

Assessment of National Tourism Development Strategy - Poland -

This analyse was prepared on the base on Assessment Criteria and Methodology for a National Sustainable Tourism Development Strategy of CEEweb for Biodiversity (Sustainable Tourism Working Group).

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1. Introduction to Polish National Tourism Strategy assessment

Directions for Tourism Development until 2015 is the document of Ministry of Sport and Tourism which defines the priority areas and directions for tourism development. It follows the Project of Tourism Development Strategy in Poland for years 2007-2013 adopted in 2007.

The primary objective of *Directions...* is: creation of legal, institutional, financial and human resources conditions which will foster social – economic development of tourism and will improve competitiveness of regions and country while preserving its cultural and natural values.

Basic premise of the document states (in I. Introduction) that with relevant approach, tourist function development will support the preservation of traditional values and sustainable development.

The main goals for tourism development in Poland are:

- a) increase of economic significance of tourism in economy development,
- b) increase of environmental quality and life quality of inhabitants,
- c) cooperation and integration for tourism and its environment in social, special and economic dimension.

Mission of the *Directions...* states as follows:

- tourism will be developed in synergy with other sectors (which contribute to GPD),
- tourism will expose and effectively profit from potential of the country (in particular natural and cultural heritage),
- Poland will constitute an attractive direction for national and international tourism with effective tourism industry and modern, competitive and high quality products and services.

Directions for Tourism Development until 2015 will be implemented at two levels¹:

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

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

The strategy is formulated by National Tourism Administration (NTA) which is Ministry of Sport and Tourism in case of Poland.

2. National Tourism Strategy as a public planning document

The Polish Ministry of Sport and Tourism published the information of the document which is available on the public site:

<http://www.msport.gov.pl/strategie-turystyka/524-Kierunki-rozwoju-turystyki-do-2-15-roku?retpag=/strategie-turystyka>

The download material consists of three items:

- a) Kierunki rozwoju turystyki do 2015 roku (Polish version of the *Directions...*)
- b) Streszczenie - wersja angielska [57 KB] (Summary in English)
- c) Directions for tourism development until 2015 (Directions... in English)

4. Sustainable tourism development foundations in the document

Each priority area was previously studied through SWOT analysis. First priority area – A highly competitive tourist product, for example, focuses on strengths related to natural resources and identified social trends and changes in consumption in tourism which lead to active and health based tourism offer. Weaknesses are related to lack of high quality in tourism offer with infrastructure deficiencies (insufficient environment protection infrastructure included) and lack of coordination between local and regional policies affecting the development of the tourist offer. Degradation of natural resources, especially those of environmental value, including those which are a part of the Natura 2000 network or national system of protected areas was identified as threads.

These issues are especially important for sustainable development of tourism in Poland. Therefore it is vital that an indication and stimulator of the attractiveness and competitiveness of Polish tourist products is the development of an environmentally friendly brand as an integral part of the tourist image of Poland. However there is no need to make distinction between environmentally friendly tourism and sustainable tourism in the document nomenclature.

Additionally actions for this priority suggest monitoring of ecological effects of created products. Moreover, in the document it is stated that creating tourist products should involve limited, wherever possible, transport which will contribute to reduction of natural resources usage.²

Operational objective I.1 – Creating and developing competitive tourist products is to be achieved by training and educational programs for local and regional

¹ See Annex 1.

² See also Resource Cap Coalition initiated by CEEweb for Biodiversity

tourist animators, elaboration of integrated strategies such as promotion, distribution, management.

Operational objective 1.2 – Developing tourism infrastructure states that localisation and the technology employed should take into account the conditions resulting from the need to protect the environment. The development of infrastructure will concern trans-border and interregional cooperation in specialist tourism infrastructure.

Furthermore, it is underlined that well prepared infrastructure may channel the tourism movement in such a way so that it would contribute to the protection of natural and cultural resources and prolong the tourist season. Actions will support infrastructure which helps in protection of locations where the tourist pressure is especially strong.

The third objective aims for several important effects as far as creation of integrated products is concerned: improving cooperation between areas, service providers, and entities shaping the tourist offer, developing assessment criteria for the integrated branded tourist products from the perspective of the pressure on the environment (e.g. efficient energy and resource consumption, including land consumption, scale of pressure on various environmental formations covered by various types of protection, scale of pollution or interference), defining rules that make reference to sustainable development, which are to be followed when establishing cooperation between various areas, establishing cooperation between environmental protection services.

In Operational objective 1.4 improvement of the terms of entrepreneurship in tourism will be based on cooperation which would lead to elaboration of planning documents including protection of natural and cultural resources in local scale down to commune's level.

The sustainable development is set as key assumption for development of different type of tourism in Operational objective 1.5 Health tourism is linked here with other sectors responsible for health policy such as employment creation in health service and encouraging qualified medical staff to work in the country. On the other hand, recognition of the role of urban tourism and supporting the development of tourism in post-industrial facilities may contribute to better allocation of tourism movement. The diversification of tourism activities with the most potential in Poland included rural tourism (under condition that it will preserve original cultural character and natural environment), pilgrim tourism and business tourism.

In this objective the sustainability in tourism is claimed as condition for tourism further development as well as its contribution to the cultural and natural heritage protection. Nevertheless, there should be more emphasis on better competitiveness of the tourism products in the European market if sustainable tourism is implemented. Monitoring of these actions is necessary (there should be linkage to the last chapter of the strategy).

PRIORITY AREA II concerns DEVELOPMENT OF HUMAN RESOURCES CONTRIBUTING TO TOURISM DEVELOPMENT. Role of both tourist staff and the tourists themselves also in creation of high quality tourism as well as proper understanding of products in sustainable tourism is underlined.

Professional training for tourism of employees and managers (Operational objective II.1) already employed in this sector, encompass issues related to dealing with special groups of tourists, in particular the disabled. The personnel needs be aware also of the restrictions imposed by the constitutional obligation of environmental protection, terms of this protection (legal, institutional, practical), sources of information on the current condition of the environment and benefits for tourism industry resulting from preservation of the natural environment in a proper condition.

All the same the impact of tourism stretches well beyond the market, as it affects people's attitudes, quality of social and human capital and the natural environment (Operational objective II.2). This recognition is very important for local communities as it gives the opportunities which are planned in operational activities such as:

- employment of people from other than tourism qualifications,
- support for tourist education of staff in local authorities (self-government, administration employees, local and regional tourism organizations, non-governmental organizations),
- leisure time animators for children.

