well as entire regions, and prevent a more effective use of existing resources. These deficiencies are even more visible in the light of the changes on-going in global tourism.

Despite the above-mentioned problems, tourism in Poland has a large potential for development. An essential prerequisite for this development is to release regional potentials and emphasize local specializations in tourist services and tourism-related sectors. According to the *Travel & Tourism Competitiveness Report 2013*, in that year Poland held the 42nd place (among 140 surveyed countries) in the tourism competitiveness ranking. The country was ranked 7 positions higher than in 2011 when it came 49th (of 139 participants). The report analysed the synthetic *travel and tourism competitiveness index* composed of 14 pillars (business environment, environmental sustainability, safety and security, health and hygiene, prioritization of travel and tourism, air transport infrastructure, ground and port infrastructure, tourist service infrastructure, ICT readiness, price competitiveness in the T&T industry, human resources and labour market, international openness, natural resources, and cultural resources and business travel). The report clearly shows that Poland is competitive because of its tourist potential resulting from the country's anthropogenic and natural resources (the 18th place and the 66th place, respectively). Poland was also positively evaluated in

terms of environmental sustainability of tourism (37th place), human resources (32nd place) and ICT infrastructure (41st place). The authors of the idea and methodology of compiling the travel and tourism competitiveness index emphasized that the ranking of countries, developed based on the index, is positively (and relatively strongly) correlated with the individual countries' numbers of tourist arrivals and tourism receipts.

Thanks to the development of tourism it is possible to achieve synergies between the development of economic, cultural and recreation functions, and the development of infrastructure and space for economic and social activities. It is therefore necessary to stimulate the development of tourism towards the creation of innovative tourism products competitive at the regional and national level, and to increase the innovativeness of the tourism sector and entities operating within it. It is also necessary to take measures towards innovating the tourist service organisation system through the use of e-services and networking of tourism sector entities; this should be done through creating, e.g., conditions conducive to new forms of cooperation, including the establishment of clusters. It is also important to develop a system of financial support for the tourism sector, inter alia in the form of repayable instruments. This approach to tourism requires also competence increase and capacity building among the sector's employees, and efficient management systems for tourist projects. Activities should be taken to improve the legal environment for tourism, also with regard to the protection of tourist service consumers. The aforementioned measures carried out in cooperation with local governments and tourism sector organisations have long-term impact on the development of a competitive tourism economy.

Tourism may become a modern sector of the economy, based on smart specialization, open to innovation, contributing to strengthening the competitiveness of Poland, and constituting a key factor of regional development.

Poland's tourist potential by regions

The increase of Polish regions' competitiveness through the development of tourism has a two-fold rationale. Firstly, tourism displays constant growth on the global scale. Secondly, the possibility of using tourism as a major development factor for the Polish regions derives from the proper use of the country's cultural and natural resources and tourist infrastructure, and the inclusion of tourism in development activities.

Poland's advantageous geographical location in Europe, as well as its natural and cultural resources and spa facilities constitute a large but currently underused development potential. Mountains in the south, and the Baltic Sea coast in the north, are the country's most attractive tourist areas. Between them there are lake districts with systems of waterways. The country has also large forests which account for about 30% of its territory. The significant tourist potential of Poland includes also its rich and diverse cultural heritage, including palaces with surrounding parks, castles, manors, monuments of industry and technology, fortifications and other historical military objects, historical urban systems and villages. Polish regions have also rich natural resources, including significant mineral deposits.

The cultural and natural values of the country are reflected in the number of sites inscribed in the UNESCO list of World Cultural and Natural Heritage. Among them are historic city centres (Kraków, Warsaw, Zamość, Toruń), religious buildings (wooden Catholic churches and Orthodox churches in the Małopolskie and Podkarpackie regions, the Churches of Peace in Dolnośląskie region, the Kalwaria Zebrzydowska Mannerist Architectural and Park Landscape Complex in the Małopolskie region), industrial heritage sites (the salt mines of Wieliczka and Bochnia) and other sites (the Malbork castle, the Centennial Hall in Wrocław, the Muskauer Park), places of remembrance (Auschwitz-Birkenau) and areas of exceptional natural value (Białowieża Forest).

As concerns natural values, several Polish regions have large areas of particular value in terms of nature and landscape. Those areas are located in the following regions: Dolnośląskie, Małopolskie, Lubuskie, Zachodniopomorskie, Pomorskie, Warmińsko-Mazurskie and Podlaskie⁶. Another important category of natural assets is agricultural areas which are considered attractive for the development of agritourism, rural tourism and ecotourism.

A large potential for tourism development exists in regions where airports, in particular those served by low-cost airlines, are located. The availability of relatively inexpensive transport, combined with attractive and appropriately promoted tourism products, is a factor which strongly contributes to the development of tourism and, consequently, to overall economic growth of Polish regions, thus increasing the competitiveness of the country. The large tourism potential of the regions is also related to the increasing mobility and affluence of societies, and to Poland's advantageous geographical location. In 2004-2013, Poland noted a three-fold increase in air passenger traffic. In 2013, the country had 13 airports (Bydgoszcz, Gdańsk, Katowice, Kraków, Lublin, Łódź, Modlin, Poznań, Rzeszów, Szczecin, Warsaw, Wrocław and Zielona Góra). According to experts, until 2033 the sector will continue to increase in Poland by approximately 6% per year, which creates opportunities for further development of tourism.

A key element in releasing the tourism potential is the development of tourism products, primarily at the local level, in cooperation between the tourism industry and local governments, and at the regional level in the case of products extending beyond one region. The method of work "from an idea to a product" underlies actions taken in this field, and the principle "think globally, act locally" should be commonly applied.

The creation, development and commercialization of tourism products amplifies the synergy effect, enables the concentration of resources, makes it possible to meet the growing customer demands and, consequently, increases the competitiveness of Polish tourism. This objective can be achieved through the co-operation between areas, service providers and other entities that create the tourist offers that is complementary and attractive because of its diversity.

Based on the recommendations contained in the study "*Analysis of competitive advantages of Poland's regional tourism markets*" the Polish tourist regions should build their clear images, relating to high-standard tourist services combined with specific features of a given region, including its

⁶ op. cit.

multi-dimensional cultural and historical heritage and individual product offer that should be based on its distinctive features, attractive for international tourists.⁷

The development of tourism in the **Dolnośląskie** region of Poland [Polish: województwo dolnośląskie] is based on its diversified natural conditions conducive to the development of various forms of tourism, including active tourism and health-resort and spa tourism (the region has 11 officially listed health resorts). It also has two national parks: the Karkonoski park and Góry Stołowe [Stołowe mountains] park. Other major attractions include the Milicke Ponds (in the Barycz river valley in Bory Dolnośląskie Forest), and the already mentioned sites inscribed in the UNESCO World Heritage List. There are also numerous castles, e.g. Czocho, Książ and Chojnik.

The tourism potential of the **Kujawsko-Pomorskie** region [Polish: województwo kujawsko-pomorskie] is based on its natural environment values thanks to which numerous health-resorts have been established. Recreation and active tourism is developed e.g. through various cultural and sporting events. The diverse natural environment allows the development of agritourism. The region's rivers (Wisła, Brda, Wda and Drwęca) and numerous lakes (Koronowskie, Górzno, Włocławskie) constitute a significant potential which should be appropriately used. As regards cultural tourism, the key destinations are the medieval city of Toruń (inscribed in the UNESCO World Heritage List), Biskupin, Chełmno medieval buildings, Teutonic Order castles, and sites related to the earliest years of Poland's statehood: Mogilno, Strzelno and Kruszwica.

In the **Lubelskie** region [Polish: województwo lubelskie], cultural heritage is the main asset and the basis for the development of tourism. The region has many urban tourist destinations - the historical cities and towns such as Lublin (inscribed in the UNESCO World Heritage List), Zamość, Nałęczów, Kazimierz Dolny, Janów Podlaski and Chełm, as well as precious natural areas: the Poleski and Rztoczański national parks.

Natural and cultural values represent a significant potential for the development of tourism in the **Lubuskie** region [Polish: województwo lubuskie]. The region develops various forms of tourism: sightseeing, recreation, active, health and cultural tourism, as well as ecotourism and agritourism. The natural areas with the greatest potential in the region include: Bory Dolnośląskie forest, Puszcza Drawska forest, Puszcza Notecka forest, national parks (Ujście Warty park and Drawieński park) and landscape parks e.g. the transboundary Geopark Muskau Arch. The rivers (Noteć, Warta and Odra) and their valleys, as well as watercourses are also important for tourism development.

The **Łódź** region [Polish: województwo łódzkie] has a potential for the development of active tourism, rural tourism and business tourism. The region's tourist attractiveness is caused by its unique geographical location in the heart of Poland, the natural diversity and a variety tangible and intangible cultural assets. There are several European cultural routes coming across the region: the Romanesque route, the Cistercian route, the Warsaw-Vienna Railroad route, and the Grunwald route. The natural assets include the Pilica and Warta rivers and their valleys, and the Sulejowski and Jeziorsko water reservoirs. The city of Łódź has numerous historical industrial architecture sites and city buildings. Other main town and cities are Piotrków Trybunalski, Tomaszów Mazowiecki,

⁷ Barteczko K., Grabowski J., Wrzosek A., 2003, *Analysis of competitive advantages of Poland's regional tourism markets*, Instytut Koniunktur i Cen Handlu Zagranicznego, Warsaw

Opoczno, Łowicz, Nieborów and Skierniewice. In the region, several international-level art and music festival are held.

The **Małopolskie** region [Polish: województwo małopolskie] has an exceptionally rich cultural and natural heritage that determines its tourist attractiveness. The region has also five national parks: Tatrzański, Gorczański, Babiogórski, Ojcowski and Pieniński. The rich and varied mineral water deposits allowed the development of health-resort and spa tourism. Kraków, due to its unique cultural heritage, is among the main inbound tourism destinations in Poland. In the region, there are numerous top quality venues where high-profile international-level events, including business events, are held. The region is developing active tourism and its mountain part is the largest winter-tourism destination in Poland. The Małopolskie and Podkarpackie regions are strongly involved in the international project of building the Carpathian region's tourist brand CARPATHIA.

The **Mazowieckie** region [Polish: województwo mazowieckie] is varied in terms of local folk cultures, has a very rich history, many unique historical sites and modern cultural institutions. Its cultural heritage includes historic buildings in the capital city of Warsaw, in Płock, Pułtusk, Żelazowa Wola, and Czerwińsk at the Wisła river. Mazowsze has also a large natural and landscape potential: Kampinoski National Park, 9 landscape parks and numerous nature reserves.

The **Opolskie** region [Polish: województwo opolskie] has numerous natural and anthropogenic assets. The most important ones are the monuments of history: Góra Św. Anny (St. Anne's Mountain) and the medieval city centre and fortifications in Paczków. There are also many industrial heritage sites and facilities related to the development of decorative arts and crafts, which can be turned into tourist attractions. The region is famous for its local cuisine. Many local products are included in the regional, national and European lists of traditional cuisine products. Therefore, the development of culinary tourism in the region should be of particular importance.

The **Podkarpackie** region [Polish: województwo podkarpackie] has many attractions (museums, thematic routes, etc.) relating to its multicultural history and tradition resulting from its location in a border region. It has particularly strong possibilities of developing cultural tourism (6 sites inscribed in the UNESCO World Heritage List). It is also a region with a very diverse landscape (mountains, hills and plains), large forests, many rivers and protected natural areas. Therefore, it has good conditions for the development of all forms of active tourism and rural tourism.

The **Podlaskie** region [Polish: województwo podlaskie] belongs to the area called "the green Lungs of Poland". The potential of the region is based on the attractiveness of its nature: wetlands that are unique for Europe, very large forests and numerous lakes. Of great importance, both in terms of nature and the region's history, are the rivers Narew, Biebrza and Bug together with their valleys, where three national parks are located: Białowiecki, Narwiański and Biebrzański), as well as Suwalsko Augustowski lake district with its Wigry National Park and the Augustów Canal.

The tourist potential of the **Pomorskie** region [Polish: województwo pomorskie] is based on its landscape and cultural values. The largest numbers of tourists visit the Baltic Sea coast, the Kaszuby Lake District and the Tri-City. The region has two national parks: Słowiński park and Bory Tucholskie park. Areas with a large potential for developing a tourism and recreation offer also include: the Charzykowska plain, Bytowskie lake, Słowińskie coast, and the Wisła river and valley. The cities with the highest concentration of movable and immovable heritage assets are: Gdańsk, Gdynia, Sopot, Słupsk and Malbork. Of tourist interest are the European Solidarity Centre and the Museum of

Amber. The appropriate use of the cultural heritage may contribute to employment growth and, through the tourist offer diversification, to greater environmental sustainability. The Pomorskie region has, and makes use of, a large potential for developing modern ICT-based services such as the Interactive Tourist Information System.

The **Śląskie** region [Polish: województwo śląskie] has a tourist potential based on its anthropogenic and natural assets. It has a rich industrial heritage (e.g. the Industrial Monuments Route). A large part of the region in the south is characterized by beautiful landscapes of the western part of the Beskidy mountains and of the Kraków-Częstochowa upland. In addition, the province has a potential to develop industrial heritage tourism, active tourism, agritourism and religious tourism with main focus on the Virgin Mary shrines (Jasna Góra in Częstochowa and the sanctuary in Piekary Śląskie), as well as culinary tourism (the “Śląskie smaki” [Śląsk regional flavours] Festival).

The **Świętokrzyskie** region [Polish: województwo świętokrzyskie] has valuable natural features and is among the country’s regions with the least polluted environment (65% of the region’s area enjoys some form of protection). There is a strong potential for the development of health-resort and spa tourism, also because of mineral water resources (e.g. in Busko-Zdrój and Solec-Zdrój). The key tourist attractions include: Świętokrzyski national park, the Paradise Cave [Polish: jaskinia Raj], the country’s oldest oak tree Bartek, Cistercian monasteries in Jędrzejów, Koprzywnica and Wąchock, and the region’s capital Kielce. The main anthropogenic assets include e.g. the Świętokrzyskie Mountains Archaeological and Geological Route, the Museum of Nature and Science, the Environmental Museum in Starachowice, and the industrial heritage museum in the former Polish Industrial District. Architectural attractions are located, among others, in Sandomierz, Wiślica, Opatów, Chęciny and Ujazd.

The **Warmińsko-Mazurskie** region [Polish: województwo warmińsko-mazurskie] has unique geographical features enabling the development of tourism, in particular leisure tourism, eco-tourism and active tourism (e.g. sailing). The region has several gothic architecture monuments (castles) and technical heritage sites (the historical railway bridges in Stańczyki, the Elbląg Canal and the Mazury channel). An important element in the development of tourism is the recreational use of local forests.

The **Wielkopolskie** region [Polish: województwo wielkopolskie] has significant cultural and natural resources that can be used for the development of tourism. The rich history and culture of the region is reflected in a large number of historical buildings (churches, palaces and castles) which represent a large potential for the development of cultural tourism and religious tourism. The region is also crossed by numerous thematic tourist routes, including the Piast Dynasty Route, the main image-building tourism product of Wielkopolska, and at the same time the oldest tourist route in Poland. It connects the main sites related to the earliest years of Poland’s statehood. Water tourism is also developed along the Great Waterway Loop of Wielkopolska, a water route along the Warta river, the Noteć river (E70 International Waterway connecting the river systems of Eastern and Western Europe), the Bydgoszcz Canal, the Brda River and the delta of the Wisła River.

The **Zachodniopomorskie** region [Polish: województwo zachodniopomorskie] is a region rich in inland waters, with a long sea coast line. It has an extensive network of ports and marinas, established as a branded tourism product called the West Pomeranian Sailing Trail [Polish: zachodniopomorski szlak żeglarski]. It runs along the river Oder, via Szczecin, Dąbie Lake, Szczecin

Lagoon, into the Baltic Sea and along its coast. Zachodniopomorskie is among the regions with the largest number and area of protected Natura 2000 sites, most of which are special protection areas for birds. The region has two national parks -Woliński park and Drawieński park, and seven landscape parks. According to a tourism survey, visitors arriving to the region like leisure tourism (at the sea and the lakes), as well as sightseeing and active tourism including the use of tourist trails. The region is also developing health-resort and spa tourism (in Kołobrzeg, Kamień Pomorski, Połczyn Zdrój, Świnoujście and Dąbki).

IV. TRENDS IN TOURISM DEVELOPMENT

Despite the economic downturn over the last several years, the global tourism industry is reporting a steady moderate growth. Recent statistics show that in OECD countries, tourism directly generates approximately 4.2% of GDP and 5.4% of jobs. Taking into account its indirect contribution, tourism generates about 9% of GDP and jobs. According to UNWTO (the World Tourism Organization) data, international tourism receipts hit a new record in 2012, reaching an estimated EUR 837 billion worldwide, up 4% in real terms from EUR 749 billion in 2011. The number of foreign tourist arrivals exceeded 1 billion. In 2013, the tourism sector results were also good: the number of international tourist arrivals worldwide increased by 5% compared to 2012, and reached 1.087 billion. Europe recorded an overall increase of 5% in the number of international tourist arrivals, with an increase of 7% in Central and Eastern Europe, and of 6% in Southern and Mediterranean Europe.

According to UNWTO forecasts⁸, the upward trend will continue in the next years, with an average annual increase of 3% in the number of international tourist arrivals. As a result, in 2030 the number of foreign tourist arrivals worldwide should reach 1.8 billion. The number of foreign tourist arrivals to Europe should increase by approx. 16 million per year but the biggest increase is forecasted for the emerging economies of the Asia and the Pacific region, rather than for developed countries. By 2030, propensity to travel abroad is expected to increase from the current 11.5 persons to 20 persons of 100, with an increasing share of persons over 55 years of age (currently, those persons account for 23% of all travellers). The main reason for travel will still be holidays (currently, 71% of all trips), followed by business trips and visits to friends or relatives.

