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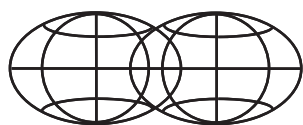
Tourism in Poland following EU entry

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Abstract. The aim of this study was to examine how tourism developed in Poland following EU entry. A particularly large increase in local government spending on tourism and foreign tourist expenditures have been observed for the study period in Poland. An increase in passenger volume at Polish airports has also been observed. Among the many factors influencing the situation in the domestic tourism market, regulations relating to EU entry and the inflow of grants from the EU were of leading importance. At the same time, Poland's entry into the EU may accelerate some change processes, the effects of which may be observed in the future.

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1. Introduction

Poland has been a part of the EU since May 1, 2004. Tourism in Poland and in other post-communist countries has been a key contributor to the countries' economies thanks to EU integration (Šabić, Pavlović, 2007; Hołowiecka, Grzelak-Kostulska, 2013).

The geography of Poland is determined by its location in Central Europe and that fact has a strong

effect on commerce and social development in Poland and its neighbors. These influences arise from the specificities of the geographic location of Poland and its historically multiethnic, multilingual and multicultural character. On the other hand, the evolution of socio-economic structures has also influenced the characteristics of Poland's geographic location. The politically complicated geographic location of Poland has been a fundamental factor in its social development (Šabić, Pavlović, 2006).

Research on tourism and the integration of processes within EU countries, in addition to outlining the role that tourism plays in the European economy, often pays attention to systems created for tourists in connection with EU entry including a single currency and the expansion of low-cost airlines (Åkerhielm et.al., 2003). It also raises the issue of influx of EU funds, which often go to the tourism industry. Detailed analysis of programs realized in 1994–1999 and 2000–2006 via Structural Funds has shown that many member states' tourism investment seems to be more intensive than their tourism potential or the role that tourism has played in their economies (Butowski, 2010). In the case of Poland, the importance of EU funds is also a key issue (Batyk, Smoczyński, 2010). The authors point to the role of tourism projects co-financed by the European Social Fund and the Polish government, where one of the objectives was to increase the competitiveness of the tourism industry in Poland and to create regional tourist offerings using a network formula (Batyk, Smoczyński, 2010). Quite a lot of attention has been paid to the harmonization of EU law with Polish law in the field of tourism (Jarmul et.al., 2003). Other tourist concepts from the 1990s and 2000s are also illustrated including stag tour groups, which were drawn to Central and Eastern European cities by the promise of cheap alcohol, restaurants and entertainment (Thurnell-Read, 2012) However, there are only a few publications in the literature that comprehensively describe the issue from the perspective of the changes that have occurred in the Polish tourism industry after European integration.

2. Materials and methods

The main objective was to investigate how tourism developed in Poland following EU integration. In the test procedure, documentary research, analysis and logical design, and the statistical and monographic method were used. Statistical data from Poland's Central Statistical Office were analysed in order to select the most useful information. The selected data were analysed in detail in terms of the rate of change for different years from the time of EU integration. On this basis, research results were

interpreted and conclusions presented. At the same time, studies prepared by the Polish Ministry of Sport and Tourism and the Ministry of Regional Development proved to be useful. The documentary test method was supplemented by the analysis and logical design method, which was based on the separation of the different parts of the research problem, and then the examination of each part. Therefore, three main issues were separated. First, each part was characterized based on selected changes that have taken place in the country following EU entry, taking into account data associated with tourist traffic and landscape tourism. Second, local government expenditures on tourism were considered. Third, the inflow of EU funds and their importance for the development of tourism were analysed. Fourth, other issues related to EU integration were analysed including legal considerations, inclusion of Poland in the Schengen unrestricted travel zone, and the expansion of low-cost airlines. The final stage was a synthesis of all relevant issues, which allowed survey respondents to combine different elements together. The analysis of changes taking place in Polish tourism following EU integration was carried out on the basis of selected issues. Therefore, it is not possible to describe all aspects of this subject, as tourism is interdisciplinary in nature and exhibits a number of linkages with other areas of study. In addition, it should be noted that the changes that have occurred since EU integration did not take place in isolation from other social and economic processes.