The education will include protection of environment (with special enhancement of N2000 areas), elaboration of tourism development programs in communes, communities, tourist centers etc.).

Nevertheless, none type of tourism should be called *sustainable* as their impact on economic, social and natural environment depends on the local preconditions (grade of area protection, rural/urban environment etc.) (Operational Action II.1.4).

The needs of tourism industry in terms of human resources will be monitored under Operational objective II.3. (especially qualifications connecting ecology and tourism). This action involve proactive attitude of anticipating employers needs in training programs in order to boost the sustainable tourism development.

Next area covered by *Directions...* is the PRIORITY AREA III – MARKETING SUPPORT which aims to creation and development of a marketing system in tourism (especially improvement of tourist information system).³

There are two important issues raised here. First that the components of a tourist offer should send the message that it respects local cultural and environmental values and social traditions. Secondly, awareness of need for cooperation in the process of creation and commercialisation of products should be encouraged, even if it sometimes involves the cooperation of competing regions. Finally, the territorial marketing requires a long term vision.

PRIORITY AREA IV – SHAPING THE TOURIST SPACE is especially important for sustainable development in this strategy. This area describes sustainable tourism development as a great opportunity in SWOT analysis of the priority area.⁴

Operational objective IV.1 regards shaping the development of tourism so as to preserve and increase the value of tourist space. On the local level, tourist space is to be shaped on the basis of detailed analyses of tourist potential and in a close relation to ecological capacity of target areas such as: national parks, natural reserves, landscape parks and others and their protection zones. There rules of tourism utilization of each space are generally defined. The touristic space will be adjusted as well to the recommendations of Natura 2000 concept.

³ Assumptions regarding the marketing support for this area are compatible with the 'Assumptions regarding the *Strategy for the promotion of Polish economy 2007–2015*', whose priorities include an increase of incoming tourist traffic in Poland through, among others, promotion of Polish tourist products and development of a tourist information system.

⁴ Sustaining tourist attractiveness is here therefore dependant on the preservation of a widely understood spatial order in the following dimensions:

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

Furthermore, innovations and proecological infrastructure solutions in natural protected areas will be initiated and implemented in protected areas. During realisation of this objective, support will be granted to tourism-related projects carried out in accordance with Agenda 21.

Operational objective IV.1 supports also very important goal which are inter and supra local touristic initiatives which will allow to develop for example tourist trails. Areas which has potential for tourism such as post military, barrens and post industrial locations will be included in tourism development plans.

Actions under Operational objective IV.2 aim to develop pro-ecological transport connections especially various forms of collective transport (rail transport, enabling bicycle and pedestrian traffic in tourist areas). Increasing the accessibility should also be aimed at the improvement of quality and provide an equal access to tourist attractions to all target groups, including the disabled. Furthermore environmental impact report is to be involved in all actions under this objective.

SUMMERY

There are positive elements in the document that would benefit sustainable development of tourism in Poland, although rather declarative than concrete. The sustainable developments principles mentioned in the document are important followed by employment and job creation support and environmental management as well as creation of ecological awareness through tourism. The document has a chance to become potentially sustainable strategy for tourism development in Poland (score: P=61% in the evaluation table).

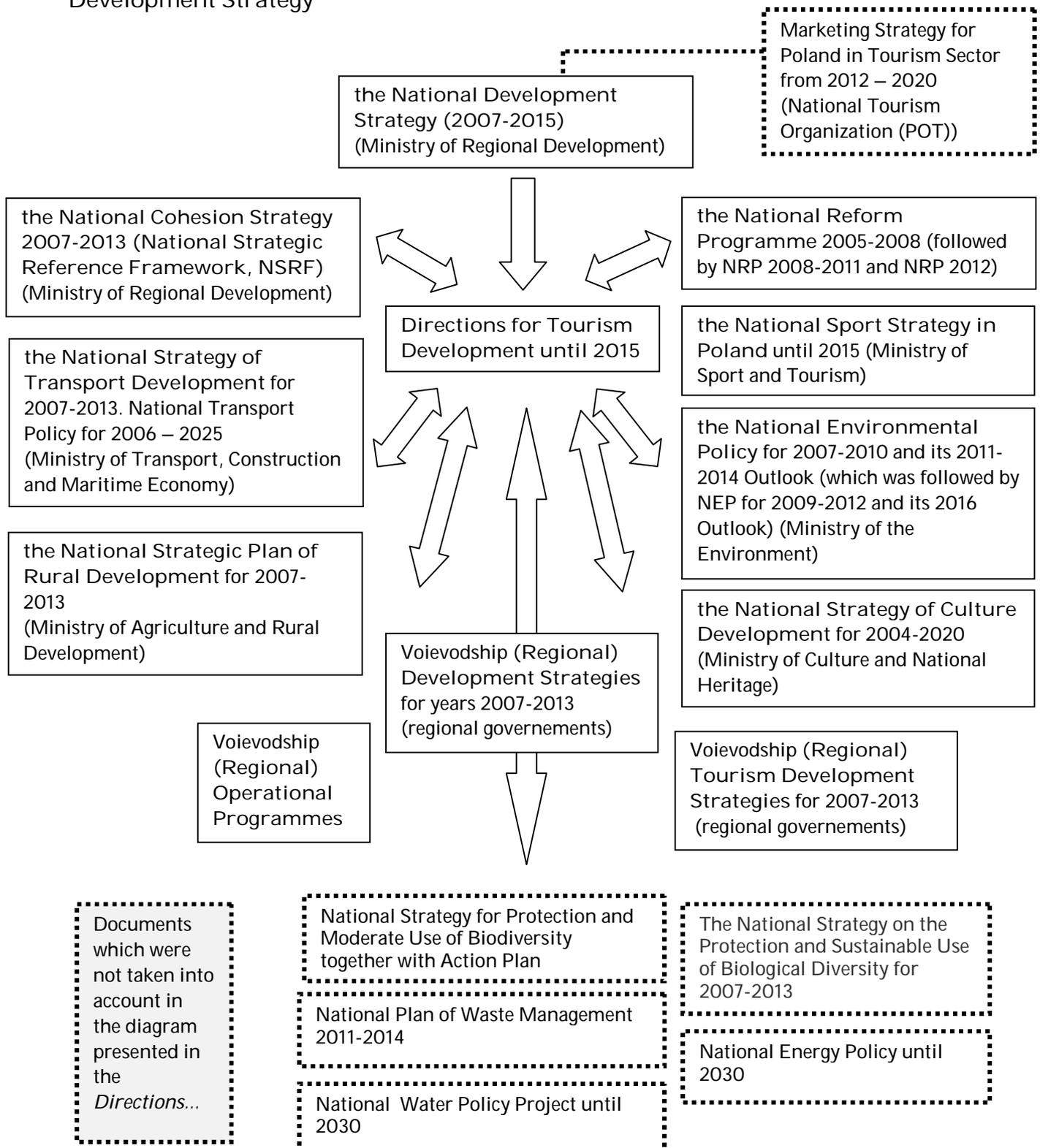
3. Assessment Criteria for National Tourism Development Strategies