The situation and development trends of tourism are strongly influenced by changes in the globalized world economy, such as:

- ✓ political factors: the presence of local and regional-scale conflicts in many regions; this will continue to adversely impact the size and directions of tourism;
- ✓ economic factors: the continuing crisis in many well-developed economies will lead to a decrease in tourist traffic to and from those countries, while increasing tourist traffic to countries with fast-growing economies (BRIC: Brazil, Russia, India and China, and MIST: Mexico, Indonesia, South Korea and Turkey);
- ✓ social factors: the economic growth, increasing education level and general increase in prosperity will affect both the supply side and the demand side of tourism; greater attention will be paid to more sophisticated needs of tourists;

⁸ *Tourism Towards 2030*, UNWTO.

- ✓ environmental factors: the increasing public awareness of environmental and climate issues will bring about changes in the tourist offer, towards ensuring the highest possible level of environmental protection also in the area of tourism;
- ✓ technological factors: the development of information and communication technologies strongly impacts the provision of tourist services but also contributes to their larger availability and adjustment to the diverse needs of consumers.

The above-mentioned factors generate changes in the global tourism. There is a clear trend of tourist travels becoming more frequent but shorter. The preferences for short-distance travel close to home is visible, and domestic tourism is increasing. Tourists more frequently combine several forms of tourism, for instance business tourism and cultural tourism. Visitors increasingly often expect tourist services tailored to their individual needs and providing more authentic experience.

The need to focus on the development of specialized products and offers dedicated to selected consumer groups with specific requirements, seeking to satisfy their needs, is clearly visible e.g. in health tourism, in particular Spa & Wellness tourism, which has become a new form of leisure industry. The key factors for the development of this form of leisure are: the increasing awareness of health and healthcare issues among the societies, in particular senior persons, the popularity of active recreation, and the approach to health as a new lifestyle trend.

The growing interest in pro-health leisure activities opens up a wide range of opportunities for active tourism, with particular emphasis on water and cycling tourism. Customers' expectations can be met by health tourism, nature tourism and rural tourism which, in addition to varied accommodation and cuisine (including traditional organic food), offers numerous activities aimed at improving health, fitness and well-being.

In response to the demand for tourism products offering new, unique experience of high educational value, industrial tourism is developing. Its offer includes both former and still working factories, technology sites and scientific entities. They provide opportunities for extending and diversifying tourist offers, also in regions and cities having no other outstanding tourist attractions understood in the traditional way.

Business tourism is another highly specialized tourism category which enjoys a large interest and growth as a segment of the tourism market.

The increasing number of tourist also contributes to changes in the tourist service provision patterns. The information and communications technologies play an increasingly important role in tourist travel planning and during tourist visits.

In many countries, the role of governments increasingly focuses not on immediate actions in the field of tourism, but rather on ensuring a competitive environment for its development, including through compiling tourism policies and strategies, appropriate prioritization of public budget allocations to tourism, creating an appropriate legal framework, supervising administrative structures responsible for tourism policy implementation, and developing and implementing relevant research programmes in the field of evaluation.

Further accelerated development of tourism in Poland may take place only if the aforementioned new factors and trends are taken into account in the tourist offer. Another essential element that

enhances the attractiveness of individual regions it is their accessibility by various means of transport, ensuring quick and efficient access to the planned destination.

In the modern world, tourism is a network of interrelated activities and mutually dependent services of hotels, restaurants, transport companies, shop owners, tourist attractions and numerous other factors. As a result, there is competition between tourist destinations and between individual service providers. Therefore, cooperation between all stakeholders of the tourism sector is one of the most important elements affecting the development of efficient and innovative tourism strategies, essential for socio-economic development of individual areas.

V. ANALYSIS OF MAIN TOURISM DEVELOPMENT FACTORS

In strategic documents on tourism in Poland, SWOT analysis is most often carried out separately for inbound tourism and for domestic tourism. Although such division is justified, this paper analyses the strengths and weaknesses of tourism in Poland, as well as opportunities and threats for its development, without a breakdown into inbound tourism and domestic tourism, assuming that most of the factors are significant in both segments. According to the SWOT analysis, the strengths and weaknesses are internal factors, while opportunities and threats are external factors that may occur in the future and should be made use of (in the case of opportunities) or should be avoided if possible (In the case of threats).

At the same time, given the fact that the Tourism Development Programme until 2020 is an implementation programme for the Strategy for Innovation and Economic Efficiency "Dynamic Poland 2020" and, as such, is related to national strategic documents (both long-term and medium-term ones) and consistent with the integrated strategies, the *TDP 2020* presents a SWOT analysis relating solely to the tourism sector, assuming that factors of macroeconomic nature and relating to the overall development of the country have been analysed in the SWOT analyses contained in those strategies.

Strengths	Weight = 1.0	Factor intensity	Weaknesses	Weight = 1.0	Factor intensity
1. Biodiversity	0.2	3	1. Insufficient transport connections between many parts of the country, including potential tourist attractions	0.05	2
2. Rich historical and cultural heritage	0.2	3	2. Limited number of products with supra-regional and international significance	0.10	3
3. Projects implemented in 2008-2014 in the tourism sector (infrastructure, culture, recreation)	0.05	2	3. Lack of integrated and innovative approach to the tourist offer	0.10	4
4. Membership in the European Union	0.05	3	4. Insufficiently strong brand "Poland"	0.05	4
5. Maintenance of a fairly good economic situation (stable economy)	0.05	3	5. Large fragmentation of the tourist sector entities (enterprises), and their poor financial standing	0.15	4
6. Potentially wide range of tourism products consistent with general trends in global and European tourism	0.15	2	6. Lack of cooperation between tourism enterprises, and insufficient cooperation between tourism enterprises and tourism institutions and organisations, including RTOs and LTOs	0.20	4
7. A large number of companies and organisations operating in the tourism sector	0.3	3	7. Insufficient qualifications of tourism sector employees	0.15	3
			8. High seasonality of tourism	0.15	3
			9. Increased human pressure on natural areas	0.05	3

Strengths	Weight = 1.0	Factor intensity	Weaknesses	Weight = 1.0	Factor intensity
1. Good economic situation, growing purchasing power of consumers	0.05	2	1. The long-lasting crisis in the European and global markets	0.1	4
2. Availability of EU funds for the tourism sector and infrastructure, in particular transport infrastructure, within the financial perspective 2014-2020	0.15	2	2. No acceleration in the growth of the Polish economy in the coming years	0.1	4
3. Increase of the tourism sector employees' competences e.g. through the implementation of the EQF for tourism and the EU-funded training	0.2	4	3. Currency exchange rate fluctuations	0.1	2
4. Development of new trends, consistent with the global trends, in Polish tourism	0.05	4	4. Deterioration in the quality of tourist offer due to the expectation of low prices	0.2	4
5. Development of innovative tourism products, including integrated tourism product offers	0.15	3	5. The loss of price competitiveness of Polish tourism	0.2	2
6. Cooperation between tourism industry enterprises/ institutions with the education sector	0.2	2	6. Insufficient availability of funds for the development of tourist sector enterprises and institutions	0.2	4
7. Tourist service quality increase	0.1	2	7. Insufficient systemic changes in tourism management	0.1	4
8. Implementation of modern management systems in the tourism sector	0.1	2			

Factor weight and intensity have been determined by experts

Will the identified strengths enable the use of the emerging opportunities?

Strengths/ Opportunities	Improved economic situation and purchasing power	Availability of EU funding	Increase in employees' competences	Development of new trends in Poland	Development of innovative products	Development of cooperation	Increase in quality	New management systems	Weight	Number of interactions	Weight times number of interactions
Diversity	0	0	0	1	1	0	0	0	0.2	2	0.4
Heritage	0	0	0	1	1	0	0	0	0.2	2	0.4
Infrastructure	0	1	0	0	0	0	1	0	0.05	2	0.4
Membership in the EU	1	1	0	0	0	0	0	0	0.05	2	0.1
Stable economic situation	1	1	0	0	0	0	0	0	0.05	2	0.1
Potential wide range of products	1	1	1	1	1	1	1	0	0.15	7	1.05
A large number of players	0	0	0	1	1	1	0	0	0.3	3	0.9
Weight	0.05	0.15	0.2	0.05	0.15	0.2	0.1	0.1			
No. of interactions	3	4	1	4	4	2	2	0			
Weight times number of interactions	0.15	0.6	0.2	0.2	0.6	0.4	0.2	0			

Interactions between the identified strengths and emerging opportunities allow a positive answer to the question

VI. VISION OF TOURISM DEVELOPMENT

1. The vision of tourism development until 2020

Based on the presented diagnosis and SWOT analysis, the vision of the tourism development until 2020 has been determined as follows:

A modern and open tourism economy based on smart tourist specialization of Polish tourist regions, constituting a key knowledge-based factor of the regional and national development and strengthening the country's competitiveness in the European Union.

2. The main priority areas

The vision of tourism as a modern and open tourism economy based on smart specialization and contributing to the strengthening of Poland's competitiveness and constituting a key factor of the country's regional development requires the implementation of comprehensive measures focused on the following priority areas:

- competitive and innovative tourism,⁹
- a modern tourism management system,
- competent human resources for the tourism sector,
- tourism as a factor of regional and local development, enhancing economic and social cohesion of the regions and the country, and improving the quality of life of residents.

The development of tourism as an area focused on the use of potentials for building the country's attractive tourism product is related to specific requirements in the field of environmental protection, sustainable and smart growth, and links with the country's economic policy, including the building of a good image of Poland in the world. A reflection of this approach is to determine goals within the framework of the *TDP 2020*.

⁹ The OECD definition of innovation applies also to tourism: "An innovation is the implementation of a new or significantly improved product (good or service), or process, a new marketing method, or a new organisational method in business practices, workplace organisation or external relations. Innovation activities include all scientific, technological, organisational, financial and commercial steps which actually lead, or are intended to lead, to the implementation of innovations"- The Measurement of Scientific and Technological Activities Proposed Guidelines for Collecting and Interpreting Technological Innovation Data; OSLO MANUAL2005.

VII. OBJECTIVES OF THE TOURISM DEVELOPMENT PROGRAMME UNTIL 2020 (*TDP 2020*)

1. The main objective

The main objective of the programme is: to ***promote the development of competitive and innovative tourism through supporting the tourism sector enterprises, organisations, institutions and initiatives, while respecting the principles of sustainable development.***

The implementation components of the main objective include, inter alia, as follows:

- inclusion, in the system of support to the tourism sector, of innovative solutions based on R&D results and building modern services and offer and creating new tourism products,
- ensuring high-quality services and management by adapting to the sector's needs the potentials of tourism-related areas and fields such as innovative services, e-services, ICT platforms and sales platforms,
- development of cluster networks in tourism,
- strengthening product quality certification systems as marketing and promotion aspects of tourist services,
- the use of regional potentials and resources to develop tourism specializations as part of modern and competitive economy,
- inclusion of support to tourism in building regional cohesion and creating developmental opportunities for the regions based on their infrastructure, assets and tourism development potentials,
- development of human resources' competencies and qualifications and innovation in the management of tourism as an economic sector based on the activity of entrepreneurs and their innovative products and services, and the activity of institutions, organisations and entities pursuing initiatives aimed at strengthening the quality and attractiveness of the national and regional tourist offers,
- integration of the principles of sustainable development in all implemented tasks.

So understood, the main objective is closely linked to the achievement of the NDS 2020 objectives and related development strategies, by taking into account global challenges and development trends (innovation, service modernity, the involvement of science in the tourist innovation development process, sustainable development) and their use for increasing the competitiveness of the economy while enhancing entrepreneurship in the tourism sector. In this regard, tourism, following the achievement of the overriding objective of the *TDP 2020*, will become a sector interrelated to the social and technological development of the economy, e.g. with regard to the rational management of resources, building a healthy society and a sustainable and green economy (organic products and environmentally sustainable tourist services). The *TDP 2020* main objective a framework for strengthening the strategic goals of the NDS 2020 national programming documents.

2 The operational objectives

The operational objectives of *TDP 2020* have been determined based on the strengths and weaknesses assessed in the Diagnosis and relating e.g. to:

- insufficient innovation of the tourism sector,
- insufficient links between tourism and modern economy development policy,
- the need to efficiently use knowledge and competence in managing the tourism sector,
- the need to develop regional specializations based on tourism.

The operational objectives of *TDP 2020* have been formulated as follows:

Operational objective 1: To develop innovativeness, attractiveness and quality of tourist services and products, as an economic competitiveness factor;

Operational objective 2: To strengthen social activity and entrepreneurship in the tourism sector and to increase the competence of human resources;

Operational objective 3: To promote priority tourism products of the country and the regions, as well as their economic specialisations based on tourism;

Operational objective 4: To develop and modernize space for the development of tourism and tourist infrastructure while complying with the principles of sustainable development and environmental protection regulations.

The achievement of the operational objectives of *TDP 2020* will be largely interrelated and complementary to the achievement of the main objective.

A significant element of the determined operational objectives is their consistency with the objectives of the national programmes and strategies, in particular NDS 2020, and the action plans aimed at its implementation: the Strategy for Innovation and Economic Efficiency “Dynamic Poland 2020”; the National Strategy of Regional Development 2010-2020: Regions, Cities, Rural Areas, and the Long-term National Development Strategy Poland 2030; the Third Wave of Modernity.

3 Lines of action, tasks and implementation coordinators

To the *TDP 2020* operational objectives, tasks have been assigned that describe in detail how the objectives should be achieved. Achieving the *TDP 2020* objectives will at the same time contribute to the achievement of the national strategic objectives of NDS 2020. *TDP* will also constitute an operational tool for achieving the development goals in the EU perspective 2014-2020 and for maximizing the use of the EU funds.

Operational objective 1: To develop innovativeness, attractiveness and quality of tourist services and products, as an economic competitiveness factor.

Tasks:

- 1.1. To promote innovation and eco-innovation in tourism and tourist services.
- 1.2. To use modern instruments for financing tourism and innovative enterprises in the sector.
- 1.3. To use the Tourism Observatory-based R&D results in developing innovative tourism products and stimulating inter-sectoral cooperation for the development of the tourism economy and R & D for the tourism sector.
- 1.4. To use intellectual property protection rights in developing solutions for the tourism sector and innovative tourism products.
- 1.5. To build regulatory, institutional and administrative efficiency for the development of tourism, including substantial support for entrepreneurs and associations in the tourism sector.

Implementation coordinator: the Ministry of Sport and Tourism in the role of the National Tourism Management Centre (NTMC), and the Tourism Observatory (the Polish Tourist Organisation - PTO), in cooperation with local and regional governments and tourism sector organisations.

Operational objective 2: To strengthen social activity and entrepreneurship in the tourism sector and to increase the competence of human resources in tourism enterprise management.

Tasks:

- 2.1. To take measures to create a friendly regulatory environment.
- 2.2. To support and develop certification and management systems for the tourism sector.
- 2.3. To include the tourism sector in the Integrated Qualification System.
- 2.4. To support the development of social tourism and sightseeing tourism including, in particular, the participation of children and youth, large families, senior persons and persons people with disabilities in domestic tourism.

Implementation coordinator: the Ministry of Sport and Tourism in the role of the National Tourism Management Centre (NTMC), in cooperation with local and regional governments and tourism sector organisations.

- 2.5. To support clustering in tourism and to promote the cooperation and links and partnerships involving the tourism sector organisations for the development of tourism in the regions and in the country.
- 2.6. To engage local, regional and Euro-region communities in the development of regional tourism economy products and services.
- 2.7. To increase the competences of human resources with the participation of sectoral partners, RTOs, LTOs and other organisations and enterprises from the tourism sector.

Implementation coordinator: the Polish Tourist Organisation (PTO), in cooperation with regional and local tourist organisations, other organisations from the tourism sector, local and regional governments and the Ministry of Sport and Tourism.

Operational objective 3: To promote priority tourism products of the country and the regions, as well as their economic specialisations based on tourism.

Tasks:

- 3.1. To promote regional tourism products and regional tourist specializations.
- 3.2. To use technology tools and instruments for improving the quality of e-information systems and services in the tourism sector, as well as advanced electronic management systems for the development of tourism.
- 3.3. To develop a variety of instruments to support the promotion and export of tourism sector services and products, tourism enterprises and sectors related to the development of tourism.
- 3.4. To support the promotion of tourism and initiatives related to its development, e.g. in the fields of cultural heritage and recreation.

Implementation coordinator: the Polish Tourist Organisation in cooperation with its foreign representative offices, regional and local tourist organisations, other organisations from the tourism sector, and local and regional governments.

Operational objective 4: To develop and modernize space for the development of tourism and tourist infrastructure while complying with the principles of sustainable development and environmental protection regulations.

Tasks:

- 4.1. To support investment into the tourism sector within projects focused on revitalization and development of urban and rural areas and the creation of new services.
- 4.2. To support activities for the development of tourism infrastructure.

Implementation coordinator: the Ministry of Sport and Tourism e.g. in the role of the National Centre for Public-Private Partnership in Tourism, in cooperation with local and regional governments, tourist enterprises and their associations, and other organisations from the tourism sector.

The above-mentioned tasks indicated in *TDP 2020* are consistent with the strategic objectives of NDS 2020, e.g. with regard to the following key tasks implemented by relevant national institutions:

1. To support the development of entrepreneurship, in supplementing the tasks assigned to the Ministry of Economy in SIEE;
2. To support export and investment activities, including within a coherent system of promoting the Polish economy – a task assigned to the Ministry of Economy in SIEE;

3. To introduce a system of innovation development: diversification of instruments, development of relationships between science and business, the use and directing of foreign direct investment - a task assigned to the Ministry of Economy in SIEE;
4. To identify and support modern technologies that constitute competitive advantages of the economy - a task assigned to the Ministry of Economy in SIEE.