Data on the size of the Polish tourism industry for the year preceding EU entry and the year following EU entry are derived from estimates provided by the Tourism Institute, which conducts research on behalf of Poland's Department of Tourism of the Ministry of Sports and Tourism Research as part of the Statistical Research on Public Statistics program. Data from Poland's Central Statistical Office were used to analyse changes in the number of overnight stays at collective accommodation facilities for the year prior to and following EU entry. Issues concerning foreign tourists and their expenditures in Poland were also analysed.

Data obtained from the Ministry of Sports and Tourism, based on research pursued by the Central Statistical Office, were used to analyse local government expenditures on tourism. In this study, refer-

ence is made to the issue of the inflow of EU funds and readily observable effects on tourism. Data from the Ministry of Regional Development was especially useful. The data obtained were analysed for two time intervals: 2004–2006 and 2007–2013.

Another factor that influenced the development of tourism in Poland was the need to harmonize Polish law with EU law. This part of the study included a review of both scientific publications and research results carried out by various institutions on public opinion in Poland upon its entry into the Schengen zone. Airline passenger traffic is also analysed using data from the Central Statistical Office. Passenger volume at airports in the Polish market is analysed for 2003 and 2011. The examination of these data is related to the emergence of low-cost airlines in the Polish market.

3. Research results

According to estimates from the Institute of Tourism, 13.7 million tourists had visited Poland in

the year prior to EU entry (Bartoszewicz, Skalska, 2004). In the first two years following EU integration, the number of tourists increased, reaching a maximum in 2006. Another increase was recorded in 2010. Most foreign visitors in Poland come from neighboring Germany (Table 1). However, the number of German visitors has remained virtually unchanged. The number of tourists coming from 'old' EU member countries (pre-2004) and selected overseas destinations has increased. On the other hand, the number of tourists from Russia, Ukraine, and Belarus has decreased since 2003. The three countries do not belong to the EU. The number of Polish citizens traveling abroad has also decreased. Poles still prefer to visit Germany, but the share of Polish travelers to Germany has decreased. The number of Poles leaving for the United Kingdom has increased substantially since 2004. Given the number of overnight stays provided by collective tourist accommodation facilities during the studied period, there is a noticeable increase over the year prior to EU entry, including the number of nights stayed by foreign tourists (Table 2).

Table 1. Arrivals of tourists in Poland in 2003–2010 (in thousands)

Year	2003	2004	2005	2006	2007	2008	2009	2010
Total World	13,720	14,290	15,200	15,670	14,975	12,960	11,890	12,470
Germany	4,520	5,230	5,570	5,440	5,270	4,780	4,560	4,520
Russia	790	700	735	710	545	410	320	400
Belarus	1,620	1,460	1,440	1,490	1,350	870	865	970
Ukraine	2,480	2,340	2,535	2,500	2,120	1,550	1,295	1,350
Lithuania	825	815	830	895	715	695	620	620
Latvia	330	305	270	315	355	340	230	270
Estonia	150	130	120	145	170	145	115	90
Czech Republic	240	210	185	165	165	180	175	175
Slovakia	80	85	70	70	70	80	85	95
15 UE without Germany	1,645	1,790	2,015	2,365	2,495	2,270	2,190	2,355
Important overseas (Australia, South Korea, Japan, USA, Canada)	330	400	505	550	545	470	390	460
Other countries	710	825	925	1,025	1,175	1,170	1,045	1,165

Source: Bartoszewicz, W. and Skalska, T., 2011: *Zagraniczna turystyka przyjazdowa do Polski w 2010 roku*, Warszawa: Instytut Turystyki, p. 38

Table 2. Overnight stays at collective tourist accommodation establishments in 2003-20011 (in thousands)

Specification	2003	2004	2005	2006	2007	2008	2009	2010	2011
Poland	45,347	46,657	48,618	51,235	54,954	56,646	55,020	55,795	57,148
Accommodation granted to foreign tourists (night spends)	7,828	9,313	10,542	10,555	10,918	10,173	9,609	10,064	10,620

Source: Own elaboration based on data from the Central Statistical Office

There was a significant increase in the average tourist expenditure per person per day of stay in Poland (Table 6). In 2010 there were 7,206 collective accommodation facilities in Poland. There has been a slight increase in the number of facilities since 2003, but the number has remained steady during the study period. The geographic distribu-

tion of collective tourist accommodation facilities in 2011 does not differ much from the situation prior to EU entry. What has changed somewhat is the length of tourist itineraries, according to the Polish Country Lovers' Society. The number of travel agencies and tourist guides has decreased (Table 6).