The document basic information

Name of the main document representing tourism policy in the country	Years of implementation
Directions for Tourism Development until 2015 (institution responsible for implementation: Ministry of Sport and Tourism)	2007-2015
Names of the complementary planning documents and initiatives (linked to the other sectors for example such as in point no.9 in the evaluation table)	Years of implementation
- the National Development Strategy (2007-2015) (Ministry of Regional Development)	2007-2015
- the National Cohesion Strategy 2007-2013 (National Strategic Reference Framework, NSRF) (Ministry of Regional Development) The document is determined by the Lisbon Strategy and the Community Strategic Guidelines (CSG), it determines development activities to be undertaken by Poland in 2007-2013 in order to achieve sustained economic growth, improved competitiveness and the increase of employment, serves the purpose of providing assistance to regions and marginalised social groups, assistance in the restructuring of traditional economic sectors and problem regions, is prepared in co-operation with the European Commission as the guidelines for using Structural Funds and the Cohesion Fund, provides framework for the preparation of 16 operational programmes for 16 Polish regions (voivodeships).	2007-2013
- the National Reform Programme 2005-2008 (followed by NRP 2008-2011 and NRP 2012) (Ministry of Regional Development, implementation of priorities: Ministry of Economy, Ministry of Science and Higher Education, Ministry of Administration and Digitization) The NRP correlates the Polish developmental targets with the priorities identified in the Europe 2020 Strategy National Spatial Development Plan and provide the framework for national development management system. The program includes the development of Integrated Tourist Information System.	2005-2008
- the National Environmental Policy for 2007-2010 and its 2011-2014 Outlook (which was followed by NEP for 2009-2012 and its 2016 Outlook) (Ministry of the Environment) one of the most important documents in the field of environmental protection. Amongst the systemic objectives and tasks it covers such areas as the mobilisation of the market for environmental protection, including the partnership with the business.	2007-2010
- the National Strategic Plan of Rural Development for 2007-2013 (Ministry of Agriculture and Rural Development)	2007-2013

- the National Strategy of Transport Development for 2007-2013. National Transport Policy for 2006 – 2025 (Ministry of Transport, Construction and Maritime Economy)	2007-2013
- the National Strategy of Culture Development for 2004-2020 (Ministry of Culture and National Heritage)	2004-2020
- the National Sport Strategy in Poland until 2015 (Ministry of Sport and Tourism)	2007-2013
- Voievodship (Regional) Tourism Development Strategies for 2007-2013 (regional governements)	2007-2013
- Voievodship (Regional) Development Strategies for years 2007-2013 (regional governements)	
The documents' achievements and future projects	Years of implementation
- Marketing Strategy for Poland in Tourism Sector from 2008 – 2015 (National Tourism Organization (POT))	2008 – 2015
- Marketing Strategy for Poland in Tourism Sector from 2012 – 2020 (National Tourism Organization (POT))	2012 – 2020
- Creation of Interministerial Team for legislative initiatives in the government	2009 - 2012
- Information about the ralisation of statutory tasks of Interministerial Team for coordinating the tasks of the Government included in Directions for Tourism Development until 2015	2009, 2010 and 2011
- Financing of public services realized by non-public finance sector	2008-2013

Diagram – complementary strategies and documents for Polish Tourism Development Strategy



The evaluation table

Name of an indicator	Scores (S) and Weights (W)								
I Description of the document and elaboration process	$W_1 = 0.1$								
1. The documents representing tourism policy in the country	S = 3 if yes								
<ul style="list-style-type: none"> - general plan of social-economic development - sectoral plan (national tourism strategy) - operative plan for government actions and agendas - the strategy is published in an easy-to-read version which does not exceed 100 pages comprising major targets 	<table border="0"> <tr> <td style="vertical-align: top; padding-right: 10px;">S₁</td> <td style="vertical-align: top;">3</td> </tr> <tr> <td style="vertical-align: top; padding-right: 10px;">S₂</td> <td style="vertical-align: top;">0</td> </tr> <tr> <td style="vertical-align: top; padding-right: 10px;">S₃</td> <td style="vertical-align: top;">3</td> </tr> <tr> <td style="vertical-align: top; padding-right: 10px;">S₄</td> <td style="vertical-align: top;">0</td> </tr> </table> <p>Ad. S₁ National Development Strategy (2007-2015) mentions tourism as a chance for less industrialized regions of the country, employment generator, tourism is associated with quality of life, a part of service sector which needs to have a convenient conditions created first (infrastructure and transport) in order to be developed</p> <p>Ad. S₂ the document gives directions to different parts of government in tourism development and indicates distribution of EU funds rather than presents the proper strategic future for tourism without focusing mainly on particular events (like EURO 2012)</p> <p>Ad. S₄ the document comprises of 128 pages and does not represent the easy-to-read vision for all stakeholders as a sectorial strategy</p>	S ₁	3	S ₂	0	S ₃	3	S ₄	0
S ₁	3								
S ₂	0								
S ₃	3								
S ₄	0								
2. The National Tourism Development Strategy sets out clear priorities, goals, policies, objectives, interventions and expected results:	<p>S = 1 if just the long term vision (up to 10 years) is included</p> <p>S = 2 if sustainable tourism is included by enhancing issues where tourism can make a difference</p> <p>S = 3 if sustainable tourism and biodiversity protection is</p>								

	included	
- vision of national tourism policy	S ₅	3
- goals of national tourism policy	S ₆	3
- objectives of national tourism policy	S ₇	2
- operational measures/tasks	S ₈	3
- expected results/indicators	S ₉	2
- expected results (outcomes) of national tourism policy	S ₁₀	2
		<p>Ad. S₅ and S₆ the mission describes tourism as synergetic to other sectors and the respect to the natural and cultural resources as well as quality in tourism products</p> <p>Ad. S₇ the active role of the document in protection of natural and cultural resources is not mentioned nevertheless the IV priority objective: <i>Shaping the tourist area</i> is very valuable in regional development and long-term planning for tourism</p> <p>Ad. S₈ see point nr 4 in the introduction</p> <p>Ad. S₉ there is only one type of indicators mentioned (macroeconomic or monitoring of the influence on the environment but no specific indicators are presented and results are only macroeconomic results, p. 61 of English version)</p> <p>Ad. S₁₀ outcomes are presented in the form of general declaration (p.23 of English version)</p> <p>---</p> <p>In general <i>Vision</i> (named as mission) includes important for sustainable tourism promises: synergic with other goals important from the point of view of the development of a country and respect to the principles of sustainable development. Biodiversity protection is not mentioned</p>

