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Tour Management and Tourist Guidance in Poland Deregulation and New Challenges

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TOUR MANAGEMENT AND TOURIST GUIDANCE IN POLAND DEREGULATION AND NEW CHALLENGES

Abstract

Together with the changes which are currently taking place in world tourism, the social and professional roles of tourist guides are also undergoing a process of gradual transformation. A deregulation of the profession of tourist guide and tour manager which was initiated in the EU countries contrasts with the protection of the tourist guide job market in the majority of countries which do not belong to the European Union. Despite and maybe because of the deregulation, the need to maintain the quality of the services offered by local tourist guides and tour managers in EU countries, leads to an implementation of trade-specific systems of certification. Such a situation is currently taking place in Poland. In the article, the author discusses the changes taking place in tourism and tries to identify the consequences which these changes have on tourist guidance and tour management; he also presents the models of functioning of tourist guidance in world tourism and presents the main principles of associated with the certification of tour managers and tourist guides in Poland.

Keywords: tourist guide, tour manager /leader/, deregulation, qualifications, certification

Introduction

The main topic of the analysis focuses on problems associated with the functioning of tourist guidance and tour management. In the article, the author analyzes the changes taking place in contemporary tourism as well as their

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consequences for the social and vocational roles of tourist guides. The fundamental goal of the article is to analyze the models of functioning of tourist guidance in the world as well as the systemic and qualitative changes taking place in it. The author points to both negative and positive consequences of deregulation within the profession of tourist guide and tour manager which is gradually being implemented in EU countries. Deregulation forces the tourist sector to develop a separate system whereby it becomes necessary to confirm one's qualifications by means of special certificates. In Poland, the above activities have been linked to the creation of a trade-specific framework of qualifications for the professions which operate within the tourist sector, but are not covered by the formal school and academic education.

1. New trends in tourism

The observed trends in tourism are chiefly the result of demographic changes (age, health, education), technological changes (transport, internet) as well as changes in lifestyle. The above changes lead to certain definite consequences for the tourist sector. As regards its motivation, contemporary tourism has done away with the "3S" (*sun, sea and sand*), while more and more frequently tourists are motivated to travel by factors which could be defined as "3E" (*entertainment, excitement, education*), i.e. by motivations focusing on becoming acquainted with cultural values, taking an interest in people's everyday life today and in the past, as well as on entertainment and active tourism. Within the so called cultural tourism, there has also arisen a "4H" rule (*habitat, heritage, history, handicrafts*). Heritage tourism which creates a demand for tourist guidance and to a large degree tour management services, also belongs to these modern-day formulas of 21st century tourism.

As a consequence of the changing trends in tourism, one can also expect changes in the behavior of modern-day tourists. One should mention here the main features which characterize the new type of tourist. Among the most important ones, we ought to mention: independence (self-reliance) and earlier tourist experience, as well as an interest in and active use of new technologies. Another important characteristic of modern tourists is their emphasis on quality (value for money) and an expectation that they will receive the best possible quality for a good price. The "new tourist" is also characterized by enhanced

self-activity, greater curiosity of the world and of various cultures, an increase of the number of trips during the year at the expense of their duration and a special sensitivity to the issues associated with the natural and social environment.

From various reports, analyses and prognoses, there emerges an image of a “new tourist”. As it turns out, the latter is more experienced in his travels, finds it easier to “adjust” to the conditions in the places he travels to and is more aware of his own needs. Moreover, the “new tourist” is better educated, and is quicker to learn (e.g. from the mass-media). He does not discover the world (anew), but wants to confirm his knowledge of the world with his trip. The “new tourist” will need more entertainment and more adventure, but he will also have greater possibilities to satisfy all of his costly needs.

It will also be a tourist with a different system of values, professing the principle of “to be and not to have”, a tourist who is sensitive to the environment and looks for naturalness and authenticity. In accordance with the spirit of the age, he will accept cultural differences, will be more open and tolerant and will respect local customs, culture and religion; he will always be ready to interact and make new acquaintances.¹

The modern lifestyle has changed and the “new tourist” has become more affluent and at the same time, he has more free time at his disposal. He leads a healthier, more active lifestyle, practicing sports and taking advantage of various forms of recreation. The flexible working hours allow him to go on many more such short trips. Travel is treated by him as a way of life, an opportunity to learn, to attain self-fulfillment and spiritual development.