Table 3. Expenditures of voivodships and all administrative units (voivodships, poviats governments, urban poviats and gminas) on tourism in the years 2003-2010 (in zlotys)

	2003	2004	2005	2006	2007	2008	2009	2010
Voivodships	7,679,464	8,671,798	12,879,267	13,770,583	21,696,749	27,349,177	210,762,625	6,657,739,298
Total (voivodships, poviats governments, urban poviats, gminas)	85,866,118	73,052,429	109,513,865	161,144,361	201,888,362	194,824,828	464,850,730	720,628,427.61

Source: Own elaboration based on data: Departament Turystyki, 2010: Wydatki jednostek samorządu terytorialnego w 2010 roku na turystykę, available from: <http://www.msport.gov.pl/badania-rynku-turystycznego/2425-Wydatki-jednostek-samorządu-terytorialnego-na-turystykę-w-2-1-roku>, DoA: 18 December 2012 and on data: Wydatki jednostek samorządu terytorialnego na turystykę, available from: www.mg.gov.pl/NR/rdoonlyres/7B1BCCF1.../turystykawydutki.doc, DoA: 18 December 2012

Table 4. Effects to be achieved by the implementation of signed financial agreements, as part of Regional Operational Programmes

	Length of tourism routes	Number of tourist and recreational facilities	Number of new tourist products	Number of tourists using the reservation system and tourist information	Number of tourists using produced / modernized tourist products	Number of created direct new jobs places
Total	162,178	274	194	8,873,420	5,804,176	526

Source: Own elaboration based on data: Ministerstwo Rozwoju Regionalnego Departament Koordynacji i Wdrażania Programów Regionalnych, 2010: Realizacja projektów z zakresu turystyki w ramach Zintegrowanego Programu Operacyjnego Rozwoju Regionalnego, Programów Inicjatywy Wspólnotowej Interreg III, Regionalnych Programów Operacyjnych, Programu Operacyjnego Polska Wschodnia Programu Operacyjnego Innowacyjna Gospodarka oraz Programów Europejskiej Współpracy Terytorialnej, http://d1dmfej9n5lgmh.cloudfront.net/msport/article_attachments/attachments/10375/original/Turystyka_w_programach_operacyjnych.pdf?1334720724, DoA: 18 December 2012

Table 5. Passenger traffic at airports in Poland in 2003 and 2011

	2003	2011
Arrivals	3,520,411	10,827,799
Departures	3,546,116	10,938,072
Transit	54,289	121,552

Source: Own elaboration based on data from the Central Statistical Office

Table 6. Selected tourism industry data for Poland

	2003	2011	Change (%)
Arrivals of tourists in Poland (in thousands)	13,720	13,350	-370 (-2.69)
Overnight stays at collective tourist accommodation establishments (in thousands)	45,347	57,148	+11,801(+26.02)
Accommodation granted to foreign tourists (night spends)	7,828	10,620	+2,792 (+35.66)
Expenditures of foreigners visiting Poland (in USD) per person	114	390 (in 2010)	+276 (+242.10)
Expenditures of foreigners visiting Poland (in USD) per day	24	75 (in 2010)	+50 (+208.33)
Polish tourists travels abroad (the number of Polish citizens traveling abroad in millions)	7,2	6,3	-0,9 (-12.5)
Collective tourist accommodation	7,116	7,039	-77 (-1.08)
Length of tourist routes	58,291.7	72,238.8	+13,947.1 (+23.92)
Number of tourist guides	11,553	8,941	-2,612 (-22.60)
Number of travel agencies	3,504	3,074 (in 2010)	-430 (-12.27)
Expenditures of voivodships poviats governments, urban poviats and gminas on tourism (in zlotys)	85,866,118	720,628,427,61 (in 2010)	+634,762,309.61 (+739.24)

Source: Own elaboration based on data from the Central Statistical Office and on data from the Institute of Tourism

In 2010, voivodship governments spent a lot of money on tourism (Table 3), which was a significant decrease compared with the previous year, but a huge increase since 2003. Taking into account the total for all government entities (voivodships, poviats, urban poviats and gminas), significant growth can be observed. This is especially true of poviats. Table 6 provides a summary of the discussed changes.