The tourism economy development has been approached in an integrated way, to take account of economic, social and cultural aspects as well as regional and rural development aspects. The development of tourism, considered in a systematic way, will integrate tourism strengthening measures based also on other strategies, due to the fact that the support to tourism is a comprehensive area and as such is related to the measures provided for also in other strategies.

A specification of the links between the *TDP 2020* objectives and the strategic documents for 2014-2020 is included in Table 1.

Table 1. Links between the TDP 2020 objectives and the strategic documents for the period 2014-2020

TDP 2020 objective	National Strategy of Regional Development	Strategy for Innovation and Economic Efficiency	Transport Development Strategy	Efficient State Strategy	Strategy for Energy Security and the Environment	Strategy for Sustainable Development of Rural Areas, Agriculture and Fisheries	Human Capital Development Strategy	Social Capital Development Strategy
<u>Operational objective 1:</u> To develop innovativeness, attractiveness and quality of tourist services and products, as an economic competitiveness factor.	X	X				X	X	X
<u>Operational objective 2:</u> To strengthen social activity and entrepreneurship in the tourism sector and to increase the competence of human resources in tourism enterprise management.	X	X		X		X	X	X
<u>Operational objective 3:</u> To promote priority tourism products of the country and the regions, as well as their economic specialisations based on tourism.	X	X				X		X
<u>Operational objective 4:</u> To develop and modernize space for the development of tourism and tourist infrastructure while complying with the principles of sustainable development and environmental protection regulations	X		X	X	X	X		

Source: BDKM Grupa Doradcza Sp. z o.o. for MST

VIII. IMPLEMENTATION PRINCIPLES

1. Management system

The implementation of *TDP 2020*, a comprehensive document of the Ministry of Sport and Tourism determining the lines of action in the tourism sector and adopting a synthetic approach to tourism policy, requires multidirectional and cross-cutting activities, inter alia due to the integration, in the tourism development process, of numerous activity areas requiring the involvement of various institutions and entities.

The *Programme* management system is based on the coordination and cooperation of national, regional and local institutions. The institutions and entities involved in the tourism management system need to have access to effective support tools and instruments (institutional, financial and legislative ones).

The implementation system is based on the use and co-ordination of various support and funding instruments. A key factor is the building of partnerships and links between institutions, entities and enterprises at the national and regional levels. This will allow the involvement, in the implementation of *TDP 2020*, of numerous central and regional public institutions, enterprises and non-governmental organisations operating in the tourism sector.

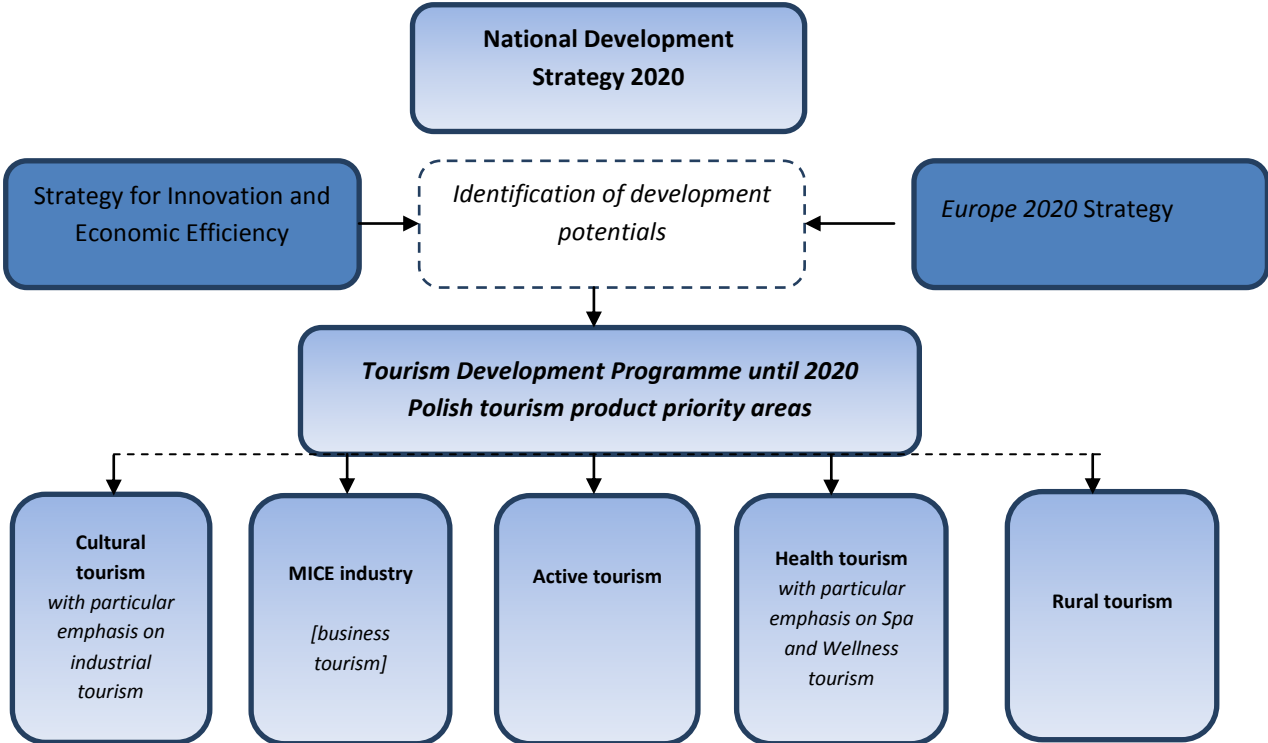
The Ministry of Sport and Tourism (MST) will play a coordinating role in the management of *TDP 2020*. The *TDP 2020* implementation system's organisation is focused on the involvement in the process of central and regional public institutions, enterprises and non-governmental organisations.

From the point of view of inter-ministerial cooperation, the strengthened support to tourism is going to require the cooperation of MST with key ministries responsible for implementing tasks under *NDS 2020* and the integrated strategies and development programmes supporting, inter alia, tasks related to the development of tourism.

In view of the growth potential and competitiveness of Polish tourism products, and trends in the domestic and foreign tourist markets, *TDP 2020* recommends measures for the development and promotion of the following priority product areas of Polish tourism:

- cultural tourism, with particular emphasis on industrial tourism
- the meetings industry (business tourism)
- active tourism,
- health tourism, with particular emphasis on spa and wellness tourism,
- rural tourism.

Fig. 10. TDP 2020 links with relevant national strategies



Source: BDKM Grupa Doradcza Sp. z o.o. for MST

The Ministry of Sport and Tourism, holding the function of the National Tourism Management Centre, will strengthen the mechanism of cooperation with relevant ministries which have impact on the development of tourism and are responsible for development policy, the economy and innovation, activation of rural areas, environmental protection, labour market and social policy, science and higher education, education, arts and culture, and international cooperation. Of large significance for achieving the *TDP 2020* objectives will also be the MST cooperation with governmental agencies, tourist organisations, regional governments and entities operating in the field of tourism development.

Of key importance for the consistency of solutions in the field of tourism development management will be the participation of the Polish Tourist Organisation and regional and local partners – leaders of activities taken in the area of tourism development. An important role will also be played in regional tourism development associations, RTOs, LTOs and other institutions such as regional development agencies, local action groups and regional innovation agencies. Those entities may act as partners in the process of developing regional cooperation networks around the implementation of specific tourism products and services and the determination of regional priorities in this field. Those entities may also be partners in project consortia financed under the Regional Operational Programmes.

Such a system of managing and coordinating the development of tourism, which integrates actions at the national and regional levels, will contribute positively to stimulating the activity of the tourism sector regional organisations focused on service delivery and implementation of new tourism

products. This will apply also to the development of services and products based on regional tourist specializations and resources and tourist values of individual regions. The coordination of the tourism development management system may be carried out in the form of agreements, consultations, information support and competence building support by the Ministry of Sport and Tourism and its individual partners in the tourism development process.

The *TDP 2020* management system will cover the following areas:

- a) strengthening the tourism-related research activity, including those focused on new tourism products and innovations,
- b) coordination and implementation of tourism projects integrated with other areas of support to the tourism economy of the country and its regions.
- c) management of institutional support to tourism sector enterprises, and certification of tourist services.

2. Institutional cooperation

The process of managing the development of tourism until 2020 requires the development of systemic solutions that take into account both European policy challenges and solutions at the national and regional levels. The implementation of *TDP 2020* and the tourism policy framework aimed at economic development should lead to an increase in economic and social activity of regional partners and ultimately generate increased employment in tourism, which will positively contribute to bridging the socio-economic development gap between the regions and within them.

As regards the coordination of institutional cooperation, the Ministry of Sport and Tourism will be responsible for the overall implementation of *TDP 2020* within the institutional cooperation mechanism. The cooperation will involve the implementation of activities involving other ministries, regional and local governments, and the tourism sector institutions and organisations.

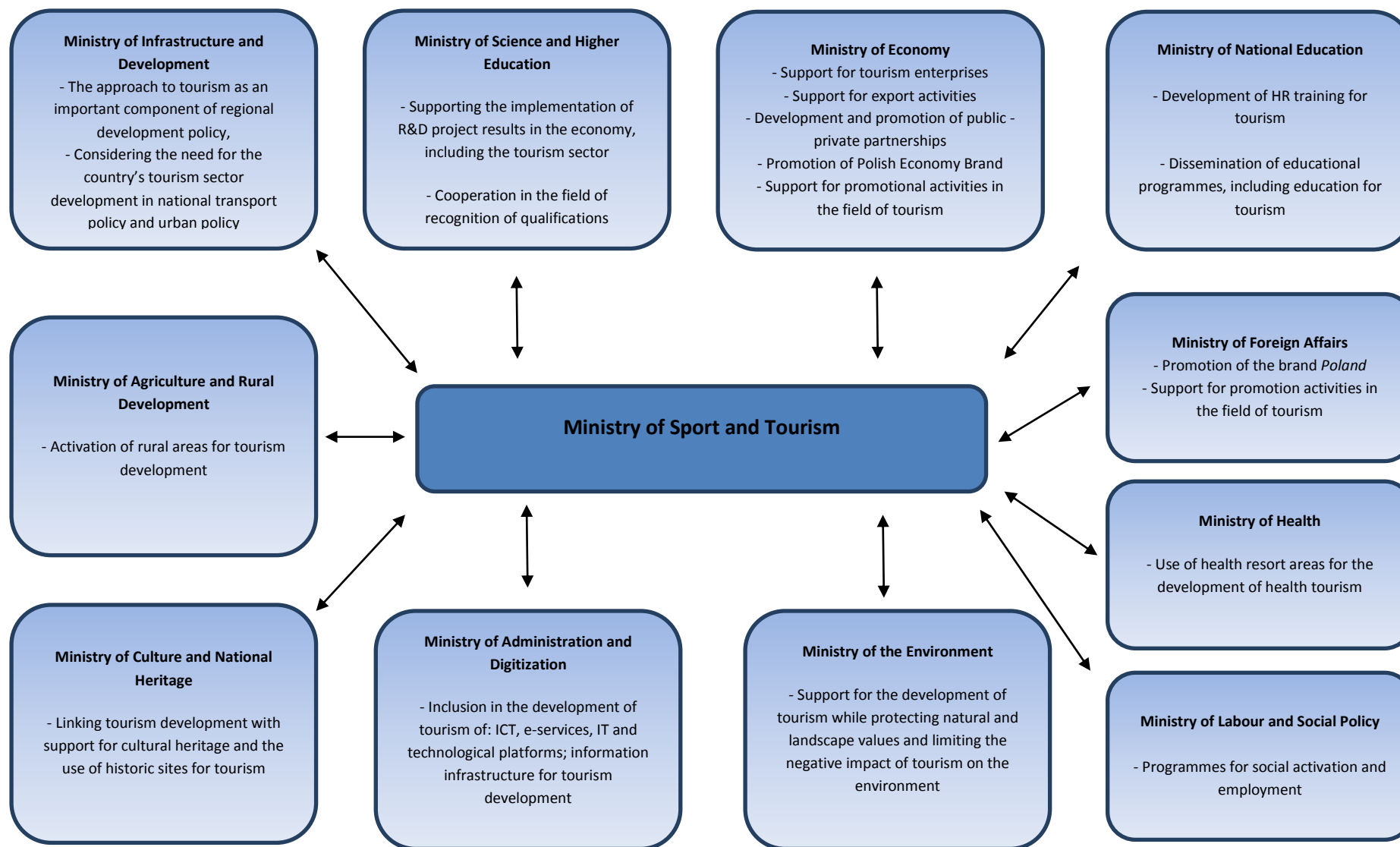
The main task of the Ministry of Sport and Tourism in implementing *TDP 2020* will be to provide a general legal framework and to create conditions for the participation of national and regional entities and organisations in projects related to the development of tourism. An important aspect will be to provide support to the tourism sector entities, organisations and enterprises, e.g. through supporting tourism management, promoting tourism products, establishing cooperation with the tourism network partners and indicating funding and investment possibilities in the tourism sector. The coordination activities will be strengthened also by developing a service quality system within the tasks of the National Tourism Management Centre (NTMC), and by supporting the building of tourism clusters by the Polish Tourist Organisation. The Regional Tourist Organisations (RTOs) and Local Tourist Organisations (LTOs) may play the role of the local and regional cluster coordinators. The Ministry of Sport and Tourism will significantly contribute to the process of supporting and seeking funding for the tourism sector projects by supporting regional entities, organisations and entrepreneurs through promoting public-private partnership (PPP).

An important role in the implementation of *TDP 2020* will be played by the Polish Tourist Organisation (POT) which, besides its statutory activity of promoting Polish tourism and developing relevant tourist information systems, may develop the function of disseminating the tourism sector cluster initiatives. A new element in supporting the development of tourism will be the PTO's Tourism Observatory disseminating R&D trends and activities for the development of tourism.

A key role in the implementation of *TDP 2020*-related tasks will also be played by the central and regional governments that are responsible for the following tasks:

- implementation of the cohesion policy, regional development policy and operational programmes for 2014-2020,
- provision of support to the tourism sector enterprises and innovative product and service solutions,
- development of digital systems and ICT infrastructure to be used also in the tourism economy, and of e-service and efficient management systems with the use of state-of-the-art technologies,
- sustainable use of natural resources for the development of tourism, while protecting the natural and landscape values and developing environment-friendly infrastructure,
- creation of conditions for the development of tourism in rural areas based on their natural values, cultural heritage and environmentally sustainable agriculture,
- promotion of healthy lifestyle, based on individuals' activity in the field of recreation and leisure tourism and the implementation of prevention activities,
- development of education and training for tourism, and dissemination of educational programmes, including in the field of education for tourism,
- actions for the development of qualified human resources for the tourism sector labour market, and for supporting social activity of individuals, groups, social organisations and NGOs,
- creating conditions for the development of public-private partnership (PPP) and public-social partnership (PSP).

Fig. 11. Inter-ministerial cooperation in the implementation of TDP 2020



The Ministry of Sport and Tourism will implement measures for the development of tourism in cooperation with other relevant ministries, which will ensure stronger support to tourism as an economic leverage. The tourism development support system should indicate specific measures and functions of the individual ministries (according to their responsibilities), which make up the overall system.

The management of *TDP 2020* requires MST to develop active relations with European institutions in order to participate in the creation and implementation of the European tourism policy, as well as relations with regional partners.

The European-level relations include, inter alia, the cooperation with the European Commission and its institutions in implementing the EU new Cohesion Policy 2014-2020, and the participation in the development of financing instruments for tourism.