The demographic features of the “new tourist” have also undergone change; a typical tourist is a member of an aging community whose members set up family at a more mature age. The preferred family model (2+1) allows them to engage in more intensive tourist activities. In many cases, the tourist is a single or childless person.

One may assume that the “new tourist” will be more spontaneous, but at the same time that he will be more focused on consumption, more unpredictable till the very end, a person who does not plan vacations until the very last moment. It is often a person who wishes to be “somebody” during the holidays, a person

¹ Z. Kruczek, *Nowa turystyka i nowi turyści. Wyzwania XXI w. dla pilotów i przewodników. Trendy i tendencje w turystyce XXI w.*, in: *Jakość usług w pilotażu i przewodnictwie*, Materiały z IV Forum Pilotażu i Przewodnictwa, Proksenia, Kraków 2009, pp. 7–12.

who wants to get noticed in the crowd. To all that one should add an interest in quality (an expectation to obtain the best possible quality for a reasonable price).

Therefore, what sort of tourist guide and tour manager does the “new tourist” expect? The conclusions from the above analysis may be addressed to three major professional groups: local tourist guides, tour managers (on so called roadshow tours and shuttle trips) as well as tour resort representatives.

The local tourist guides will be expected not only to display an expert knowledge of their own territory, but also an ability to select suitable information for each particular group of tourists. The accepted standard involves a high level of service – guided tours are a “tourist service”; a customer “pays and demands a high quality service”. The basis of this service will be thorough care of the tourists, taking into consideration their safety and comfort while on tour. It will be advisable to combine guided tours on one’s territory with other abilities, e.g. belonging to the scope of active, cultural tourism. The future tourist guide will be expected to possess the ability to go beyond the level of ordinary information, and to be able to master the principles of interpretation of the phenomena and landmarks which he/she is commenting on. The “new tourist” is well educated and prepared to the trip (“erudite” tourist); he often asks difficult and troublesome questions; therefore the tourist guide must be “better than him”, both as regards the knowledge of the destination and the multi-layer interpretation of the questions he had been asked. The growing popularity of cultural tourism offers a chance for the development of the market of local guides’ services.

As regards tour managers, apart from the obvious knowledge of the principles of customer care, one often hears that they need to specialize both in the different forms of tourism and in various destinations.² Tour managers are expected to be able to follow the latest trends in the motifs and forms of travel as well as the changing preferences of tourists. Both tour managers and local representatives of travel agencies are a visiting card of the tour organizer and their work influences directly the quality of the provided service as well as the overall opinion of the tour in the eyes of the tourists.

² *Specjalizacja i profesjonalizacja we współczesnym pilotażu i przewodnictwie*, Z. Kruczek (ed.), Materiały z VII Forum Pilotażu i Przewodnictwa, Proksenia, Kraków 2012.

2. Liberalization of professional regulations and the protection of the local job markets

In Europe there operate three models of qualifications for tourist guides:³

Model 1.

This model is based on a set of restrictive legal regulations which impose on persons providing tourist guide services the obligation to possess qualifications granted by the state, whereas performing tourist guide tasks without such qualifications is considered to be illegal. This model has been adopted by many countries throughout the world, including some European states. Following the recent deregulation, according to the Polish law, it is only a mountain guide who has remained in the group of regulated occupations.

Model 2.

It is a model which requires qualifications for performing tourist guide tasks in certain strictly defined places – in most cases, museums or historical sites. Such licenses are granted on the basis of state examinations, examinations before an organizer of training, or before the management of a given site /landmark/. Such a model has been adopted e.g. in Russia, France or Great Britain as well as in the Czech Republic.

Model 3.

This model is based exclusively on the principle of a free market and freedom to provide tourist services, where performing tourist guide tasks is not legally regulated and it does not require from potential guides the need to obtain licenses or pass any examinations. In this system, there only exist voluntary tourist guide associations which organize training courses, create standards, give a certain prestige to the trade and offer technical support to their members. Such a system has been adopted, among others, by Holland and Germany.