	<p>(only in context of natural heritage). <i>The ultimate objective</i> emphasis retaining cultural and environmental values in socio-economic development of country and raising its competitiveness. There are two important issues raised in <i>guiding objectives</i>: (1) quality of life of Polish citizens and of the environment and (2) cooperation and integration to the benefit of tourism and tourism-related environments in social, spatial and economic aspects.</p>																
<p>3. Targets or norms are established by governments (in other strategic documents as well) considering areas such as:</p>	<p>S = 1 if the relevant planning document exists S = 2 if the tourism issues are included in the document S = 3 if the tourism issues and biodiversity protection is included S = 4 if there are targets set which influence tourism sector S = 5 if there are targets set which influence tourism sector and biodiversity protection</p>																
<ul style="list-style-type: none"> - land-use zoning - ecosystem functioning - biodiversity conservation and sustainable use - sustainable transport - green house gas reduction in the tourism industry - climate change adaptation and mitigation in destinations - waste reduction and management - poverty alleviation/mitigation 	<table border="0"> <tr><td>S₁₁</td><td>3</td></tr> <tr><td>S₁₂</td><td>2</td></tr> <tr><td>S₁₃</td><td>2</td></tr> <tr><td>S₁₄</td><td>2</td></tr> <tr><td>S₁₅</td><td>3</td></tr> <tr><td>S₁₆</td><td>3</td></tr> <tr><td>S₁₇</td><td>3</td></tr> <tr><td>S₁₈</td><td>2</td></tr> </table> <p>Ad. S₁₁ space management is one of sectors which tourism involves and as such is taken into account by the <i>Directions...</i> - the Operational Objective IV.1. focuses on utilisation of tourist space and zoning</p> <p>Ad. S₁₂ ecosystem services are mentioned among the assumptions of the document and carrying capacity of ecosystems are listed as one of the subjects for the scientific</p>	S ₁₁	3	S ₁₂	2	S ₁₃	2	S ₁₄	2	S ₁₅	3	S ₁₆	3	S ₁₇	3	S ₁₈	2
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	<p>research as support for decision making Ad. S₁₃ Operational Objective IV.1. – Shaping the development of tourism so as to preserve and increase the value of tourist space) only in the case of particularly valuable areas tourism should be dependent on environmental and biodiversity protection Ad. S₁₈ poverty mitigation is planned through redistribution of incomes through tourism (among sectors and industry and regions) and creation of jobs in tourism in the document</p> <p>---</p> <p><i>The National Environmental Policy</i> aims at improvement of National Environmental Monitoring System and meeting the EU requirements in the filed of air protection, waste reduction (<i>National Plan of Waste Management 2011-2014</i>) and climate protection which are defined in mentioned directives. <i>The National Transport Policy</i> includes fields relevant to tourism development but there is no clear correlation in he document.</p>	
<p>4. Strategy formulation process includes the following actions:</p>	<p>S = 1 if the information about the document formulation is available for stakeholders S = 2 if the stakeholders are invited to the meetings or other form of involvement into the formulation process S = 3 if the active contribution was accompanied by research on the type of tourism the stakeholders want to host</p>	
<ul style="list-style-type: none"> - baseline information is gathered on the basis of multi-stakeholder consultations - local communities are involved in the consultations and their active role in destination management is recognized 	<p>S₁₉ S₂₀</p>	<p>2 2</p>

<ul style="list-style-type: none"> - public and private sector work together during the consultations 	S ₂₁	2 --- There is no information on the research on the type of tourism the stakeholders want to host in public documents although the wide consultations with adequate stakeholders were conducted.
II Situation analysis and programming		W ₁₁ = 0.2
5. The tourism resources and market analysis for national tourism development	S = 1 if there are major stakeholders and elements of supply and demand of tourism market included S = 2 if there are major stakeholders and elements of supply and demand of tourism market included (including separate analysis of country's tourism destination and regions) S = 4 if there are major stakeholders and elements of supply and demand of tourism market included (comprising separate analysis of country's tourism destination and regions) and natural resources are presented from the point of view of ecosystem services	
<ul style="list-style-type: none"> - domestic (national) market: major stakeholders (tour operators, travel agents, national and regional authorities, NGOs etc.) - tourism supply: products, services, infrastructure and facilities - demand of the domestic market (income, costs, positive and negative trends in demand, working hours) - strategic planning method analysis (e.g. SWOT) - needs for further development and official forecasts 	S ₂₂ S ₂₃ S ₂₄ S ₂₅ S ₂₆ ---	2 2 2 2 2 --- All actions of each operational goal in every one of four priority areas were correlated with factors identified in SWOT analysis in order to improve the potential of the tourist offer.