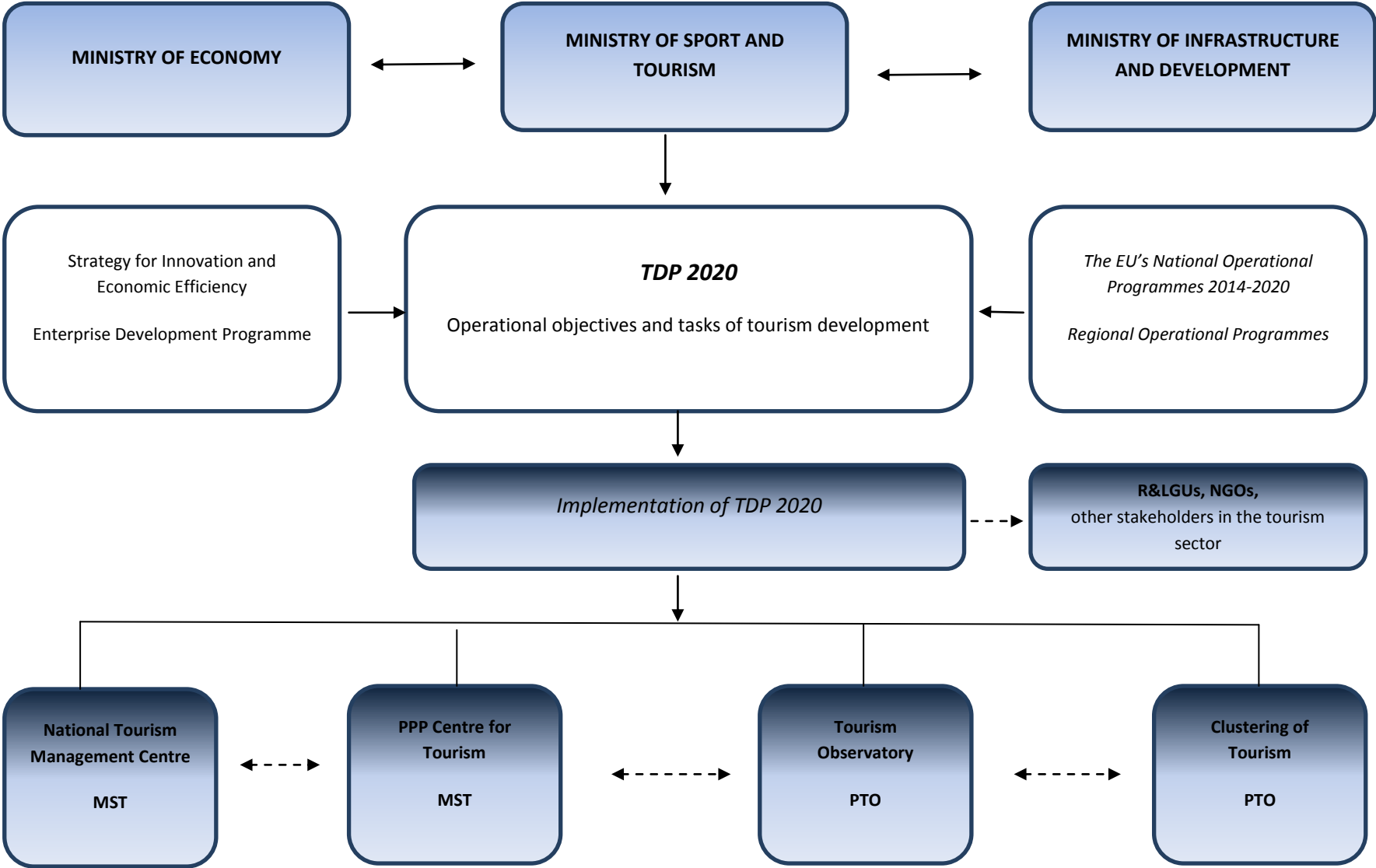
The regional level-relations cover the cooperation with regional governments and organisations. The regional cooperation should be of cross-cutting nature and should relate to tourism financing from regional government budgets and the Regional Operational Programmes (ROP). Their allocations should be used for integrated projects that consist in investing into or providing support to the tourist sector e.g. through urban revitalization and urban policy development or rural area development. An important component of this thematic focus is also the development of diverse regional-level financial support instruments for the tourism sector companies and organisations.

The coordination of tourism development management at the regional level should cover support activities e.g. as follows:

- increasing the competitiveness of small and medium-sized enterprises (SMEs) within the ROP,
- building the country's tourism brand, based on its regional attractions,
- strengthening the attractive tourist image of the country and a given region,
- using landscape values for the development of tourism,
- using regional economic assets and infrastructure for the development of tourism in the broadest sense,
- introducing new tourism products,
- renovating and modernising cultural sites for tourism purposes,
- developing and maintaining tourist routes,
- adjusting post-industrial sites and buildings for tourism purposes,
- urban revitalisation and reshaping urban policy for the development of tourism potential,
- developing tourist functions in rural areas, with particular emphasis on rural tourism, including agritourism and ecotourism, and the creation of traditional regional products.

It is also necessary to develop regular cooperation of MST with heads of regional governments, in the field of involvement of the tourism sector and businesses in the economic development of the regions. An important factor for the development of tourism will also be to ensure funding possibilities for regional-scale tourist projects within the financial instruments available for such initiatives, e.g. the JEREMIE and JESSICA instruments that offer refundable funding.

Fig. 12. Organisation of the *TDP 2020* implementation



The process of *TDP 2020* management organisation assumes the construction of an integrated tourism support system while ensuring the coordination of the tourism development process by the Ministry of Sport and Tourism in the role of the National Tourism Management Centre. Significant components of the support system for the tourism economy development should be:

- a partnership mechanism for the national-level government agencies,
- a horizontal, cross-cutting approach involving the implementation of measures to stimulate the development of tourism within national and regional programmes that integrate tourism as a leading socio-economic development factor for areas concerned. The horizontal approach contributes to the effective allocation of resources and the expansion of knowledge for the development of tourism-sector entities and organisations supporting tourism,
- support the focusing on the tourism development objectives, and integration of various sources of funding of tourism development measures,
- supporting cooperative relations between the tourism sector entities, with the aim to develop new tourism products and services,
- creating a framework for system solutions for investments in the tourism sector and tourism infrastructure in the public-private partnership formula.

So outlined, the tourism development system assumes the possibility of using the European Union regional development policy mechanisms for strengthening the development of tourism.

3. The monitoring and evaluation system

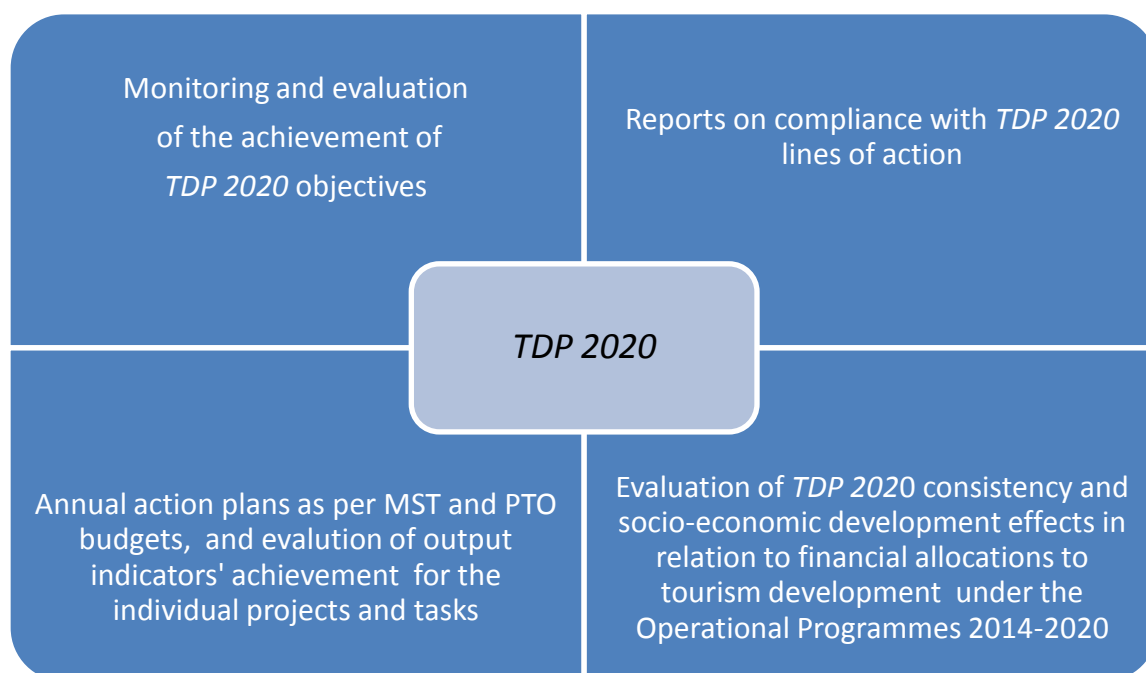
Monitoring

The monitoring system's objective is to examine the qualitative and quantitative progress in the *TDP 2020* implementation. Monitoring and evaluation aim at gathering, reporting and interpreting data that describes the progress and development of the tourism support system, as well as the effects of the public intervention within the *TDP*.

The *TDP 2020* monitoring system will be based e.g. on monitoring the progress in achieving the Programme's objectives and *TDP's* impact on the development of tourism in the country. The monitoring activity may also include periodic evaluation by experts. With regard to *TDP*, measures implemented to achieve the tourism development objectives will be evaluated against their effects. The system of monitoring the achievement of the *TDP 2020* main objective will be constructed based on the CSO and the EUROSTAT indicators. To each operational objective of *TDP*, specific indicators will be assigned, whose purpose is to monitor the progress in achieving the main objective.

Of greatest significance for the implementation of *TDP 2020* will be impact indicators reflecting the achievement of the vision and results of measures taken to support the development of tourism. The output indicators will be determined at the level of individual projects implemented with the use of funding under specific operational programmes.

Fig. 13. The *TDP 2020* monitoring and evaluation framework



Source: BDKM Grupa Doradcza Sp. z o.o. for MST, based on the guidelines of the Ministry of Infrastructure and Development, 2013

The monitoring of *TDP 2020* will be carried out by way of regular gathering of numerical data and other information on the progress in achieving the *TDP 2020* objectives. The main monitoring tools should include:

- comparative and thematic analyses at the strategic evaluation level,
- periodic reports illustrating the degree of achievement of the *TDP* individual objectives and results, and of the implementation of the individual tasks,
- planned modifications in the implementation of *TDP 2020*, indicating new lines of action in the field of tourism development.

It is assumed that the monitoring activities (measurements of the indicators) will be carried out in the following forms:

- on-going monitoring of the *TDP 2020* tasks' implementation – the assessment will be correlated with on-going reporting (assessing the achievement of the indicators versus the objectives)
- periodic analysis: for the *TDP* objectives - each year, on completion of the implementation of the MST annual financial plan covering tasks related to *TDP*; and for the operational objectives – in cycles, consistent with the availability of official statistics and reporting of entities involved in the implementation of *TDP 2020*.

In the context of monitoring the degree of achievement of the *TDP* implementation indicators, key issues will be the availability of statistical data and information, the conducting of surveys and the cooperation between the CSO and public administration entities.

Table 2. Overall achievement indicators of *TDP 2020* objectives

Strategic (general) objective achieved through operational objectives	Impact	Measure
Operational objective 1: To develop innovativeness, attractiveness and quality of tourist services and products, as an economic competitiveness factor	Development of new tourism products and services	The number of 3-star and 4-star certified tourist information points and centres
	The increase of domestic tourism and foreign inbound tourism to Poland	The number of new certificates awarded in the competition for Best Tourism Product
	The increase in the tourism sector receipts/inbound tourism expenditure	The number of domestic tourist trips of Poles
		Domestic travel expenditure of Poles
		The number of foreign tourist arrivals
		Foreign tourist expenditure in Poland
The tourism sector's contribution to GDP		
Operational objective 2: To strengthen social activity and entrepreneurship in the tourism sector and to increase the competence of human resources	The development of tourist services	The number of clusters in the tourism sector, established under the support programmes
		The number of entities cooperating in product consortia
Operational objective 3: To promote priority tourism products of the country and the regions, as well as their economic specialisations based on tourism	The development of smart specialization based on the tourism products and services used in the regions	The change in the number of recipients of information and promotion messages in the domestic and foreign markets, in relation to the base year (in%)
		The number of implemented promotion projects presenting the tourist attractiveness of Poland in foreign markets
Operational objective 4: To develop and modernize space for the development of tourism and tourist infrastructure while complying with the principles of sustainable development and environmental protection	The development of tourism and tourism-related infrastructure, for the overall development of tourism	The number of industrial heritage sites available to tourists
		The number of site revitalisation projects
		The length of new tourist routes

regulations	funded from the state budget (in km)
	The length of modernised tourist routes funded from the state budget (in km)

Table 3. Values of overall achievement indicators of TDP 2015-2020

Measure	Source of measure	2015	2016	2017	2018	2019	2020
The number of 3-star and 4-star certified tourist information points and centres	PTO	162	162	167	167	172	172
The number of new certificates awarded in the competition for Best Tourism product	PTO	7	7	7	7	7	7
The number of domestic tourist trips of Poles (in million)	MST	38.5	38.8	39.0	39.2	39.5	39.8
Domestic travel expenditure of Poles (in PLN billion)	MST	16.8	17.0	17.3	17.5	17.8	18.0
The number of foreign tourist arrivals (in million)	MST	16.2	16.8	17.2	17.6	17.8	18.0
Foreign tourist expenditure in Poland (in PLN billion)	MST	22.6	22.8	23.0	23.4	23.8	24.2
	MST	5.2	5.2	5.3	5.3	5.3	5.4
The tourism sector's contribution to GDP (in %)							
The number of clusters in the tourism sector, established under the support programmes	MST	78	78	80	80	82	82
The number of entities cooperating in product consortia	PTO	75	79	84	84	90	95
The change in the number of recipients of information and promotion messages in the domestic and foreign markets, in relation to the base year (in%) ¹⁰	PTO	0.5%	1.5%	2.5%	3.5%	4.6%	5.6%
The number of implemented promotion projects presenting the	PTO	850	850	850	850	850	850

¹⁰ The number of recipients of information and promotion messages covers marketing messages of all types (e.g. internet messages, information disseminated at trade shows, information disseminated in brochures published by the Polish Tourist Organisation)

tourist attractiveness of Poland in foreign markets ¹¹							
The number of industrial heritage sites available to tourists	acc. to MST, quoted after: the European Cultural Route ¹⁴	7	7	7	8	8	8
The number of site revitalisation projects	acc. to MST, quoted after: Portal Funduszy Europejskich; the competition <i>Poland Even More Beautiful</i> ¹⁵	73	73	75	75	77	77
The length of new tourist routes funded from the state budget (in km) ¹²	MST	1000	1000	1000	1000	1000	1000
The length of modernised tourist routes funded from the state budget (in km) ¹³	MST	5000	5000	5000	5000	5000	5000

Evaluation

The overall objective of the evaluation system is to improve the quality, effectiveness and cohesion of measures taken for the development of tourism. The evaluation objective will be achieved through:

- determining the extent to which the individual *TDP 2020* objectives have been achieved;
- identifying positive and negative factors affecting the implementation of the tourism development support measures,
- reviewing and assessing the measures carried out as part of the *TDP 2020* implementation,
- presenting conclusions regarding the possible need for *TDP 2020* amendment/revision.

In the process of the *TDP 2020* development and implementation, the following evaluation stages have been planned:

¹¹ The number of implemented promotion projects presenting the tourist attractiveness of Poland in foreign markets results from the calendar of the Polish Tourist Organisation; the number of such promotion projects is planned to be maintain at the current level

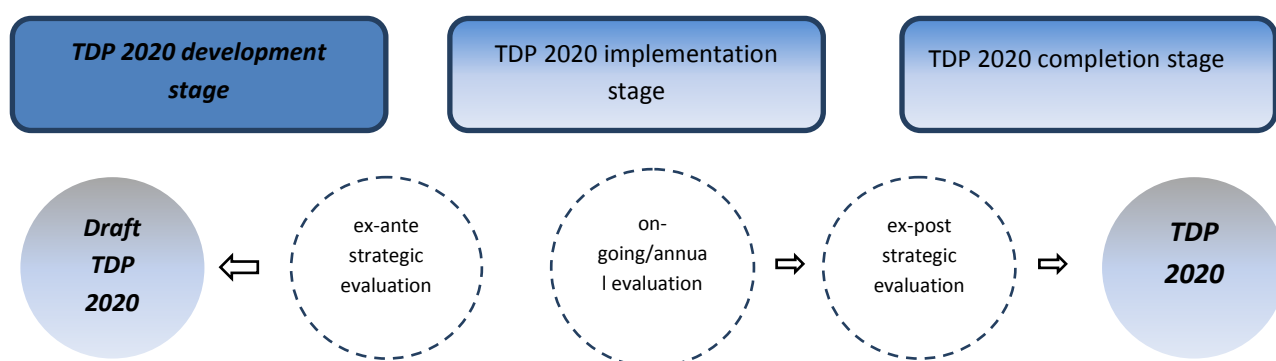
¹² The length of new tourist routes funded from the budget of the Ministry of Sport and Tourism

¹³ The length of modernised tourist routes funded from the budget of the Ministry of Sport and Tourism

¹⁴ The number of sites listed as parts of the European Cultural Route

¹⁵ The number of revitalisation projects that forwarded their applications to Portal Funduszy Europejskich [the European Funds Portal] for the competition *Poland Even More Beautiful*

Fig. 14. Evaluation of TDP 2020



Source: BDKM Grupa Doradcza Sp. z o.o. for MST, based on: *Concepts and Ideas - Monitoring and Evaluation in the Practice of European Cohesion Policy 2014+ - ERDF + CF*

Within the evaluation process, the following activities will be carried out:

- strategic evaluations – overall evaluation of the *TDP 2020* results,
- operational evaluations, to support the monitoring of the *TDP 2020* implementation; those will be on-going evaluations carried out by the Ministry of Sport and Tourism (as internal or external evaluations).

The *TDP 2020* evaluation process will cover the following activities:

- analyses and assessments,
- evaluation of the impact of legislation applicable to the tourism sector,
- task budgeting, also within the state budget item “*Tourism*”.

Given the proposed evaluation approach, the *TDP 2020* will be a systematic tool for managing the development of tourism. The *TDP 2020* document is of open nature which means that the changing socio-economic situation will be taken into account.

IX. IMPLEMENTATION FRAMEWORK

1. Tourism development support organisation

TDP 2020 is not a closed set of activities and solutions. The *Programme* is open to dialogue with partners from the tourism sector and the business community, including tourism enterprises. This will enable the document’s regular revision according to current economic situation, and its updating within the monitoring process, consequently allowing for its adjustment to the developmental challenges facing the tourism sector.

Of importance for the implementation of *TDP 2020* will be to identify the obstacles in all areas having a significant impact on the development of tourism.

Given the horizontal nature of tourism development policy and the diversity of the tourism sector stakeholders, a key factor in this process is the cooperation between the Ministry of Sport and Tourism and the organisations and stakeholders involved in the process of tourism development.

The key factors that condition the smooth implementation of *TDP 2020* include:

- strengthened cooperation between the Ministry of Sport and Tourism and: the Ministry of Infrastructure and Development, the Ministry of Economy, the Ministry of the Environment, the Ministry of Agriculture and Rural Development, the Ministry of Culture and National Heritage, the Ministry of Science and Higher Education, the Ministry of National Education, the Ministry of Labour and Social Policy, the Ministry of Health, as well as regional and local government entities and the tourism sector organisations.
- development of cooperation between the Ministry of Sport and Tourism and relevant public sector agencies and entities, i.e. PTO, RTOs, PARR, NRDC, PAIIZ and NFEPPM in the implementation of solutions and activities aimed at supporting tourism,
- creating partnerships between the central and regional levels and between the public and private sectors, including NGOs,
- development of innovations in the tourist sector, and appropriate use of the operational programmes co-financed by the EU for strengthening the tourism sector funding.