³ K. Sobierajska, *Europejskie tendencje w kształtowaniu przewodnictwa i pilotażu w Polsce*, in: *Przewodnictwo turystyczne i pilotaż we współczesnej Europie*, 2 Międzynarodowy Sejmik Przewodnicki, Sopot–Gdańsk 18–20 May 2011, Oddział Gdański PTTK, Gdańsk 2011, pp. 21–28.

As regards tourist guidance, we come across different kinds of guidance, depending on the country and the local tradition. And thus, we distinguish the following types of tourist guide services:

- mountain, recreational, sports and tourist (Czech Republic),
- tourist movement guides employed by specific travel agencies, culture oriented and local guides showing visitors round historical and cultural monuments, mountain guides, cave guides in the case of caves made accessible to the general public (Slovakia),
- national guide-lecturer, national guide, regional guide, city and regional guide-lecturer, art and history guide, cultural heritage animator (France),
- guide: urban, museum, field, mountain (Germany, Poland).

Mutual recognition of tourist guide qualifications as well as the freedom to practice the trade in the individual member states are ensured by the existing regulations. In this context, one should mention directive 1999/42/EC (the so called “third” one) concerning training principles, the recognition of professional qualifications and providing services in EU countries and directive 2005/36/WE concerning the recognition of professional qualifications (including those of tourist guides and tour managers).⁴

According to the principles introduced by the above-mentioned directives:

- Performing the duties of a tourist guide on a permanent basis in a different member state from the one where a given person obtained tourist guide qualifications, requires the fulfillment of the conditions which remain in force in a given state; in the case where one of the above-mentioned conditions is possession of necessary qualifications (license) – when assessing the fulfillment of these conditions by a foreigner from another EU member state, one should take into account the qualifications acquired by this person in the EU member state from which he/she comes from; in the case where significant differences are observed, the potential tourist guide should be given a chance to supplement his knowledge by either being granted an internship placement or by passing a skills test;
- A temporary – cross-border license requires only notification of the appropriate authorities in the EU member states.

⁴ H. Zawistowska, *Przewodnictwo turystyczne w prawodawstwie unijnym*, in: *Przewodnictwo turystyczne w prawodawstwie polskim i europejskim*, Materiały seminaryjne. Biblioteka Górskiego Centralnego Ośrodka Turystyki Górskiej, T. 16, Kraków 2011, pp. 18–35.

The ongoing deregulation of the tourist guide profession in the EU member states

In recent years, on the territory of EU member states, we have been observing a process of gradual abandonment of regulations relating to the tourist guide profession. Deregulation had first extended to tourist guide services on the territory of the Czech Republic and subsequently to those in Greece and Poland. At the present moment, a tourist guide as a regulated profession operates on Cyprus and Malta as well as in Hungary, France, Spain, Lithuania, Rumania, Austria and Italy. As can be seen, the local job market on the territory of the EU is protected by regulations, chiefly in the receiving countries (Italy, Spain, France); such an approach also tends to be the norm in non-European countries (Turkey, China, the Caribbean etc.).

The European tourist guide training and qualifications norm (PN EN 15565) also constitutes a certain form of regulation which defines the educational programs of tourist guides, although it does not have an obligatory character. Yet the very fact that it exists should make one take into consideration the solutions proposed in it while preparing the Polish model of tourist guide instruction.

At the initiative of the Ministry of Sport and Tourism, in the year 2014, work has begun on the so called sector European Qualifications Framework for careers associated with tourism. The above framework sets out to define the necessary knowledge, skills and qualifications for all careers associated with gastronomy, hotel services and tourism, including those of tour managers and tourist guides. The above qualifications will be ascribed to a suitable level of the European Qualifications Program; the diplomas and certificates issued by the EU member states will contain all the appropriate information which should make it possible to compare them and mutually recognize them on the territory of all the member states.⁵

3. Tour managers in the EU

According to the Polish legal system, apart from a tourist guide there exists the profession of a tour manager. In many countries tour managers operate

⁵ *Europejskie Ramy Kwalifikacji w obszarze sportu i turystyki*, Konferencja Ekspercka, Ministerstwo Sportu i Turystyki, Instytut Badań Edukacyjnych, Toruń 2011.

on an informal basis as no state licenses for tour managers are granted; in most cases, the activity of tour managers /leaders/ is not defined by any regulations and neither a system of tour manager instruction nor of obtaining qualifications and licenses has been legally defined. As regards the performance of tour manager tasks, there is complete freedom for providing these types of services. Only a few countries have specific legislation which defines the legal status of this type of activity, among them Austria, Slovakia, Italy and Denmark.