		Next to GDP there should be more indicators for realization of the police's possible scenarios.
6. Political factors and international aspects of tourism development		<p>S = 1 if the description includes the national destination only</p> <p>S = 2 if the description includes the national and regional destinations</p> <p>S = 3 if the description includes the national and regional destinations and their <i>competitiveness</i> is described</p>
<ul style="list-style-type: none"> - product and infrastructure development, general industrial policy starting points - destination marketing - reinforcing the image of the country as a tourist destination - benchmarking (product, strategic) - the strategy gives the answer to which type of tourism is best for the national destination 	<p>S₂₇ 3</p> <p>S₂₈ 3</p> <p>S₂₉ 3</p> <p>S₃₀ 3</p> <p>S₃₁ 3</p> <p>---</p> <p>In this point the author evaluate the Marketing Strategy for Poland in Tourism Sector (2012 – 2020) by the Polish Tourism Organisation (POT) which was prepared as implementation of the <i>Directions...</i></p> <p>In the <i>Directions...</i> there is Priority area 3 – Marketing support which focuses on improvement of the tourist information system and integrated tourism marketing system.</p>	
III The grade of enhancement on sustainable approach to tourism in policies		W _{III} = 0.1
7. Linkage of tourism to other sectors (the grade of complementation of management documents of the following sectors with tourism development planning)		<p>S = 1 if there are tourism issues involved in documents</p> <p>S = 3 if there are targets within the documents which define how tourism will help to solve problems of other sector (e.g. agrotourism complements aims of rural development strategy)</p> <p>S = 5 if there are targets within the documents which define how</p>

	tourism will help to solve problems of other sector involving the quality of live for host and visitor S = 6 if there are targets within the documents which define how tourism will help to solve problems of other sector involving the quality of live for host and visitor and there is a special chapter in tourism strategy describing the connections	
<ul style="list-style-type: none"> - environmental policy - agriculture and forestry - regional and rural development policy - transport strategy - health policy - employment policy 	S ₃₂ S ₃₃ S ₃₄ S ₃₅ S ₃₆ S ₃₇	1 3 3 2 3 3 Ad. S ₃₂ tourism is hardly mentioned in the document representing environmental strategy in Poland, there is measurable linkages between tourism and biodiversity (targets, indicators for monitoring) in <i>Directions...</i> either Ad. S ₃₂ tourism belongs to social aspects of transport policy and enhance the role in stimulation of tourism movement in road and air transport Ad. S ₃₃ - S ₃₄ <i>the National Strategic Plan of Rural Development</i> includes tourism in indicators such as number of tourism accommodation on the rural areas (without the private accommodation places) and in plans for differentiation of the agricultural activities and improving of the quality of life in rural areas as well as tourism influence on employment and nature protection importance in tourism activities in general; tourism is noticed in SWOT analysis, <i>Directions...</i> are not mentioned

	<p>in the document</p> <p>Ad. S₃₆ public health is mentioned in the list of foundations of the <i>Directions...</i> which states that tourism should shape public health, but there are no connections between public health education</p> <p>the National Sport Strategy in Poland until 2015 include one task nr.: 1.2.3. Promotion of active tourism through programs and infrastructure also for disabled people</p> <p>---</p> <p>There are several strategies indicated as complementary documents in the graph of coherence to <i>Directions...</i> in the document (p. 106, Polish version). There are identified tasks (for example for employment stimulation) in tourism field for 22 ministers and other institutions partly responsible for tourism development in Poland.</p>
<p>8. Reference to sustainable tourism agreements, conventions, protocols, EU policy towards development of sustainable tourism and nature conservation:</p>	<p>S = 2 if there is a reference to at least 1 document S = 3 if there is a reference to 2 S = 4 if there is a reference to more than 2</p>
<ol style="list-style-type: none"> 1) the Global Code of Ethics for Tourism (GCET) as a comprehensive set of principles designed to guide key-players in tourism development (WTO) 2) the United Nations Convention on Biological Diversity, especially Decision VII/14 Biological Diversity and Tourism and Decision V/25: Biodiversity and tourism, 2004 3) The Charter for Sustainable Tourism (developed in Lanzarote, Canary Islands) Spain, 1995 4) EU Sustainable Development Strategy (EU SDS) with indications for national policies on law foundation for sustainable development of tourism, implementation of principles for tourism in other sectors of state activity and enhancement on scientific research on relations between tourism development and environment protection 5) the Agenda for a Sustainable and Competitive European Tourism 	<p>S₃₈ 4</p> <p>Ad. S₃₈ <i>Directions...</i> are linked with European Union legislation and strategic documents. The <i>Directions...</i> follow the principals of <i>EU Sustainable Development Strategy</i> as well as <i>the National Ecological Policy for 2007-2010 and its 2011-2014 outlook</i>. There is one chapter (III) which reflects the correlation of <i>Directions...</i> between <i>Lisbon Strategy</i> and communications concerning sustainable tourism development in EU especially in: cooperation between stakeholders in tourism, indication of research organs for tourism studies, promotion of instruments for</p>

<p>6) European Charter for Sustainable Tourism in Protected Areas 7) Agenda 21 as a comprehensive plan of action to be taken by governments in every area in which human impacts on the environment, Rio de Janeiro, 1992 8) The Pan-European Biological and Landscape Diversity Strategy (PEBLDS) adopted at the 3rd Ministerial Conference "An Environment for Europe", Sofia, 1995 9) EU Strategy for the Danube Region, the Carpathian Convention (Tourism Protocol) 10) Other related to sustainable tourism development (fill with the name): </p>	<p>tourism advantage, introduction of satellite statistics, support for sustainable module for production and consumption, support for voluntary use of sustainable tourism indicators in tourism. There are interrelations between the competitive European tourism and sustainability explained as well as negative influences of tourism on environment.</p>												
<p>9. Social benefits and community profits</p>	<p>S = 3 if there are outcomes defining how tourism will contribute to the evaluated issue S = 4 if there are outcomes defining how tourism will contribute to the evaluated issue and recommendations for regional level tourism development strategies are included</p>												
<ul style="list-style-type: none"> - tourism is valued as the contributor to country's economy (preferably in %) - preservation and development of the culture in the region - distribution of income and prospects for employment - support to cultural heritage and local identity - maintenance of community infrastructure - participation of indigenous and local communities (e.g. community based tourism) 	<table border="0"> <tr><td>S₃₉</td><td>3</td></tr> <tr><td>S₄₀</td><td>3</td></tr> <tr><td>S₄₁</td><td>3</td></tr> <tr><td>S₄₂</td><td>3</td></tr> <tr><td>S₄₃</td><td>3</td></tr> <tr><td>S₄₄</td><td>3</td></tr> </table> <p>---</p> <p>It is mentioned that incorporation of local and regional traditions into tourism should not lead to an excessive commercialization (PRIORITY AREA II). Additionally, PRIORITY AREA III – MARKETING SUPPORT states that the components of a tourist offer should send the message that it respects local cultural and environmental values and</p>	S ₃₉	3	S ₄₀	3	S ₄₁	3	S ₄₂	3	S ₄₃	3	S ₄₄	3
S ₃₉	3												
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S ₄₄	3												