2. The National Tourism Management Centre (NTMC)

The Ministry of Sport and Tourism will hold the function of the National Tourism Management Centre (NTMC) and, in this role, will carry out additional tasks in the field of managing tourism development and coordinating the quality of tourist services. This will contribute to increasing the competitiveness of the country's tourism sector and to economic development. The main tasks of the Centre will be:

- to develop quality standards applicable to the provision of selected tourist services,
- to support the development of a tourist service certification system,
- to develop a system of strengthening professional competences of tourism leaders, tour operators and tourism enterprises' human resources.

The Ministry of Sport and Tourism's function of the National Tourism Management Centre will be conducive to better organisation of support provision to tourist services and tour operators' activities, which will positively impact the quality of tourist services.

3. Certification of tourism products and services

The strengthening of the national tourism quality management system should be achieved through the development of a product and service certification system for the tourism sector, and should

comply with applicable EU guidelines. According to the Services Directive¹⁶, in the case of the standardisation and certification process, consumer services are also covered, such as those in the field of tourism, including tour guides, leisure services, sports centres and amusement parks. The approach proposed in *TDP 2020* assumes the integration of the management systems, and the development of internal systems e.g. in the form of quality charters for specific tourist services or products. The development of new standards for tourism products and services is, according to the said directive, a basic requirement for service competitiveness. The organisation of the service quality management and certification system should be based on identifying specific requirements for individual types of tourist services.

The planned system should include, inter alia, the following elements of the tourism product and service certification:

- standardisation, i.e. identification, development and application of standards in line with the new EU guidelines contained in the relevant EU documents (including the Europe 2020 strategy). The standardisation will enable harmonised management of tourist service and tourism product quality. The standardisation will be carried out in line with the requirements of the EU directives and other legislation applicable to the tourism industry, according to the following organisational system: product/ service (activity); process; institution or cluster (certification at the national or regional level),
- implementation of corporate social responsibility (CSR) standards for tourism enterprises, tour operators and hotel service systems,
- reviewing and cataloguing the ISO standards for the tourism sector, based on e.g. ISO 9001 in tourist enterprises,
- determination of certification paths for the selected management levels, in compliance with the quality management system, e.g. within a system of contracts with institutional customers (hotels - airlines - travel agencies),
- a guidebook on the principles and criteria of applying PPP solutions in tourism projects, including, according to the EU regulations, a risk identification system and a PPP-project management system,
- development of a quality management system framework for tourism, including e.g.:
 - (a) a quality management system for the tourism sector, transposing the ISO management and environmental standards to tourist services and products,
 - (b) implementation of a system of service evaluation against social criteria (focused on customer evaluation and customer orientation),
 - (c) development of a classification system for accommodation establishments,
- development of a National Code of Good Practice in Tourism Management.

¹⁶ Directive 2006/123/EC of the European Parliament and of the Council of 12 December 2006 on services in the internal market [OJ L 376 of 27.12.2006]

Support to the development of certification and management systems for the tourism economy will bring about the following benefits for tourism development:

1. improved competitiveness of the tourism sector enterprises,
2. optimisation of costs and effects in all areas of tourist service management,
3. reduced expenditure related to complaints and to liability for insufficient service quality, damage to the environment and occupational diseases,
4. reduction of the number of operational procedures, manuals and provisions by simultaneous consideration of quality management, environmental management and occupational safety aspects.

4. The National Centre for Public-Private Partnership in Tourism

Appropriate management of the tourism sector investments and projects, including infrastructure investments in the public-private partnership (PPP) formula, is an important pillar of the tourism development support system.

The National Centre for Public-Private Partnership in Tourism will play a supporting role in the implementation of infrastructure investments with the participation of public and private partners. The centre will provide information and training on the legislative, institutional, financial and management requirements to be met by PPP projects in the tourism sector. It will also present good practice examples of such projects and determine the criteria for supporting such projects.

This will be done by evaluating and sharing good practices and providing information support in the process of planning and managing public-private partnership solutions in the tourism sector. The National Centre for Public-Private Partnership in Tourism will contribute to the development of best practices for tourism investments involving both private and social partners. The Centre will also be responsible for promoting the PPP model in tourism among regional governments that may implement such initiatives, and for cooperating with institutions and organisations involved in the PPP projects' development, e.g. the Institute for Public-Private Partnership.

The National Centre for Public-Private Partnership in Tourism is an essential component of the tourism development support system, responding to the European Commission recommendation expressed, inter alia, in the *Europe 2020* strategy and relating to the need for greater involvement of private partners in the development processes, and for larger engagement of private funds in the financing of projects co-financed from EU funds.

5. The Tourism Observatory

A key component of the tourism development management system will be the planned establishment, within the *TDP 2020*, of the national Tourism Observatory.

The Tourism Observatory will have, inter alia, R&D functions in the field of research and analysis supporting the development of the tourist sector. The Observatory is a necessary point on the map of the developed support system for tourism, tourist companies and other stakeholders in the sector. The establishment of the new analytical and research unit will enable the creation of new tourist services and products meeting the constantly changing trends in tourism. The main tasks implemented by the observatory as a tourism development support entity will include on-going monitoring of the tourism market, collection and processing of tourism-related data, development of profiled databases and analyses, and making them available, through an IT platform, to interested entities and individuals. There is also a need for analyses of competitive tourism products offered within the tourism sector. The collected data and analyses will constitute an integrated database and information system on the development trends in the tourism market. The Observatory will also provide access to demand-side and supply-side analyses for individual subsectors of tourism, and surveys relating to the demand for specific services in the tourist market. An additional function of the observatory will be to support tourism sector stakeholders in building strong consortia with the participation of R&D entities. The Observatory will also ensure the implementation of specific R&D tasks constituting essential components of innovation projects in the field of introducing new tourism products. This will additionally increase the ability of tourism sector entities and tourism development organisations to cooperate with research institutions operating in the field of tourism, and to develop their networks as scientific support to the tourism sector stakeholders and authorities. After the establishment of the Tourism Observatory, consideration will be given to the possibility to sharing its data through the central repository of information of the Ministry of Administration and Digitization.

6. The role of tourism sector organisations

In the implementation of tourism sector development measures, an important role will be played by the tourism sector organisations, in particular the Polish Tourist Organisation (PTO), the regional tourist organisations (RTOs) and Local Tourist Organisations (LTOs).

Broadening of the activity and cooperation of the PTO, RTOs and LTOs will be of particular importance for the involvement of the different actors in the development and promotion of Polish tourism by ensuring a consistent development framework for the tourist organisations.

Within the tourism development management system, the PTO may provide support to the implementation of new clustering activities in tourism. In addition, the PTO measures will be aimed at reinforcing the promotion of tourism products and services of the country and the strengthening of its tourist image and tourist brand.

RTOs may act, within a given ROP, as managers and intermediaries in supporting entrepreneurship and tourism-related measures in the field of urban policy, site revitalisation and activation of rural areas.

The role of the RTOs and LTOs will also be to stimulate structural solutions for the development of new services and products based on regional tourism specialisations.

In this area, *TDP 2020* will provide an operational tool for stronger involvement of local governments and private entities in the process of tourism development at the regional level.

The support at the regional level will be available to the tourism sector's businesses and clusters that will create regional tourism products, brands and services based on regional tourist attractions and resources.

In addition to supporting tourism projects within the ROPs, the Regional and Local Tourist Organisations in the individual regions should use the system of available refundable instruments, regional funds and innovation networks for co-financing projects of the tourism sector enterprises through projects or project consortia managed by the RTOs and LTOs.

Such projects shall provide a basis for the development of product chains involving local tourist businesses and organisations. This way, tourism will engage the resources and potentials of the local economy, thus involving its socio-economic resources and reinforcing its regional specialisations based on tourism. In addition, in rural areas, of use for developing agritourism products may be the new development formula based on local resources, including the activity of local groups and NGOs.

As regards the division of tourist organisations according to the national and regional levels, the Regional and Local Tourist Organisations should maintain their key role as operational and management entities in the processes of creating and developing specific tourist services and products within their regions.

The RTOs and LTOs may act as initiators of cooperative relationships established with the aim to ensure high quality tourism products and services able to sustain international competition by providing an attractive and high-quality tourist offer. This process will be carried out through regional focusing of efforts and earmarked support to entrepreneurship in the tourism sector.

The RTOs may integrate financial support to tourism by joining different types of support instruments; this can be done e.g. by acting as intermediary partners in investing the funds of the Regional Operational Programmes, for instance by integrating private entrepreneurs' capital in the funding of tourist services. This model of support to the development of tourism within the operational activities of RTOs and LTOs will also contribute to the improvement of qualifications of regional human resources for the needs of managing the tourism sector entities.

The RTOs and LTOs may impact the strengthening of tourism specialisations in the regions and be involved in the process of developing, organising and managing regional tourism products and brands. By extending their scopes of activity, those organisations may also undertake the process of supporting the tourism industry clusters, and of operational management of regional and local clusters built around tourism products and services. This will entail the inclusion in the tourism sector of new entities implementing tourist specializations or services based on the development potential of a given region.

The RTOs and LTOs, with the use of appropriate support tools, may offer to entrepreneurs and service providers the access to systemic tools for supporting the cooperation in the tourism sector, e.g. sales platforms and ordering systems.

Activities of the RTOs and LTOs will also result in the development of innovative products and services and the building of regional tourism networks.

7. Clustering in tourism

The objective of the cluster policy in Poland is to strengthen the innovation and competitiveness of the Polish economy through intensified cooperation, interaction and knowledge flows within clusters, and support provision to the development of strategic economic specialisations (key clusters).

The concept of territorial economic development based on clusters is provided for in the *Strategy for Innovation and Economic Efficiency* (SIEE) as an effective mechanism for concentrating resources and assets, and one of the best diagnosed ways of stimulating innovation and horizontal cooperation in the economy.

The Enterprise Development Programme until 2020 indicates activities for strengthening and developing clusters, including support to the development of clusters of key importance for the national economy (key national clusters, KNC).

The tourism sector and related areas of the economy and knowledge have a number of features advantageous for economic development. This allows the profiling and specialisation of cooperation chain links and the development of clusters in the field of tourism.

Cluster initiatives and consortia should be commonly established in tourism mainly for the implementation of joint projects competing for the customers and improving the quality of products supplied.

The advantages and opportunities for the partners are as follows:

- using the common knowledge and skills,
- sharing and increasing the marketing knowledge and competence,
- mutual availability of unused production capacities.

Among the other benefits of clustering there are also risk reduction¹⁷ and streamlining of operational activity thanks to knowledge gained from the cooperating entities. In the long term, clusters also have a positive impact on the economic development of the region and the country¹⁸.

A tourism cluster/ consortium is an active network gathering:

- tourism product suppliers,
- the supporting enterprises from other industries,
- tourist organisations,
- local authorities and governments,
- business environment organisations,

¹⁷ M. Bengtsson, S. Kock, "Coopetition" in *Business Networks – to Cooperate and Compete Simultaneously*, "Industrial Marketing Management" 29 (2000), p. 414.

¹⁸ Final Report of the Expert Group on Enterprise Clusters and Networks, European Commission, Enterprise DirectorateGeneral, Brussels 2003, p. 16.

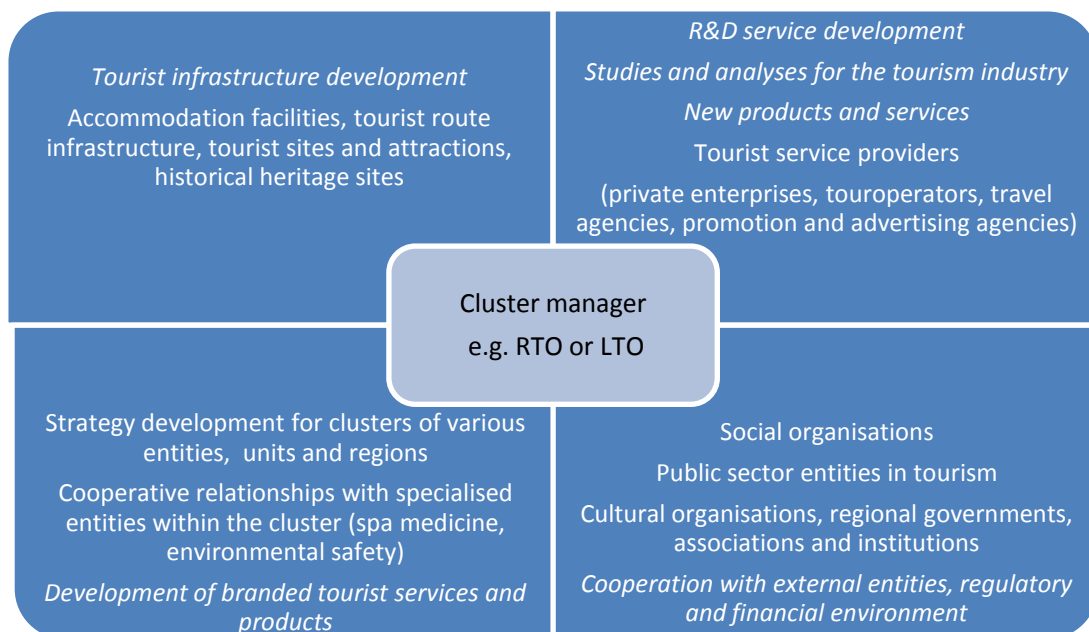
- educational and expert facilities (universities, R&D institutions)

cooperating with each other under a particular brand (branded tourism product) and, at the same time, competing with each other in the fields of quality, innovation and uniqueness of services offered.

Tourism development through cluster networking and supporting cooperation between entities may contribute to:

- more efficient use of tourism potential in the region,
- important organisational changes in tourism enterprises focused on the joint offers of their clusters,
- increased share of innovative products in the tourist offer of the country and regions,
- development of branded tourism products and attractions on the supra-regional and national scales,
- increased quality of the services and offers of tourist enterprises,
- improved ability to quickly and flexibly respond to changes taking place in the tourist market,
- winning new foreign markets for Polish tourism products, through international cooperation within tourism cluster networks.

Fig. 15. Potential areas of cooperation within a tourism cluster



Source: BDKM Grupa Doradcza Sp. z o.o. for MST, based on: *Clustering in the tourism industry*, Warsaw 2012

Among the main areas of cooperation within tourism clusters, there are inter alia:

- development of tourist infrastructure and guaranteed access to the cluster members' infrastructure,
- development of R&D services to be provided to the cluster members with the aim to develop innovative solutions,

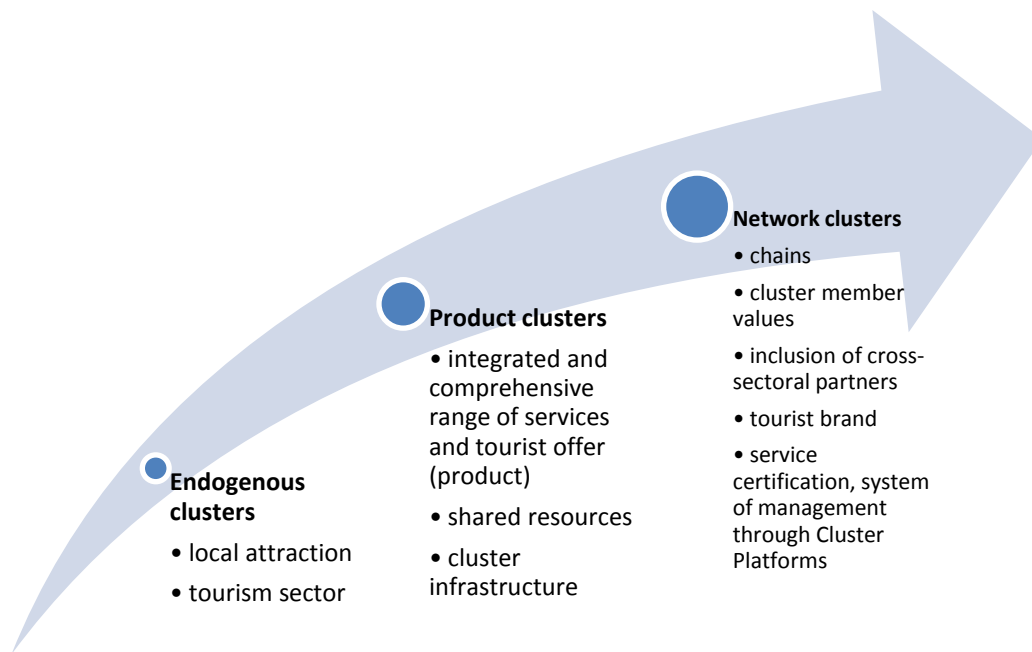
- development of branded tourist services and products,
- cooperation with the external environment, e.g. with regard to funding sources or cluster policy framework.

The development of the tourism economy will be possible through bottom-up cooperation between the various actors in the form of tourism clusters and cluster instruments. The cooperation should be aimed at developing new tourism products or offers. The cluster manager/operator coordinates the cluster's resources and, based on the cluster strategy, develops relationships with the partner entities and institutions. As part of integrating the cluster's resources, joint activities may be carried out e.g. in the field of promotion, sale, or branded tourism product development.