The European Committee for Standardization CEN has ascribed appellations in English, French and German for the equivalent of the Polish 'tour manager'. In English the equivalent appellation is *tour manager* (or else *tour leader, tour escort*). In French the equivalent name is *directeur de circuit, accompagnateur* and in German *reiseleiter, reisebegleiter*. In Slovakia they use the name *technický sprievodca*, and in Russian a tour manager is referred to as *gid-pierewodczik*.

In Germany, the profession of a tour manager does exist, yet it is not regulated; it is more of a function within the tourist services sector. An agency which specializes in the training of tour managers is the German Federal Tourism Association and the Higher School in Bremen. The persons who have completed the training obtain certificates which confirm their qualifications, whereas subjecting oneself to the process of certification is voluntary. The training program puts emphasis on organizational skills, the ability to control the obtained benefits, the ability to settle claims and solve conflicts, the knowledge of legal regulations, as well as general communication skills. All of the above elements are treated on a par with the knowledge of a given country or countries. The acquired certificate of the Federal Association of the German Tourism Industry is valid for 3 years and its validity may be further extended after the candidate proves his/her professional activity. The Association also issues its own membership cards whose validity may be extended, and in the case of professional malpractice they may be taken away, following a strictly defined procedure.

The function of a tour manager does exist in France and is referred to as "*guide accompagnateur*", that is a person accompanying tourists during a tour. The requirements of travel agencies with regard to such persons are very high and the ones who get employed are usually those who have university diplomas, not infrequently Ph.D. degrees.

In contrast to the functioning supra-national travel guide associations, such as for instance the World or European Federation⁶, tour managers do not have such a form of association.

For although an International Organization of Tour Managers⁷ does operate in London, its range of activity is rather limited. Among others, it issues certificates to tour managers after they have completed training or a course of studies in Holland and once they have passed a suitable examination. What is definitely missing within the structure of the London branch of IATM is the “CE Europe” region. Therefore it may be advisable to create such a center in Poland for the countries of Central and Eastern Europe; it should be possible to organize it within the Visegrád Pact and finance it from its funds. Yet it would require cooperation between tourism faculties of various universities as well as associations of tour managers, so as to submit suitable applications.

4. The project of tour managers certification in Poland

deregulation should be taken advantage of to introduce fundamental changes into the system of assessing professional competence, so as to make it more suited to the present-day knowledge regarding the management of human resources. Certification seems to be a necessary step in the tourist sector, particularly after the implementation of the deregulation of certain professions. For the Act of 13 June 2013 concerning a change of legal acts regulating certain professions assumes that as of 01.01.2014, a person performing the tasks of tour manager should meet three rather banal conditions, namely:⁸

- he/she should be of age (18 years)
- he/she should not have a criminal record (for a voluntary or another type of offense, committed in connection with the exercise of tasks associated with the occupation of tourist guide or tour manager)
- he/she should have completed at least a secondary school education.

⁶ European Federation of Tourist Guide Associations in Vienna – www.touristguides-europe.org, Vienna; The World Federation of Tourist Guide Associations in London – www.wftga.org.

⁷ IATM (International Association of Tour Managers Ltd.), <http://iatm.co.uk>, 397 Walworth Road, London SE17 2AW.

⁸ Dziennik Ustaw, 23.07.2013, p. 829.