		social traditions. Operational objective 1.2. – Developing tourism infrastructure states that localisation and the technology employed should take into account the conditions resulting from the need to protect the environment. Innovations and proecological infrastructure solutions in natural protected areas will be initiated and in implemented in protected areas. The III objective plans developing assessment criteria for the integrated branded tourist products from the perspective of the pressure on the environment (e.g. efficient energy and resource consumption).
IV Participation of institutions in tourism management	$W_{IV} = 0.1$	
10. Setting up and enabling a National Tourism Organization as:	S = 3 if yes	
<ul style="list-style-type: none"> - a national body for tourism businesses and destinations - a source of best practice, offering tourism business advice - a custodian of the national product database 	S ₄₅ 3 S ₄₆ 3 S ₄₇ 3 --- There is no information about the business advice and database in the document but the NTO carries out these activities during implementation of the tasks.	
11. Enhancement on bottom – up approach in destination management	S = 3 if yes	
<ul style="list-style-type: none"> - local tourism bodies are responsible for a tourism destination which reflects the natural geography of an area's visitor economy (rather than local public sector or electoral boundaries) - the tourism policy gives the possibility for tourism bodies to band together into larger groups voluntarily 	S ₄₈ 0 S ₄₉ 3	

<ul style="list-style-type: none"> - ensuring financial sustainability of the bodies with minimum reliance on public funds (can act as partners with local authorities or local business partnerships) - reduction of taxes to central level - supporting creation of <i>Destination Management Organization</i> rather than Marketing Organizations - partnership between public sector and local authorities and local businesses and attractions - recognition of role of the bodies for Regional Development Strategies 	<p>S₅₀ 3</p> <p>S₅₁ 0</p> <p>S₅₂ 0</p> <p>S₅₃ 3</p> <p>S₅₄ 0</p> <p>---</p>	<p>Local and regional tourism organizations are responsible for tourism destinations but they do not reflect the natural geography of an area's visitor economy nor functional tourism regions. The analysis of tourist potential in the strategy concerns only administrative regions in strictly regional setting (in the II. Diagnosis of tourism sector and prognoses for 2008-2015) which is not enough. Cooperation of public and private sector and creating conditions supporting public-private partnership are also mentioned in the introduction and in operational objective I.4. – Development of entrepreneurship and of the activities of organizations in the field of tourism.</p>
<p>12. There are responsibilities determined for the strategy implementation for the following bodies:</p>	<p>S = 5 if yes</p>	
<ul style="list-style-type: none"> - ministries - the local and regional governments - tourism business associations, clusters, tourism entrepreneurs etc. - the non-governmental sector - protected area authorities, environmental institutions etc. 	<p>S₅₅ 5</p> <p>S₅₆ 5</p> <p>S₅₇ 5</p> <p>S₅₈ 5</p> <p>S₅₉ 5</p>	

V Sustainable development of tourism businesses, supply of services and special enhancement addressing nature protected areas	$W_V = 0.2$	
13. Plans to increase the number of environmentally oriented tourism providers and offerings by:	S = 1 if recommendations of the following actions are listed S = 2 if there are operative actions described for the implementation S = 3 if there are operative actions described and indicated bodies responsible for the implementation of these actions	
<ul style="list-style-type: none"> - support of certification and labelling schemes - strengthening cooperation between (organisation and financing) public and private entities as well as partnerships for sustainable tourism development - educational programs for tourist staff and their professionalization in the framework of tourism environmental impact and social responsibility 	S ₆₀ S ₆₁ S ₆₂	2 2 2 Ad. S ₆₀ Labelling and certification is described in development of tourism products (PRIORITY AREA I) and it aims to incentive the nature protection. Ad. S ₆₁ Action II.2.6 comprises support for cooperation of public administration and non-governmental organizations in civil society development for environmental protection as well as promotion of rational use of natural resources in tourism. There are to be created model management solutions to achieve aims of both operational objective I.3 and I.4. Legal regulations will tackle also the problem of seasonality in tourism. Support for regional, local and branch organizations in tourism and encourage for private-public partnerships will be provided. Ad. S ₆₂ Operational Objective II.2. concerns development of tourism education and social tourism with program based on quality of social and human capital and the natural environment.

	<p>---</p> <p>The document is related with <i>Ecological State Policy 2007-2010</i> with the perspective for 2011-2014 and <i>National Strategy for Protection and Moderate Use of Biodiversity together with Action Plan</i>.</p>
<p>14. Grade of incentive and encouragement to sustainable practices in tourism companies:</p>	<p>S = 1 if country has sustainable policy for resources management with relevant legislation S = 2 if the legislation provides alternatives for resources' using S = 3 if state government stimulates sustainable practice with finance benefits (tax reducing, tariff reducing)</p>
<ul style="list-style-type: none"> - energy efficiency - efficient water management solutions - waste management 	<p>S₆₃ 3 S₆₄ 3 S₆₅ 3</p> <p>---</p> <p>National Council of Water Management, <i>National Water Policy Project until 2030</i>, <i>National Energy Policy until 2030</i> include a few points with tourism in their area of planning.</p> <p>Chapter on tourism and environment (especially nature protected areas) in the document underlines the role of the environment in shaping tourism in Poland. There should not be indicated "types of sustainable tourism" because ecotourism may threaten the highly evaluated natural sites as well. Nevertheless the importance of environmental management in tourism and rising ecological awareness of young generation through tourism is underlined. Moreover the interdependence of supply and demand of ecologically</p>

	<p>friendly tourism is stressed which is important as far as ecological trends in tourism are included. Unfortunately the content of the chapter seems to be disconnected from other parts of the document.</p>
<p>15. Support for financial contribution from the tourism industry to nature protection services:</p>	<p>S = 3 if there are: a system or instruments with relevant legislation and rules S = 4 if there is evidence (data) that stakeholders use these instruments</p>
<ul style="list-style-type: none"> - enhancing regional marketing as the foundation for sustainable tourism development, particularly in UNESCO biosphere reserves and national parks - areas close to or in populated regions are protected for nature-based recreation - incorporating the European Union network of Natura 2000 sites in tourism territorial development and marketing 	<p>S₆₆ 3 S₆₇ 0 S₆₈ 3</p> <p>In the chapter for tourism and environment relation (IV) the protection and development of PAs is linked with high quality tourism products (including N2000 areas). But also in the operational Objective IV.1. – Shaping the development of tourism so as to preserve and increase the value of tourist space is enhanced for PAs as well according to their ecological capacity. Environmental criteria are suggested to be taken into account when deciding about the designation of new land for investment and about the nature of land development. During realization of this objective, support will be granted to tourism-related projects carried out in accordance with Agenda 21. Also operational objective I.2. – Developing tourism infrastructure regards investing in the infrastructure which would maintain the natural resources for future generations, which will include: protection of the nature and landscape (Natura 2000 included), protection of the</p>