Support to the development of tourism industry clusters should be provided at two main levels: the regional level and the national level:

1. The regional level covers the implementation of regional instruments to stimulate the development of cooperative relationships focused on specific tourism products, regional products and tourist attractions. Regional clustering will cover e.g.:
 - strengthening the competences of regional cluster leaders as a result of the exchange of information, practices and management systems relating to cluster development,
 - increasing the access to financing instruments for cluster companies (e.g. local cluster funds),
 - development of services and products determining the competitive advantage of a given region.
2. The national level covers support provision by the Polish Tourist Organisation to the development of tourist clusters by:
 - raising awareness of the idea of clustering,
 - dissemination of information about clusters,
 - building confidence, willingness to cooperate, and dialogue,
 - facilitating contacts between the tourism industry stakeholders, with the aim to build tourism clusters.

Fig. 16. Cluster development in the tourism sector

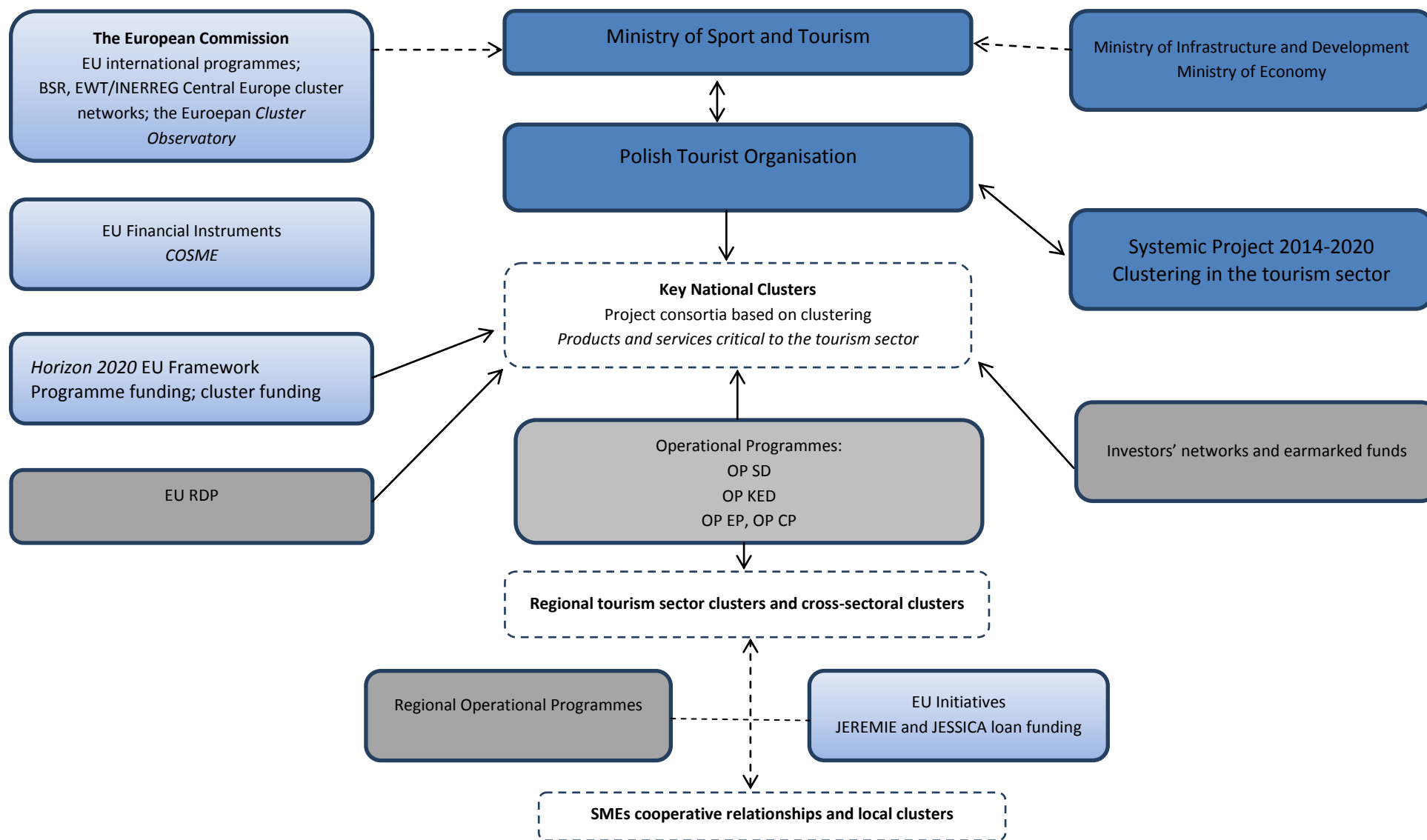


Source: BDKM Grupa Doradcza Sp. z o.o. for MST, based on: *The Evolution and Structure of Industrial Clusters in Japan*, the World Bank Institute, *The Cluster Initiative Greenbook*, 2009

According to the principles the *Europe 2020* strategy, based on sectoral and cross-sectoral cooperation, cooperative relations may be developed at the regional level, which, over time, strengthen their interregional cooperation potential and may thus be allocated financial support also at the national level. Such financing will be available e.g. under the Smart Development Operational Programme 2014-2020, as support to the so-called Key National Clusters (KNC) and the implementation within those clusters of new cooperative products, services and tools.

The cluster system organisation, together with the available options of supporting clusters in the tourism sector until 2020, is shown in the figure below.

Fig. 17. Support to cluster development in tourism until 2020



X. IMPLEMENTATION FINANCING AND FUNDING INSTRUMENTS

1. The main funding instruments for tourism development

Tasks related to the implementation of the *Tourism Development Programme 2020* will be financed by individual entities within their budgets and will not generate additional burden for the public finance sector and, in particular, for the state budget and the regional and local budgets. The funding of tasks recommended to all entities involved in the development of tourism will take place within their own assets, without additional allocations from the state budget and regional and local government budgets.

TDP 2020 will be financed based on the following two sources of funding:

1. National sources
2. Sources coming from the allocations to Poland within the EU financial perspective 2014-2020

Re. 1

Within the national funding, the following tasks will be implemented:

- tasks of the Ministry of Sport and Tourism (state budget item no. 40 "Tourism: MST and PTO"), and of other ministries and their agencies undertaking measures for the development of tourism,
- regional and local governments at all levels,
- business entities and their organisations,
- scientific institutions and business support organisations,
- regional and local tourist organisations,
- non-governmental organisations, foundations and social partners.

Funds allocated by the Ministry of Sport and Tourism and the Polish Tourist Organisation for the development of tourism, within the state budget item no. 40 "Tourism", amount to approximately PLN 50 million per year. The amount depends on the size of the annual allocation determined by the Minister of Finance in the annual budget. It is estimated that in 2015-2020 the amount allocated to tourism development will not exceed PLN 300 million.

In 2015-2020, regional and local governments intend to allocate financial resources e.g. to: the promotion of tourism in the country and abroad; study visits for journalists and tour operators; publications; grants for NGOs; support to regional tourist organisations; tourism product development, the construction of cycling routes; and other infrastructure-related tasks in the field of tourism.

Re. 2

The support for tourism will also be provided with the use of the European Union funds, under the 9 National Operational Programmes, 16 Regional Operational Programmes and other programmes.

The funding sources originating from the allocations to Poland within the EU multiannual financial framework for 2014-2020 are: the European Regional Development Fund, the European Social Fund, the Cohesion Fund and the European Agricultural Fund for Rural Development. The tasks will be co-financed within both refundable instruments and non-refundable support measures.

Tourism development activities will, in a large part, be implemented within the regional programmes, and will include e.g.:

- supporting the competitiveness of SMEs,
- regional image strengthening,
- supporting the development and promotion of new tourism products,
- making use of landscape values,
- revitalisation and modernisation of cultural sites for tourism purposes,
- development and maintenance of tourist routes,
- agritourism,
- adaptation of cultural and industrial sites for tourism purposes.

Within the currently ending financial perspective, the Polish Tourist Organisation will have allocated over PLN 10 million for the implementation of tasks under Measure 6.3 *Promotion of tourist attractiveness of Poland* of the Operational Programme Innovative Economy (OP IE), and PLN 2.5 million for the implementation, within Technical Assistance, of Measure 6.4 of the Operational Programme Innovative Economy (OP IE) under the following projects: *Management support*, action 9.1; *Equipment supply for institutions*, action 9.2 and *Information and promotion*, action 9.3, as well as the provision of Technical Assistance as an instrument to support the *Creation and development of tourism products of supra-regional significance* under the Operational Programme Eastern Poland 2015-2020.

For the period 2015-2020, as in the previous programming period, the regions have considered tourism an important element of their development, which has been reflected in all the Regional Operational Programmes (ROP).

Expenditure of regional and local budgets will be significantly dependent on the scope of the projects' co-funding under the European Territorial Cooperation programmes and the European Neighbourhood Instrument. The sources of tourism funding within the ETC are planned to include, in particular: INTERREG VA Brandenburg-Poland 2014-2020, INTERREG VA Poland-Saxony 2014-2020, The Czech Republic-Poland 2014-2020, Programme Poland-Slovakia 2014-2020, the Baltic Sea Region Cooperation Programme 2014-2020, and the Transnational Cooperation Programme Central Europe for 2014-2020.

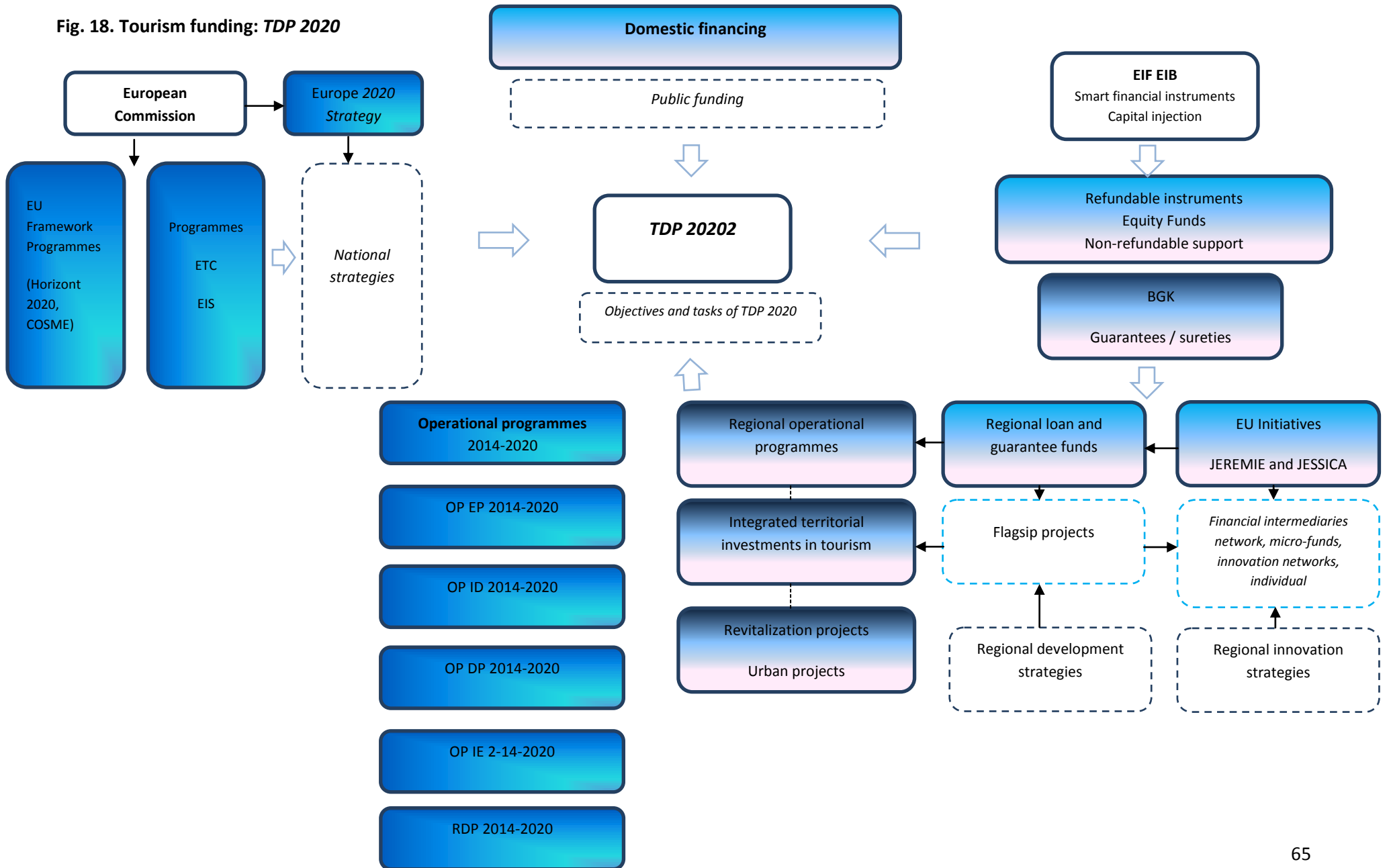
Estimated total expenditure of Polish regional and local governments on the co-financing of the EU projects in 2015-2020 will be PLN 440 million, with the overall value of the EU projects amounting to approx. PLN 3 billion.

In addition, the funding of tourism-related tasks is envisaged under the EU framework programmes such as COSME (Programme for the Competitiveness of Enterprises and Small and Medium-Sized Enterprises) and Horizon 2020 (the EU Framework Programme for Research and Innovation).

Under the COSME programme, it is assumed e.g. to improve the conditions for the establishment and development of enterprises, inter alia through supporting individual sectors, with particular emphasis on tourism.

The Horizon 2020 Framework Programme is the EU's largest programme ever in the field of research and innovation.

Fig. 18. Tourism funding: TDP 2020



The tourism funding system provided for in the *TDP 2020* is a coherent and complementary mechanism of tourism funding from national funds and the European Union funds, in the framework of individual operational programmes for the period 2014-2020 (both in the form of non-refundable support and refundable instruments). The tourism funding model set out in *TDP 2020* is consistent with the guidelines contained in the draft EC Regulations 2014-2020 and with the operational programmes, regulations on state aid, and state budget projections.

The *TDP 2020* funding system covers the following funds:

- state budget funds managed by the Ministry of Sport and Tourism,
- EU structural funds available under the Regional Operational Programmes,
- EU structural funds available under the National Operational Programmes 2014-2020 (e.g. OP Smart Development, OP Infrastructure and Environment, OP Digital Poland, OP Eastern Poland).
- funds available under the Rural Development Programme 2014-2020,
- funds available under international cooperation programmes carried out within the European Territorial Cooperation and the European Neighbourhood Instrument
- funds of entities and partners in the implementation of *TDP 2020*, including private funds, primarily funds of state aid beneficiaries', constituting their own contribution to projects within consortia,
- funds of regional entities and tourism-related organisations, e.g. budgets of Regional Tourist Organisations and regional governments,
- National (central) budget appropriations included in the budgets of certain ministries and agencies/entities appointed or authorised to distribute budgetary funds for statutory tasks in the area of tourism development; including: earmarked funds at the disposal of agencies appointed to carry out specific tasks,
- other funds, for instance available within the EU framework programmes (e.g. Horizon 2020), as well as refundable funds available within the EU initiatives JEREMIE and JESSICA or sub-regional initiatives e.g. JOSEFIN.

Moreover, the *Programme's* implementation will require a greater participation of public administration entities (at the central, regional and local levels) in the tourism funding system. The available operational programmes and funds will also make it possible to engage financial resources of specific EU projects and agencies allowed to finance activities for specific areas of *TDP*, for instance R&D (supported by NRDC) or the European Territorial Cooperation programmes' allocations to interregional and cross-border tourism projects. The large inflow of funds within the EU 2014-2020 programmes and initiatives will enable support for tourism development, through funding different tasks from different (public and private) sources. It will also allow for diversification of support types (non-refundable grants and refundable instruments), and for using equity financing from available Venture Capital (VC) funds, Private Equity funds and Business Angels Networks (BAN).

In general, the implementation of tourism funding within *TDP 2020* has been divided into two categories, depending on the types of available financial instruments:

- non-refundable support available to public administration entities, tourism organisations, associations, regional agencies, non-profit partners (e.g. foundations),

local governments and, to a lesser extent, directly to entrepreneurs. In the last case, funds made available to public entities and falling within the scope of state aid will be supplemented by private funds (beneficiary's own contribution),

- refundable instruments, addressed primarily to the tourism sector enterprises. Those instruments include guarantees, loans and sureties (e.g. within the existing surety and guarantee instruments, and regional loan funds available to businesses from all sectors), as well as capital injection (e.g. in the form of shares in newly formed companies, or equity shares in investments in the tourism sector, coming from VC funds or Business Angels Networks - BAN).

The division of financial instruments for tourism development, proposed in *TDP 2020*, is consistent with the *Europe 2020* strategy and is a proposal that needs to be determined at the stage of developing detailed criteria of support.

The general division of funding instruments for tourism development under *TDP 2020*, presented in Table 3, corresponds to the individual implementation stages of tourism projects.

Table 4. Proposed division of funding instruments for tourism development 2014-2020

FUNDING INSTRUMENTS depending on stage of tourism investment implementation		
Development and promotion of new tourism products and services	Investing in tourism infrastructure; purchase of fixed assets within tourism sector projects	Investing in, and implementing new services and innovative products in the tourism sector
NON-REFUNDABLE SUPPORT		REFUNDABLE INSTRUMENTS AND EQUITY INSTRUMENTS
PARP funds	funds of: OP SD, OP IE, OP DP, OP EP, ROPs	BGK bank funds
funds of: OP SD OP DP	PTO funds	NCF funds loan funds surety funds EP funds
	MSHE, ME, MAD funds	
	regional government funds – RTOs, local government funds	VC BAN

Source: BDKM Grupa Doradcza Sp. z o.o. for MST

The introduction of new funding instruments for tourism development projects is in line with the requirement to build financial partnerships through the combination of public and private capital, which is recommended by the *Europe 2020* strategy. It leads to a greater efficiency of financing with the participation of EU interventions in the field of developing development of tourism products and tourism-based economy.