The influx of EU funds directly and indirectly affects tourism, which benefits from the financial support offered by various European financial instruments. In 2004–2006, tourism-related projects were mainly funded under the Integrated Regional Operational Programme (Table 4) and the Community Initiative INTERREG III. In the case of the former, the following types of activity were especially relevant in the realm of tourism: 1.4. devel-

opment of tourism and culture, 3.1. rural areas, 3.2. areas undergoing restructuring, 3.3. degraded urban and post-military areas. The second program was financed by the European Regional Development Fund and consisted of three main components: A, B, C. From a financial perspective for the period 2007-2013, the following are most relevant in the development of Polish tourism: Regional Operational Programmes, Operational Programme of Eastern Poland Development, Operational Programme of the Innovative Economy, and European Territorial Cooperation. Of particular importance to tourism are the regional operational programs, which affect the following: 1) promotion of natural resources, 2) protection and renewal of natural heritage, 3) improvement of tourist services.

Each voivodship has an individual program tailored to its own resources and funding opportuni-

ties. In the case of the Programme of Eastern Poland Development, most cooperation relates to the improvement of the image and attractiveness of the region to investors. This pertains to the following eastern voivodships: Lubelskie, Podkarpackie, Podlaskie, Świętokrzyskie, and Warmińsko-Mazurskie. Particular emphasis is placed on the development of infrastructure related to bicycle traffic as well as business tourism. Common action in the field of tourism also takes place through the implementation of European Territorial Cooperation Programmes. Poland takes action with neighboring countries belonging to the European Union including the Czech Republic, Lithuania, Slovakia, Denmark, Germany, and Sweden as well as non-EU states such as Belarus, Russia, and Ukraine. The Innovative Economy Programme concerns tourism and creates the opportunity to promote Poland in the international marketplace, while the Human Capital Operational Programme creates the opportunity to invest in the skills of people working in the broadly defined travel industry.

The scope of the project is rather wide and concerns the promotion of tourist offerings and the training of personnel for the tourism industry. It also helps to improve the tourist attractiveness of Poland and to protect and preserve cultural heritage and natural heritage. The Integrated Regional Operational Programme covered a total of 217 projects in the field of tourism (Ministerstwo Rozwoju Regionalnego, 2010). The program also helped restore historical buildings, several of which were adapted for cultural and tourist purposes, and tourist information centers and new jobs were created. ROP funds for tourism from the ERDF program in 2007–2013 had provided 738.4 million euros (Ministerstwo Rozwoju Regionalnego, 2010). Table 3 shows that the planned investments are expected to contribute to the creation of 194 new tourism offerings. This will benefit more than 5 million visitors and generate 526 jobs. Without this support, much of the investment would not be possible. Finished projects improve infrastructure and tourist attractiveness via gyms, playgrounds and cultural sites. Other benefits include new sewage treatment plants and best practices and environmental protection.

EU funds were also one of the sources of financing investments in preparation for Poland's European Championships in Football (Euro 2012).

including stadiums and other infrastructure such as roads and apartments. Poland's entry into the EU required a harmonization of Polish law with EU law in the field of tourism. Adaptation activities, conducted in 1995–2003 by authorities responsible for tourism, applied to the following thematic areas: (a) consumer protection; (b) small and medium-sized tourism enterprises; (c) freedom to establish a private business and to provide services; (d) tourism statistics (Jarmul et.al., 2003).