		cultural landscape as an element of tourism product and making available the knowledge about systems of protection nature and landscape beyond the borders of their institutional and legal protection.	
VI Tourism strategy measures	$W_{VI} = 0.1$		
16. Indicators and targets comprise important part of the strategy	S = 4 if yes If no go to indicator no. 18		
<ul style="list-style-type: none"> - strategy includes targets to be fulfilled - strategy recommends indicators for monitoring - targets are combined with indicators in order to measure impacts 	<p>S₆₉ 4 S₇₀ 4 S₇₁ 0 ---</p> <p>The indicators for the document's implementation evaluation are macroeconomic indicators. The actual level of each indicator will measure the difference with previewed level of for example: percentage of contribution of tourism industry to National Gross Product.</p>		
17. Indicators for monitoring are described in 8 groups ⁵ as headline indicators (not only complementary indicators):	S=0 if the indicator is not included in the strategy S= 1 if the indicator is included in the strategy		
(a) political <ul style="list-style-type: none"> - value of micro-loan program for local businesses respecting sustainability criteria and number of SMEs (Small and Medium Enterprises) supported by the programme - measures for evaluating tourist information policy (grade of including sustainability criteria in tourism promotion e.g. communicating access code for tourists, evaluation of tourist behaviour, knowledge and attitudes) - measures to policy for disabled people and equal access to tourism 	S ₇₂	0	
	S ₇₃	0	
	S ₇₄	0	

⁵ According to *Conceptual framework for tourism sustainability assessment* by T.G. Ko [in] *Development of a tourism sustainability assessment procedure: a conceptual approach*, Tourism Management 26 (2005) 431-445, Science Direct and *Criteria for sustainable tourism*, *Tourism for Nature* GEF project's publication.

<ul style="list-style-type: none"> - the map of regional supply chains through the establishment of local or regional cooperation (e.g. territorial communes tourist associations, clusters) - measures of participation and local control (measures of accessibility to information about the strategy, number of people and stakeholders that participated in decision-making process and the quality of their participation) - existence and quality of management plans, visitor regulations and monitoring measures 	<p>S₇₅</p> <p>S₇₆</p> <p>S₇₇</p>	<p>0</p> <p>0</p> <p>0</p>
<p>(b) economic</p> <ul style="list-style-type: none"> - value of tourism expenditure in tourism destination by target groups of tourist (annual growth) or change in visitor spending - percentage of GDP coming from tourism - measures taken to reduce the dependency on tourism and seasonality (percentage of income coming from tourism in the time-scale of the year, percentage of fulltime, part time and seasonal jobs in tourism, local unemployment rate off-season, local unemployment rate off-season) - length of average tourist stay (in days) - percentage of people employed in tourism or tourism related jobs - percentage of change in the total number of tourists - growth in % of the surface of the areas which are used for tourism 	<p>S₇₈</p> <p>S₇₉</p> <p>S₈₀</p> <p>S₈₁</p> <p>S₈₂</p> <p>S₈₃</p> <p>S₈₄</p>	<p>1</p> <p>1</p> <p>1</p> <p>0</p> <p>0</p> <p>1</p> <p>0</p>
<p>(c) socio-cultural</p> <ul style="list-style-type: none"> - increase/decrease in cultural activities or traditional events and level of participation - level of awareness of local values and cultural heritage - number of local businesses related to the local culture (handicrafts, music, food) - extent of traditional land use - number and quality of infrastructure development stimulated by tourism - percentage of locals using tourism related infrastructure - proportion of tourism revenues reinvested by administration in public responsibilities - tourism's contribution to the preservation of cultural goods - evaluation of the local inhabitants' experiences with and attitudes towards tourism (percentage of locals who are satisfied with tourism development) - evaluation of the tourists' experience 	<p>S₈₅</p> <p>S₈₆</p> <p>S₈₇</p> <p>S₈₈</p> <p>S₈₉</p> <p>S₉₀</p> <p>S₉₁</p> <p>S₉₂</p> <p>S₉₃</p> <p>S₉₄</p>	<p>0</p>

<p>(d) service and product quality</p> <ul style="list-style-type: none"> - number of Green Tourism Business Awards - number and type of tourism attractions, tourism products and visitor infrastructure - quality measures of accommodation, food, transport and other services - evaluation of safety - tourists' satisfaction evaluation (percentage of return visitors, visitor expectations versus experience measure, satisfaction rating for those visitors whose experience exceeded their expectations (in 1-5 scale, 1 (much worse than expected) to 5 (much better than expected)) - length of the tourism season - existence and quality of visitor/information centers, interpretative materials (e.g. brochures, panels), guided tours, trails, cycling routes, signage (length of trails, number and language of signs) - level of training (guards, guides, information, catering, management, etc.) 	<p>S₉₅ S₉₆ S₉₇ S₉₈ S₉₉ S₁₀₀ S₁₀₁ S₁₀₂</p>	<p>0 0 0 0 0 0 0 0</p>
<p>(e) general environmental impacts</p> <ul style="list-style-type: none"> - intensity of use (tourist/hectare or km of trails, carrying capacity indicators, level of use of protected areas and natural environment) - percentage of tourism businesses with appropriate resource management - behavior and attitudes of tourists and locals towards environmental protection - type and extension of protected areas, percentage of extended surface of protected areas and creation of new ones 	<p>S₁₀₃ S₁₀₄ S₁₀₅ S₁₀₆</p>	<p>0 0 0 0</p>
<p>(f) ecosystem quality</p> <ul style="list-style-type: none"> - revenue from tourism allowed to environment protection activity - number and quality of direct engagement of tourism business in projects and programmes for the improvement of environment - effectiveness of resource management measured e. g. by amount of waste and water consumed per tourist per day - scale of impacts due to tourism infrastructure (e. g. erosion caused by trails, consumption of territory) - type and percentage of transport facilities used (tourists arriving by car, train, etc., number of tourists using public transport) 	<p>S₁₀₇ S₁₀₈ S₁₀₉ S₁₁₀ S₁₁₁</p>	<p>0 0 0 0 0</p>
<p>(g) biodiversity</p> <ul style="list-style-type: none"> - percentage of endangered species 	<p>S₁₁₂</p>	<p>0</p>