One of the objectives of *TDP 2020* is to increase the access of enterprises, service providers, tour operators and tourism-supporting institutions to entrepreneurship funding mechanisms. This is particularly important for the tourism sector's SMEs for which there are instruments earmarked for creating new tourism products and services, developing multilayer enterprise cooperation chains, and the participation of R&D institutions in research on innovative products and services. Such

projects may receive funding both in the form of non-refundable support (including EU funds for research and development) and refundable instruments or equity instruments available at the stage of investment and of new tourism product and service promotion. The greater share of refundable instruments in financing tourism development projects will contribute to increasing the range, flexibility and efficiency of the support. This, however, requires the implementation of new financial engineering mechanisms supplementing the existing forms and types of financing the sector's businesses and organisations as contractors of specific tasks or projects. Appropriate solutions should be included in the area of partnership in order to allow for combining different sources of funding (including private ones) in financing public sector projects for tourism development.

Regional and local government units will implement *TDP 2020* under the ROP and possibly from their own funds for infrastructure investments and promotional activities at the regional level.

The proposed system of *TDP 2020* funding is correlated with the adopted objectives and tasks of the *Programme*. The specific objectives of the implementation of *TDP 2020* take into account the adopted thematic objectives set out in Article 9 of the draft Regulation of the European Parliament and of the Council laying down common provisions on the European Regional Development Fund, the European Social Fund, the Cohesion Fund, the European Agricultural Fund for Rural Development [...] of 06.10.2011. At the same, consistency has been ensured of *TDP 2020* funding with the assumptions of the Ministry of Infrastructure and Development concerning the programming and implementation in Poland of structural funds for 2014-2020, divided into individual operational programmes.

The following table indicates the *TDP 2020* funding sources for the Programme's specific objectives and for the individual categories of entities implementing the Programme.

Table 5. Sources of tourism funding within TDP 2020

N o.	TDP 2020 objective	Tasks	Possible scope of support	Sources of funding	Implementing entities and partners	Type of support
1.	Operational objective 1: To develop innovativeness, attractiveness and quality of tourist services and products, as an economic competitiveness factor	<p>1.1. To promote innovation and eco-innovation in tourism and tourist services.</p> <p>1.2. To use modern instruments for financing tourism and innovative enterprises in the sector.</p> <p>1.3. To use the Tourism Observatory-based R&D results in developing innovative tourism products and stimulating inter-sectoral cooperation for the development of the tourism economy and R&D for the tourism sector.</p> <p>1.4. To use intellectual property protection rights in developing solutions for the tourism sector and innovative tourism products</p> <p>1.5. To build regulatory, institutional and administrative efficiency for the development of tourism, including substantial support for entrepreneurs and associations in the tourism sector.</p>	<p>Support for the development of innovative services in the tourism sector</p> <p>The development of investment activity of enterprises, including in the tourism sector.</p> <p>Support for R&D activities of enterprises in the tourism sector.</p> <p>The Tourism Observatory.</p> <p>Research and analysis for the tourism sector.</p> <p>Development of innovation in tourism.</p> <p>Improving the competitiveness of SMEs in the tourism sector.</p>	<p>State budget, regional and local government budgets</p> <p>OP Smart Development</p> <p>ROPs</p> <p>OP Eastern Poland</p> <p>Regional Operational Programmes</p> <p>EU framework programmes for Research and Innovation - Horizon 2020</p> <p>EU Framework Programme CIP/ COSME</p> <p>NCRD research programmes</p> <p>Refundable instruments and equity instruments for the new period, e.g. NCF, de minimis guarantees, loans and sureties</p> <p>PPP</p> <p>Venture capital funds</p> <p>Business Angels Networks</p>	<p>Minister responsible for tourism, national-level institutions and ministries implementing measures for tourism;</p> <p>other competent ministers, regional and local governments</p> <p>Regional and local tourist organisations, NGOs, enterprises</p> <p>Polish Tourist Organisation (PTO)</p> <p>Polish Agency for Enterprise Development (PARP)</p> <p>Ministry of Economy</p> <p>European Commission</p> <p>The National Centre for Research and Development (NCRD)</p> <p>Research entities</p> <p>Financial institutions</p> <p>Bank Gospodarstwa Krajowego (BGK)</p> <p>Loan and guarantee funds</p> <p>The National Capital Fund (NCF)</p>	<p>Non-refundable support</p> <p>Refundable instruments</p>

				Special purpose vehicles (SPVs) Regional sub-funds, e.g. the Baltic Investment Fund (BIF)	Venture Capital (VC) Private Equity (PE) Business Angels Networks (BAN)	Equity instruments
2.	Operational objective 2: To strengthen social activity and entrepreneurship in the tourism sector and to increase the competence of human resources in tourism enterprise management.	<p>2.1. To take measures to create a friendly regulatory environment.</p> <p>2.2. To support and develop certification and management systems for the tourism sector.</p> <p>2.3. To include the tourism sector in the Integrated Qualification System.</p> <p>2.4. To support the development of social tourism and sightseeing tourism including, in particular, the participation of children and youth, large families, senior persons and persons people with disabilities in domestic tourism.</p> <p>2.5. To support clustering in tourism and to promote the cooperation and links and partnerships involving the tourism sector organisations for the development of tourism in the regions and in the country.</p> <p>2.6. To engage local, regional and Euro-region communities in the development of regional tourism economy products and services.</p> <p>2.7. To increase the competences of human resources with the participation of sectoral partners, RTOs, LTOs and other organisations and enterprises from the tourism sector.</p>	<p>Creating legislative solutions conducive to the development of tourism.</p> <p>The National Tourism Management Centre (NTMC). Supporting the development of certification systems. A more transparent system of education, comparable to the European system.</p> <p>Social policy measures in the tourism sector.</p> <p>Clustering in tourism and support to bottom-up development of cooperative relations in tourism. Training aimed at developing personnel competences in tourism. Clustering and technological platforms.</p> <p>Training, workshops, seminars - acquiring new knowledge, exchange of experience.</p>	<p>State budget</p> <p>State budget, and regional and local government budgets</p> <p>State budget; applicants for individual qualifications</p> <p>State budget</p> <p>OP SD, OP EP, ROPs</p> <p>European Agricultural Fund for Rural Development</p> <p>OP CP</p>	<p>Minister responsible for tourism; other competent ministers; MST, PTO, tourism industry organisations</p> <p>MST, the tourism industry</p> <p>MST, tourist organisations</p> <p>MST, cooperating institutions, PTO, competent ministers, regional and local governments</p> <p>Regional and local tourist organisations, NGOS, tourism industry enterprises</p> <p>Clusters</p> <p>Business environment organisations (BEO)</p>	Non-refundable support
3.	Operational objective 3: To promote priority	3.1. To promote regional tourism products and regional tourist	New services and tools for tourism development.	State budget, and regional and local	Minister responsible for tourism, national-level	

	<p>tourism products of the country and the regions, as well as their economic specializations based on tourism.</p>	<p>specializations.</p> <p>3.2. To use technology tools and instruments for improving the quality of e-information systems and services in the tourism sector, as well as advanced electronic management systems for the development of tourism.</p> <p>3.3. To develop a variety of instruments to support the promotion and export of tourism sector services and products, tourism enterprises and sectors related to the development of tourism.</p> <p>3.4. To support the promotion of tourism and initiatives related to its development, e.g. in the fields of cultural heritage and recreation.</p>	<p>ICT in the tourism sector.</p>	<p>government budgets</p> <p>OP Smart Development</p> <p>OP Digital Poland (OP PC)</p> <p>OP Eastern Poland</p>	<p>institutions and ministries implementing measures for tourism; other competent ministers, regional and local governments</p> <p>Regional and local tourist organisations, NGOs, enterprises</p> <p>Regional Development Agencies (RDA)</p> <p>PTO</p> <p>Polish Agency for Enterprise Development (PARP)</p> <p>Ministry of Economy Polish Information and Foreign Investment Agency (PAIIZ)</p> <p>Ministry of Economy's programme for export of products rich in intellectual property NRDC JTI GO GLOBAL Green EVO</p> <p>Funds of EU framework programmes for R&D e.g. Horizon 2020</p> <p>Guarantees and loan commitments relating to export</p> <p>Loans guaranteed by EU and</p>	<p>Non-refundable support</p> <p>Refundable instruments</p>
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					BGK	
4.	Operational objective 4: To develop and modernize space for the development of tourism and tourist infrastructure while complying with the principles of sustainable development and environmental protection regulations.	4.1. To support investment into the tourism sector within projects focused on revitalization and development of urban and rural areas and the creation of new services. 4.2. To support activities for the development of tourism infrastructure.	PPP Centre for Tourism. The protection and promotion of natural and cultural heritage to promote tourism. Development of industrial and post-industrial land and sites for promoting tourism. The use of cultural, environmental and tourist potentials of rural areas, and the involvement of local communities, for accelerating local economic development, and increasing the residents' income from non-agricultural activities.	State budget EU initiatives JEREMIE and JESSICA Integrated Territorial Investments - ROP Territorial Policy The urban revitalisation programme ROP Operational Programme Infrastructure and Environment Priority Axis VIII The National Fund for Environmental Protection and Water Management (NFEPWM) and Regional FEPWMs RDP OP Eastern Poland	Minister of Sport and Tourism Regional and local governments Landscape parks Tourist organisations National parks State Forest Administration NGOs	Non-refundable support Loans under the EU initiative JESSICA

Source: BDKM Grupa Doradcza Sp. z o.o. for MST

The funding sources indicated in Table 5 and earmarked for activities aimed at developing a modern tourism economy include a variety of support instruments that should be adjusted to a given project, its scope and development stage, and to the needs of the tourism sector enterprises.

In the period until 2020, new groups of support instruments will appear, including:

- non-refundable support for R&D activities (including the funding of the research stage of the companies' operation),
- a system of refundable financial instruments (including the purchase of modern technologies and innovative services),
- venture capital funds,
- support to new enterprises (start-ups) provided within earmarked funds,
- instruments facilitating investment in SMEs (including business angels networks).

Non-refundable support to R&D activities

The funding of the R&D stage will be a basic form of support to entrepreneurs in the area of innovation. It will contribute to the development of innovative products, services and technologies based on the use of knowledge results. The financing of such activities of entrepreneurs in the tourism sector will increase the level of competitiveness of the regional economy provided with the modern services and tourist products. In the 2014-2020 perspective, an increase should be provided of allocations to the research stage or innovative processes that require cooperation between business and science. Assistance in this area should offer non-refundable support for the R&D stage and support the engagement of enterprises' funds in the development stage and the implementation of new or improved tourism products or services. Such support may be allocated from the operational programmes or national programmes by NCRD and PARP.

Refundable instruments

In the new 2014-2020 perspective, the funding of the tourism sector initiatives may be focused on the introduction of refundable instruments (e.g. preferential loans) that reduce the risk on the entrepreneur's side, related to the introduction of new services and innovative organisational, marketing and promotion solutions in the implementation of tourist products.

The tourism sector entrepreneurs may use loan-and-guarantee instruments and loan instruments available to all sectors of the economy. Attention should be paid to measures aimed at developing a system of guarantees and sureties for micro, small and medium-sized enterprises. The current surety-and-guarantee system is based on the provisions of the Act of 8 May 1997 on sureties and guarantees granted by the State Treasury and certain legal entities (Dz.U. of 2012, item 657, as amended) and provisions of the government programme *Supporting entrepreneurship through guarantees and sureties of Bank Gospodarstwa Krajowego*. The sureties and guarantees are granted by Bank Gospodarstwa Krajowego (the products include sureties, guarantees, de minimis guarantees, re-guarantees), and by regional and local guarantee funds. Moreover, entrepreneurs may use a network of regional and local loan funds that are independent of bank products and offer products such as loans to SMEs and start-ups.

In the EU's new financial perspective 2014-2020, entrepreneurs will continue to use the above-mentioned instruments that will create a new surety-and-guarantee system based, inter alia, on EU

funds of the Regional Operational Programmes and the Operational Programme Smart Development. Those instruments will also be available to tourist enterprises.

Venture capital funds

Funds of this type are necessary for the development of new innovative entities at their seed stage. They may be an instrument supporting companies incubated in industrial or technology parks, or tourism entities offering e.g. new e-services or applications for innovative tourism products and services. The potential users of the venture capital support are enterprises from the SME sector, with a high potential for growth and innovation, as well as newly emerging businesses. Venture capital funds (VC) will be supplemented by subsidy instruments providing support to innovative investment projects and start-ups in the tourism industry.

Support to emerging enterprises (start-ups)

Specific earmarked funds established to support start-ups provide a particularly useful instruments for supporting the tourism-sector enterprises at their incubation stage. The instrument would be addressed primarily to emerging companies that have no sufficient creditworthiness allowing for using a loan or a guarantee as their activity is based on an innovative concept, idea or service. Support to emerging businesses may also include institutional support provided by business incubators. Other aspects include direct capital investment in the emerging entities, or support, e.g. in the form of loans, to the establishment of enterprises in the tourism sector. Support for the incubation of innovative enterprises should have a multidimensional nature: from the availability of infrastructure, through counselling and mentoring related to the establishment of a tourism business (including the available instruments of support, particularly financial support), to the provision of funding (seed funding) and of other services necessary for a new business. It is also possible to consider non-refundable support for the participation in international projects within the EU framework programmes, which will foster networking and clustering in the tourism sector.

Instruments for start-ups should be addressed to specific user categories and intended for specific purposes, e.g. idea refinement or development of innovative tourism services and products.

The above solutions in the field of support instruments for the tourism sector entities will make up a system of complementary and mutually reinforcing instruments, accompanying the tourism development plan. The system will include a range of support instruments available from various operational programmes and various other sources, and will be focused on meeting the objective of increasing the competitiveness of the tourist economy.

XI. SOCIAL AND ECONOMIC BENEFITS OF *TDP 2020* IMPLEMENTATION

The *Tourism Development Programme 2020* strongly reflects the EU priorities indicated in the *Europe 2020* strategy, e.g. the tourism sector innovation as part of developing an economy based on knowledge and innovation; sustainable development solutions in the tourism sector, and the inclusion of development activities integrating specific groups of entities in the overall economic

system in order to ensure sustainable development based on the regional specialisations, on the effectiveness of the tourism economy and on branded regional and national tourism products.

Effective support to tourism fosters the generation of economic growth. Tourism development should be characterised by the activation of regional potentials and regional specialisations based on tourism and related sectors' services. Support to tourism translates into better spatial management and sustainable development of areas. Another benefit of supporting tourism development is the achievement of large-scale synergies between the development of economic, cultural, and recreation functions and the development of infrastructure and space for economic and social activity.

The *Tourism Development Programme 2020* focuses its support developing the tourism sector and directing it towards the creation of competitive national and regional tourism products and tourist brands that have a strong basis for further development. The programme also foresees a growth in the tourism sector's innovative services thanks to the possibility to use various operational programmes at both national and regional levels.

Activities in the area of support to domestic and inbound tourism will contribute to strengthening a number of factors that impact the improvement of the country's socio-economic situation in many areas of economic and social life.

TDP 2020 is focused on areas directly related to the implementation of new services and innovations in tourist service organisation systems, the promotion of Polish products, and the strengthening of economic cooperation. This will contribute to raising the competitiveness of the economy, based on modern high-quality products and services involving the use of e-service systems and networking of the industry's entities. The tourism sector, as a result of the grassroots support to cluster development, will stimulate regional activity with the participation of social and industrial organisations. In addition to economic benefits for businesses and tour operators as partners in clusters and cooperative relations (in the form of newly created products and services, promotion and marketing) and, ultimately, an increase their exports, the support to tourism in the proposed form will foster the development of social capital by increasing the competences and skills of the sector's human resources.

The development of human resources is essential for further development of tourism and for building Poland's image while developing international cooperation within the modern tourist economy.

Among the benefits of the *TDP 2020* implementation will also be an increase in the regional and local activity, based on specialisations developed around regional tourist attractions and tourism products. In this regard, *TDP 2020* will contribute to increasing the knowledge about the development of new regional services and products aiding the development of regional tourism economy or constituting its integral parts.

TDP 2020 also envisages an increase of the quality of tourist offer through partnership cooperation and effective management of European Union funds, with the participation of public institutions and private entities. This efficiency will be reflected not only in the creation and development of new tourism products and regional tourism specialisations, but also the focus on achieving economic and

social objectives as a result of targeted spending of European funds earmarked for the development of tourism in the period 2014-2020.

Moreover, the measures planned in *TDP 2020* will enable the development of employment in the service sector, including through ensuring a higher level of knowledge and management skills.

In connection with the development of new services and the creation of integrated service offers in the area of tourism, the implementation of *TDP 2020* will activate regional entities and institutions in the tourism sector. *TDP* will also contribute to the strengthening of professional competences required in the labour market and the development of modern human resources. Tourism is one of the few sectors with forecasted high growth of employment and clearly expected development of new processes and products integrating a number of specialized services, such as those using ICT, e-services, communication technologies and newly established service centres for tourist sector entities.

Benefits for the economy will also occur in the form of promoting pro-environmental and pro-efficiency behaviours in the economy and services and, consequently, in the development of products and services characterized by high environmental and social standards and high quality.

Those elements are essential for increasing exports of tourism services and offers. Within the tourism sector's cooperation, significantly large groups of companies, in particular SMEs, relatively quickly establish international contacts in the field of business activity.

The partnership cooperation on many levels, envisaged in *TDP 2020* in the field of managing the implementation of projects and initiatives in the tourism sector, will allow an increase in social capital through the creation by the tourism sector of multi-stakeholder sectoral partnerships, organisations and enterprises (including at regional level), fostering the development of economic specializations involving the development of tourism-related services.