In addition, the inclusion of Poland in the Schengen unrestricted travel zone, apart from its symbolic meaning, resulted in a significant facilitation of movement within the European Union, and contributed to the strengthening of cooperation, information sharing, and at the same time, compromising of security in some areas. With regards to neighboring countries that do not belong to the EU, there is a possibility to facilitate the crossing of frontiers via so-called small border traffic. According to opinion surveys in Poland on the abolition of internal borders in the EU in the year following Poland's entry into the Schengen zone, 54% of the Polish population positively viewed the abolition of internal borders, pointing to a number of related advantages, mainly in terms of easier movement within Europe (Ośrodek Badania Opinii Publicznej, 2008). At the same time, many pointed to certain problems, including an increase in the amount of drugs entering the country and other illegal goods (Ośrodek Badania Opinii Publicznej, 2008). Poland's 2004 entry into the European Union resulted in the adoption of legislation in other areas with a connection to tourism.

A significant change was the possibility for foreign air carriers to serve Polish airports. Another key change was the opening of labor markets in the UK and Ireland (Maj, Szymkiewicz, 2012). Comparing the year 2011 to the year preceding EU integration from the perspective of airline passenger traffic at airports in Poland, the number of arrivals increased 200% and the number of departures increased almost 200% (Table 5). Since Poland's EU entry, dynamic changes in the market share of low-cost airlines and traditional carriers have also occurred. Already in the first two years following EU integration, the market share of low-cost airlines' has more than tripled (by 13.3% of passengers served). In 2010, the five largest carriers in Poland, PLL LOT S.A.,

Wizzair, Ryanair, Lufthansa, and EasyJet had a total of 83% market share (Maj, Szymkowicz, 2012).

4. Discussion and conclusion

By analysing the size of tourist traffic in Poland and the number of tourist trips taken by Poles abroad since EU integration, certain changes can be observed. Thus far the inflow of EU funds has not caused a significant increase in tourist traffic. It may be expected that continuous improvement in Polish tourism offerings, service quality, development of tourism infrastructure, availability of transportation options, improvement of tourist information systems and the promotion of Poland in the world will entice more tourists to visit Poland (Różycki, 2009). It should be noted that without the possibility of using EU funds, some tourism-related investments would have not been undertaken. According to the latest economic analyses prepared by the Ministry of Regional Development, the impact of EU funds on Poland's social and economic development is positive mainly due to increased investment activity and a better labor market, as well as the internal and external balance of the economy (Ministerstwo Rozwoju Regionalnego, 2012). A detailed analysis of the impact of investment on culture and tourism infrastructure financed by EU structural funds for socio-economic development of gminas and poviats in Śląskie Voivodship was carried out at the request of the Governor's Office of Śląskie Voivodship. The authors of the report revealed that EU projects affect the standard and quality of life, strengthen the competitive advantage of regions, and the vast majority help strengthen the positive image of institutions and communities, primarily at the local level (Centrum Studiów Regionalnych UniRegio, 2010). At the same time, the authors of the above mentioned report highlight some weaknesses such as low impact on the formation of cooperation networks with the private sector and non-governmental organizations, few projects featuring high levels of innovation, both in terms of culture and tourism, insufficient territorial and functional complementarity of projects in relation to the fact that the time horizon of the beneficiaries is mostly limited to the perspective of their own municipality (Centrum

Studiów Regionalnych UniRegio, 2010). Changes in Polish tourism may be analysed from various other points of view, as tourism is an interdisciplinary research issue. It is worth noting that Poles assess positively the effects of membership in the EU. This positive attitude dominates all age groups, professional categories, and social groups. Moreover, Poles' positive feelings about EU membership are much stronger (73%) than the overall EU average (52%) (Gospodarczo-społeczne efekty...).

Poland's membership in the EU should not be analysed in isolation from other socio-economic processes. European integration takes place simultaneously with the process of globalization, but also with previously adopted economic policy. At the same time, it is often difficult to determine which changes in the discussed indicators occurred in recent years as a direct result of Poland's entry into the European Union. However, one can assume that among the many factors influencing the situation in tourism industry regulations, the flow of funds from the European Union created an impetus for the accelerated development of the domestic tourism market. Poland's EU entry may have accelerated certain economic processes, and certainly launched a number of long-term systemic transformations, which may be inferred indirectly. In some areas, spectacular growth was observed – including growing expenditures of local governments on objectives related to tourism. However, increased local government spending did not produce a proportional increase in the number of tourists visiting Poland. It may be assumed that this is partly due to the ongoing global economic crisis, which impacts most countries, regardless of political or economic affiliation.

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