<ul style="list-style-type: none"> - habitat status changes measures - monitoring of tourist flow is mentioned - tools for tourist flow mitigation are previewed 	S ₁₁₃ S ₁₁₄ S ₁₁₅	0 0 0
(h) environmental policy and management <ul style="list-style-type: none"> - amount of financial contribution of tourism to funding of conservation - number and type of measures to engage locals in protection activities (meetings, programs, expenditure) - percentage of locals actively involved in conservation activities - percentage of tourism managers with environmental training - percentage of tour operators and hotels with an environmental strategy or policy - existence of a land use or development planning process including tourism - existence of the environmental impact assessment legal procedure 	S ₁₁₆ S ₁₁₇ S ₁₁₈ S ₁₁₉ S ₁₂₀ S ₁₂₁ S ₁₂₂	0 0 0 0 0 0 0
VII Financing and Implementation of the National Tourism Strategy	W_{VII} = 0.2	
18. Financing	S = 1 if there are indicated concrete institutions who are responsible for financing S = 2 if there is indicated concrete amount for each measure implementation	
<ul style="list-style-type: none"> - financing is secured through governmental and voluntary resources for the entire period of the strategy - the strategy implementation is accompanied by a micro-loan program for local businesses respecting sustainability criteria 	S ₁₂₃ S ₁₂₄	2 0
19. Monitoring and Evaluation	S = 0 if no S = 3 if yes	
<ul style="list-style-type: none"> - M&E is a substantial part of the strategy - the strategy has clearly described ways and means of monitoring, including the responsible body and intervals of monitoring - the periodical monitoring is made public - there are simple qualitative along with quantitative data gathering means 	S ₁₂₅ S ₁₂₆ S ₁₂₇ S ₁₂₈	3 3 3 0

Recommendations:

- The sectorial long-term vision strategy (more than 5 years, preferably 10 with necessary updates) should describe the variety of tourism development of the country with all type of financing sources taken into account. It would be a valuable source of information to all sectors involved in tourism, public, business and non-governmental. It would be a term of reference to the regional and local actions of communities in the strategic planning for other sectors of economy as well.
- The *Directions...* are connected with several strategic documents in Poland on the national and local level. Nevertheless, it is necessary to recognize other fields where tourism may be complementary to the development of these sectors of economy, social and environmental aspects. The diagram on page 10 presents complementary strategies and documents to Polish Tourism Development Strategy which also should be taken into account for example: *The National Strategy on the Protection and Sustainable Use of Biological Diversity*.
- In order to be available for all stakeholders there should be a short, 60-80 pages of easy-to read version of the document prepared.
- The tourism resources and market analysis for national tourism development should include natural resources are presented from the point of view of ecosystem services.
- National tourism marketing need to include more offer of touristic regions and territorial partnerships next to the offer of administrative regions.
- Financing of the tasks should be connected to diversity of sources and the cooperation of different ministries, institutions (for example of environmental protection) in strategic planning should be more visible.
- The realization of the *Directions...* should not be only evaluated on tourism participation in the country GDP but based on selected indicators in the framework of natural, economic and social conditions of the Polish territory. There is a lack of proper sustainable tourism development indicators listed to be monitored by monitoring research such as recommended by:
 - a. EC (2007) ACTION for MORE SUSTAINABLE EUROPEAN TOURISM Report of the Tourism Sustainability Group,
 - b. European Commission (2004) Methodological Work on measuring the sustainable development of tourism. Luxembourg,
 - c. UNWTO (2004) Indicators for Sustainable Tourism: A Guidebook, Madrid,
 - d. Tourism for Nature project:
http://www.tourism4nature.org/results/backdocs/ETE_2009_Criteria_Sustainable_Tourism.pdf.

Attachments:

1. Directions for Tourism Development until 2015 (English)
2. Kierunki rozwoju turystyki w Polsce do 2015 (Polish)
3. Information about the realisation of statutory tasks of Interministerial Team for coordinating the tasks of the Government included in Directions for Tourism Development until 2015 (Polish)
4. Marketing Strategy for Poland in Tourism Sector from 2012 – 2020 (English)
5. the National Development Strategy (2007-2015) (English)
6. the National Environmental Policy for 2007-2010 (English)

Update comments for the year 2013

The strategy has been implemented all over the 2012 according to the document: *Directions for Tourism Development until 2015*.

In april 2013 there was the interministerial report on its implementation in 2012, published on the internet site of the Ministry of the Sport and Tourism of the Republic of Poland (<http://www.msport.gov.pl/strategie-turystyka>). The report is a part of evaluation and monitoring process for the strategy (also assessed in the table above) and it was prepared by Interministerial Team for coordinating the tasks of the Government included in Directions for Tourism Development until 2015. The report is published once a year. The team was created in 2009 and there were 4 reports published so far.

Responsibilities of individual ministers/directors affecting the development of tourism which were listed in the *Directions...* define their areas of implementation of the document. Almost all of them reported the steps of implementation:

1. Minister competent for construction industry, spatial economy and housing,
2. Minister competent for public finance,
3. Minister competent for economy,
4. Minister competent for maritime management,
5. President of National Water Management Authority,
6. Minister competent for foreign affairs,
7. Minister competent for internal affairs,
8. Minister competent for higher education,
9. Minister competent for education,
10. Minister competent for transport,
11. Minister competent for environment,
12. Minister competent for regional development,
13. Minister competent for rural development,
14. Minister competent for culture and protection of national heritage,
15. Minister competent for physical culture and sports,
16. Minister competent for science,
17. President of the Office of Competition and Consumer Protection and
18. Central Statistical Office of Poland (GUS).

Only Minister competent for the Treasury, Minister competent for social policy, Minister competent for labour and Minister competent for health did not had their own chapters in the report.

This means that Ministerstwo Pracy i Polityki Społecznej (Ministry of Labour and Social Policy), Ministerstwo Skarbu (Ministry of Treasury) and Ministerstwo Zdrowia (Ministry of Health) did not presented their implementation achievements directly. Nevertheless, the Minister of Economy described also the situation on the market of employment and work for example.

Attachment:

1. Informacja o realizacji w roku 2012 (Information about realization in 2012) (Polish)