A social benefit of *TDP 2020* implementation will also be the stimulation (based on creating local products) of social activity of local organisations and groups focused on specific tourism products or services or local tourist routes. This will translate into reduced exclusion of people and social groups. Development of local tourist attractions is a process advantageous for local communities; it enables the creation of tourist functions as a developmental factor for individual areas, involving activation of rural areas or areas underused in terms of local service provision. Tourism will have a positive impact on the development of rural areas and will stimulate economic activity of local communities. Tourism also generates an inflow of capital to territories a result of investment in tourism-related infrastructure.

The creation of tourism products based on the development of cultural, business, active, health and rural tourism will be an important element of economic recovery of individual areas. It will also contribute to the extension of the tourist season through, e.g., adjustment of industrial sites for tourism purposes, and creation of jobs in services related to availability of tourist attractions.

The development of tourism generates activity and creativity among numerous target groups. Tourism development programmes in both urban and rural areas present measures addressed e.g. to entrepreneurs, NGOs, tourist organisations, public institutions, regional and local governments and research and education institutions promoting new fields of education in the area of tourist services.

In this way, the implementation of *TDP 2020* will also contribute to the implementation of solutions based on marketing, product, environmental and social innovations.

Tourism is a sector encouraging the establishment of consortia with the participation of partners from the SME and science sectors and social organisations. This increases the profitability of tourist service provision by generating new tourism offers, also outside the tourist season, making use of regional and local tourist potentials. In this way, the support to tourism contributes to building economic attractiveness of entire regions. In addition to increasing tourist traffic in a given area, tourism support also brings an increase in investors' interest, influences the development of local entrepreneurship and improves the educational offer.

The development of clustering in tourism will serve the purpose of strengthening this sector of the economy. As a result of the *TDP 2020* implementation, continued promotion of the country's attractiveness in other countries, and extended offer of the Polish tourism sector on international markets and the domestic market should also be expected.

The implementation of *TDP 2020* will find expression also in the process of increased support to tourism enterprises by providing them with up-to-date information, surveys on development trends in the sector, promotion of clusters and bringing together the currently fragmented offer of tourism businesses into a single, high-quality local, regional or cross-regional product.

XII. FINAL RECOMMENDATIONS

With regard to the constructed system of support to tourism development until 2020, the following key aspects conditioning the process of developing the country's tourism economy should be considered:

1. Until 2020, the development of tourism will be an important factor boosting economic and social development of the country.
2. Until 2020, tourism will constitute a significant component of development policy and territorial policies, influencing the level of development of individual regions.
3. The development of tourism should focus on areas directly related to implementing new services and innovations in tourist service organisation systems, developing and promoting Polish branded tourism products, and enhancing economic cooperation.
4. The implemented solutions aimed at supporting tourism should include both institutional instruments and financial instruments.
5. Support to the development of tourism until 2020 will be of cross-cutting and horizontal nature, and will integrate European Union funds at the national and regional levels.
6. It is desirable to implement various forms of supporting entrepreneurship and innovation among the tourism sector companies.

7. It is necessary to focus the support on innovation of tourism enterprises and to ensure territorial focus by supporting specific functional areas of integrated tourism projects (e.g. the development of regional products or rural tourism products, adjustment of industrial sites and facilities for tourism purposes, and development of tourist attractions based on cultural offers or natural values of individual regions). This will contribute to strengthening the tourism product priority areas.
8. In economic terms, the funding of regional measures for the development of tourism should be allocated to enterprises that meet the criteria of a given economic or regional specialization based on the development of tourism.
9. The process of providing support to tourism sector entities in the new programming period 2014-2020 should to a larger extent stimulate tourist service projects characterized by innovative solutions, implemented in partnership with the R&D sector and private entities and focused on the creation of new tourism products, brands and e-services.
10. It is required to develop a system of financial support in the form of financial engineering, including complementary support instruments for tourism entities, such as equity funds (risk funds and seed capital funds), and to use public-private partnership mechanisms in the development of tourism infrastructure and in financing R&D projects.
11. Support provision to the tourism sector at the regional level should take into account the promotion of cooperative relations, tourism clusters and project consortia involving R&D institutions.

XIII. SUMMARY

Tourism is an important sector of the Polish economy. The contribution of the tourism economy to Poland's GDP remains at the level of 5-6%. The sector employs approximately 760 thousand people (4.7% of the total workforce), of which approximately 170-200 thousand are employed in the accommodation and catering services. However, the country's tourism potential is not fully used.

The tourism economy may significantly contribute to improving the economic, territorial and social cohesion of Poland. Tourism is a factor that contributes to economic diversification and generates demand for highly-skilled human resources, innovative services, modern management tools (including Information and Communication Technologies - ICT) and research and analysis projects supporting sustainable economic development based on tourism. All this creates new possibilities of approaching tourism development as a part of regional policy, indispensable for strengthening the competitiveness of individual territories.

With a view to more effective use of Poland's tourism potential and strengthening its role in socio-economic development of the country and its regions, it seems appropriate, therefore, to develop a proactive and comprehensive programme of tourism development, constituting a part of the overall development policy and coordinated by the Ministry of Sport and Tourism. The programme will make it possible to reduce the fragmentation of the tourism market by adopting an integrated approach to supporting the tourism economy. This will be achieved through focusing on specific tourism products

and services, both in urban and rural areas. The programme will enhance innovativeness and creativity of the tourism sector by stronger involvement of representatives of the industry (in particular, SMEs), local government units, and tourist sector associations and organisations. In this modern approach, priority will be given to tourism policy instruments and solutions that foster employment growth and facilitate cooperation between businesses and their environment based on a network model of sharing economic resources and strengthening regional growth potentials. The programme sets a new framework for the development and support of tourism as a part of Poland's modern national economy.

Objectives of the Tourism Development Programme until 2020 (TDP 2020)

The main objective of the Tourism Development Programme until 2020 (TDP 2020) is:

to promote the development of competitive and innovative tourism through supporting the tourism sector enterprises, organisations, institutions and initiatives, while respecting the principles of sustainable development.

So understood, the main objective is closely linked to the achievement of the NDS 2020 objectives and related development strategies, by taking into account global challenges and development trends (innovation, service modernity, the involvement of science in the tourist innovation development process, sustainable development).

The main objective will be achieved through four operational objectives. For each of them, tasks have been indicated whose implementation will contribute to achieving the *TDP 2020* objectives.

Operational objective 1: To develop innovativeness, attractiveness and quality of tourist services and products, as an economic competitiveness factor;

Operational objective 2: To strengthen social activity and entrepreneurship in the tourism sector and to increase the competence of human resources;

Operational objective 3: To promote priority tourism products of the country and the regions, as well as their economic specialisations based on tourism;

Operational objective 4: To develop and modernize space for the development of tourism and tourist infrastructure while complying with the principles of sustainable development and environmental protection regulations.

The *Programme* management system is based on the coordination and cooperation of national, regional and local institutions. The institutions and entities involved in the tourism management system need to have access to effective support tools and instruments (institutional, financial and legislative ones). As a principle, according to *TDP 2020* the tourism sector development measures will be coordinated by the Ministry of Sport and Tourism, which will contribute to strengthening the tourism development management system. For the effectiveness of this process, it will be appropriate for the Ministry of Sport and Tourism to hold the role of the National Tourism Management Centre, mainly due to the cross-cutting and horizontal nature of the tourism economy development and its links with other development areas (e.g. entrepreneurship, innovation, regional development, urban development and rural development policies).

The process of managing the development of tourism until 2020 requires the consideration of both European policy challenges and solutions at the national and regional levels. The implementation of the *TDP 2020* tourism policy framework aimed at economic development should lead to an increase in economic and social activity of the partners.

The key factors that condition the smooth implementation of *TDP 2020* include:

- strengthened cooperation between the Ministry of Sport and Tourism and: the Ministry of Infrastructure and Development, the Ministry of Economy, the Ministry of the Environment, the Ministry of Agriculture and Rural Development, the Ministry of Culture and National Heritage, the Ministry of Science and Higher Education, the Ministry of National Education, the Ministry of Labour and Social Policy, the Ministry of Health, as well as regional and local government entities and the tourism sector organisations.
- development of cooperation between the Ministry of Sport and Tourism and relevant public sector agencies and entities, i.e. PTO, RTOs, PARP, NRDC, PAIIZ and NFEPWM in the implementation of solutions and activities aimed at supporting tourism,
- creating partnerships between the central and regional levels and between the public and private sectors, including NGOs,
- development of innovations in the tourist sector, and appropriate use of the operational programmes co-financed by the EU for strengthening the tourism sector funding.

Implementation of the Tourism Development Programme until 2020

The objectives of *TDP 2020* are consistent with the broader objectives of the European Union's cohesion policy for the period 2014–2020. The Programme's objectives are in line with the key challenges of the "*Europe 2020. A strategy for smart, sustainable and inclusive growth*".

The system of support for tourism development, set out in the *Programme*, defines the proposed tools and instruments for supporting tourism. The tourism industry will play a significant role in building a competitive and sustainable economy in the 2014-2020 perspective, based on the tourism sector's development potential as well as the growing internal demand, increasing quality of tourist services and offer, and the country's and the regions' geographical location encouraging investment in the tourism sector.

The National Tourism Management Centre (NTMC)

The role of the National Tourism Management Centre (NTMC) will be held by the Ministry of Sport and Tourism and will be to strengthen the management of tourism development and the system of quality and certification of tourist services. This will contribute to increasing the competitiveness of the country's tourism sector and to economic development. The main tasks of the Centre will be:

- to develop quality standards applicable to the provision of selected tourist services,
- to support the development of a tourist service certification system,
- to develop a system of strengthening professional competences of tourism leaders, tour operators and tourism enterprises' human resources.

The National Centre for Public-Private Partnership in Tourism

Appropriate management of investments and projects in the tourism sector, including infrastructure projects in the PPP formula, is an important pillar of the support system for tourism development.

The PPP Centre in the Ministry of Sport and Tourism will contribute to the development of good practices in the field of tourism investments with the participation of private and social partners. With regard to public-private partnership (PPP), under *TDP 2020* the Ministry of Sport and Tourism may provide e.g. consulting and information support to entities and local governments intending to implement investment projects in the PPP formula. The Centre will also be responsible for promoting the PPP model in tourism among regional governments that may implement such initiatives, and for cooperating with institutions and organisations involved in the PPP projects' development.

The Tourism Observatory

The Tourism Observatory will have, inter alia, the function of a research and development institution conducting surveys and analyses for the needs of the tourism sector development. The Observatory is a necessary point on the map of the developed support system for tourism, tourist companies and other stakeholders in the sector. The Observatory will be a part of the Polish Tourist Organisation.

The role of tourism sector organisations

The development of activities and cooperation of tourism sector organisations, in particular the Polish Tourist Organisation and the Regional and Local Tourism Organisations, will be an important element in the process of mobilising different stakeholders to develop tourism, by ensuring a consistent development system for tourism organisations.

As regards the division of tourist organisations according to the national and regional levels, pursuant e.g. to the Act on the Polish Tourist Organisation, the Regional and Local Tourist Organisations should maintain their key role as operational and management entities in the processes of creating and developing specific tourist services and products within their regions.

The tourism sector and related areas of the economy and knowledge have a number of features advantageous for economic development. This allows the profiling and specialisation of cooperation chain links and the development of clusters in the field of tourism.

The development of tourism through promoting the establishment of cluster networks and stakeholder cooperation will contribute to more effective use of the region's tourism potential, will introduce significant organisational changes in tourist enterprises, focused on joint cluster offers, and will contribute to increasing the share of innovative products in the tourist offer of the country and the regions.

Clustering in the tourism sector will result in the creation of strong tourism product priority areas and improved quality of tourist services. Clusters will contribute to building the competitive advantage of the country's tourism economy.

For ensuring the effectiveness of support for the development of tourism within *TDP 2020*, of key significance will be measures resulting in the efficiency of the system of financial support for the tourism sector with the use of both national funding and European Union structural funds for the period 2014-2020.

Of importance will also be the use of special purpose repayable instruments enabling mobilization of private company activities, and the use of funding made available by the tourism sector investment funding networks. The greater share of refundable instruments in financing tourism development projects will contribute to increasing the range, flexibility and efficiency of the support.

This, however, requires the implementation of new financial engineering mechanisms supplementing the existing forms and types of financing the sector's businesses and organisations as contractors of specific tasks or projects. Appropriate solutions should be included in the area of partnership in order to allow for combining different sources of funding (including private ones) in financing public sector projects for tourism development.

The *Tourism Development Programme 2020* strongly reflects the EU priorities indicated in the *Europe 2020* strategy, e.g. the tourism sector innovation as part of developing an economy based on knowledge and innovation; sustainable development solutions in the tourism sector, and the inclusion of development activities integrating specific groups of entities in the overall economic system in order to ensure sustainable development based on the regional specialisations, on the effectiveness of the tourism economy and on branded regional and national tourism products.

Effective support to tourism fosters the generation of economic growth. Tourism development should be characterised by the activation of regional potentials and regional specialisations based on tourism and related sectors' services. Support to tourism translates into better spatial management and sustainable development of areas. Another benefit of supporting tourism development is the achievement of large-scale synergies between the development of economic, cultural, and recreation functions and the development of infrastructure and space for economic and social activity.

The *Tourism Development Programme 2020* focuses its support on developing the tourism sector and directing it towards the creation of competitive national and regional tourism products and priority area products that have a strong basis for further development. The programme also foresees a growth in the tourism sector's innovative services thanks to the construction of new support mechanisms (a coherent system of tourism development management) and territorial and thematic focusing of the provided support. The system integrates tourism development support measures to improve the efficiency and competitiveness of the economy, which will contribute to improving the country's economic and social situation.

TDP 2020 is focused on areas directly related to the implementation of new services and innovations in tourist service organisation systems, the promotion of Polish products, and the strengthening of economic cooperation. This will contribute to raising the competitiveness of the economy, based on modern high-quality products and services involving the use of e-service systems and networking of the industry's entities. The tourism sector, as a result of the support and management systems planned within *TDP 2020*, will develop conditions for new forms of cooperation, including the promotion of clustering and the stimulation of regional activity with the participation of social and industrial organisations. In addition to economic benefits for businesses and tour operators as

partners in clusters and cooperative relations (in the form of newly created products and services, promotion and marketing) and, ultimately, an increase their exports, the support to tourism in the proposed form will foster the development of social capital by increasing the competences and skills of the sector's human resources, and developing effective tourism project management systems.

With regard to the constructed system of support to tourism development until 2020, the following key aspects conditioning the process of developing the country's tourism economy should be considered:

1. The development of tourism will be an important factor boosting economic and social development of the country.
2. Tourism will constitute a significant component of development policy and territorial policies, influencing the level of development of individual regions.
3. The development of tourism should focus primarily on areas directly related to implementing new services and innovations, developing tourist product priority areas, promoting Polish tourism products, and enhancing economic cooperation.
4. The implemented solutions aimed at supporting tourism should include both institutional instruments and financial instruments.
5. It is desirable to implement various forms of supporting entrepreneurship and innovation among the tourism sector companies.
6. It is necessary to focus the support on innovation of tourism enterprises and to ensure territorial focus by supporting specific functional areas of integrated tourism projects (e.g. the development of regional products or rural tourism products, adjustment of industrial sites and facilities for tourism purposes, and development of tourist attractions based on cultural offers or natural values of individual regions). This will contribute to strengthening the tourism product priority areas.
7. The process of providing support to tourism sector entities should to a larger extent stimulate tourist service projects characterized by innovative solutions, implemented in partnership with the R&D sector and private entities and focused on the creation of new tourism products, brands and e-services.
8. Support provision to the tourism sector at the regional level should take into account the promotion of cooperative relations, tourism clusters and project consortia involving R&D institutions.

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LIST OF ABBREVIATIONS

BAN – Business Angels Network

R&D – Research and Development

R+D+I – Research, Development and Innovation

CIP – Competitiveness and Innovation Framework Programme

CTT – Center for Technology Transfer

ERDF – European Regional Development Fund

ESF – European Social Fund

EAFRD – European Agricultural Fund for Rural Development

EIB – European Investment Bank

EIF – European Investment Fund

EUROSTAT – Statistical Office of the European Union located in Luxembourg

GUS – Główny Urząd Statystyczny (Central Statistical Office)

ICT – Information and Communication Technologies

IEE – Intelligent Energy Europe

ICT – Internet Communication Technology

SFI – Smart Financial Instruments

BEO – business environment organisations

R&LGU – local/ regional government units

EC – European Commission

NCF – National Capital Fund

KNC – Key National Clusters

LTO – Local Tourist Organisation

MID – Ministry of Infrastructure and Development

MSHE– Ministry of Science and Higher Education

SME – small and medium enterprises

MST – Ministry of Sport and Tourism

NCRD – National Centre for Research and Development)

NFEPWM– National Fund for Environmental Protection and Water Management

NGOs –non-governmental organizations

OECD –Organization for Economic Co-operation and Development

RES – renewable energy sources

PARP – Polska Agencja Rozwoju Przedsiębiorczości (Polish Agency for Enterprise Development)

GDP – Gross domestic product

OP SD – Operational Programme Smart Development 2014–2020

OP DP – Operational Programme Digital Poland for 2014-2020

OP DKE – Operational Programme Development of Knowledge Education 2014-2020

OP EP – Operational Programme Eastern Poland 2014-2020

OP IE – Operational Programme Infrastructure and Environment

EDP – Enterprises Development Programme until 2020

PTO – Polish Tourist Organisation

RTO – Regional Tourist Organisation

TDP – Tourism Development Programme until 2020

ROP – Regional Operational Programme

SIEE – Strategy for Innovation and Economic Efficiency “Dynamic Poland 2020”

EU – European Union

UNWTO –United Nations World Tourism Organization

VC –Venture Capital