Whereas the tasks of a tour manager, as defined in the Act on tourist services remain unaltered, they are associated primarily with taking care of tourists within the scope defined in the contract, supervising the way services are provided to clients in the name of tourism organizers, accepting complaints from dissatisfied customers and relaying to their employers the fundamental information concerning the country and place they have visited.⁹

A tourism organizer who makes a decision to employ a given tour manager must be sure that he entrusts the plight of his clients to a suitable person who is able to ensure safety during the tour and correctly realize its program. Therefore employing a competent and well-qualified tour manager gives a sense of security also to the organizer himself. For the qualifications of a tour manager condition the way in which the tasks defined in the Act on tourist services are realized, and in this way they exert a direct impact on the level of the service which is being provided.

The best signal for a tourism organizer that he is dealing with a competent tour manager is a document which informs him about the tour manager's qualifications. Up until recently, it was a tour manager's ID card issued by Marshall's Offices and formerly by Provincial Offices that constituted such a document. Despite deregulation, these licenses will continue to be a form of confirmation for tourism organizers that tour managers they have selected possess suitable qualifications. In a situation when state regulations ceased to operate as of 1 January 2014, there arises the need for implementing a system of certification which will to some extent substitute the previous regulations. Tourism organizers will presently face the challenge of having to carry out a selection of bona fide service providers (tour managers); it is by no means an easy task, particularly in the case of small and medium-size travel agencies. For if up until the end of 2013, the competence of tour managers was verified time and time again in the course of internal examinations organized during training courses, by state examinations and the recruitment process organized by the tourism organizer, at the present moment, the assessment of tour managers' competence will be confirmed exclusively by the future employer.

The project of the Polish Chamber of Tourism, prepared in cooperation with the Polish Federation of Tourist Guides and Tour Managers assumes a far-reaching standardization of the way of assessing candidates for tour managers.

⁹ Dziennik Ustaw z 2014 poz. 196.

The certificate which will be issued to future tour managers will constitute an objective, bona fide confirmation of their professional competence and skills based on the same, universal criteria.

The main principle of the project consists in the concept of checking the practical abilities of candidates for tour managers, rather than the previously applied concept of checking exclusively their theoretical knowledge. The project also assumes the introduction of standardized ways of evaluating candidates for tour managers. The certificate which will be issued to them will therefore constitute an objective and genuine confirmation of their professional competence and their assessment will be based on the same criteria.

It is assumed that professional competence, conforming to the prepared competence profile of a tour manager, will be verified, among others, on the basis of the method of an assessment center. The innovative element of this method consists in an evaluation based on the completion of tasks. During the examination, the examiners observe the candidate's abilities to apply theoretical knowledge in situations which are directly associated with the performed trade. In the processes of certification, one moves away from verifying exclusively one's knowledge; what counts is the ability to apply knowledge in practical situations.

The introduction of uniform standards of verification in the entire country, will contribute to greater standardization of the method of final assessment of candidates to the trade, and therefore, it will provide more exhaustive information for tourism organizers concerning the level of the candidates' preparation to the trade of tour manager.

Conclusion

Undoubtedly, the changes which are currently taking place in tourism will force the associations of tourist guides and tour managers to introduce new solutions. The new forms of communication, the new media and the general accessibility of the Internet will result in a decrease of the need for classical tourist guide and tour manager services. Thanks to the existing applications, the information about tourist attractions as well as practical information about tourist services is now available on smartphones, and through QR and NFC codes. The technology of extended reality allows one to identify tourist landmarks in space. The number of gadgets which facilitate travel and provide tourists with useful information

at any given moment is constantly growing. In museums and other institutions where visitors have to purchase tickets, information is mostly generated by electronic audio-guides; the latter are becoming somewhat of a standard on guided-tours round well-known landmarks. Young tourists who are well-accustomed to modern technology will definitely make less use of tourist guide services.

The classical guided tours offered to groups of tourists will constitute a sophisticated, high-level service which will be offered to selected groups. Guided tours will be decidedly more attractive in form and will often be combined with various innovative forms such as dramatized tours, special interpretation or urban games.

At this point, it is only natural to ask whether all of these electronic gadgets will one day be able to substitute a real, flesh and bone local guide? According to Armin Mikos von Rohrscheidt, there are certain areas of a tourist guide's trade which no machine is able to stand in for. Thus, for instance, in the course of sightseeing, tourists may have all kinds of questions and they may either not be bothered to look for answers to them among the thicket of available texts and presentations, or else they may simply prefer to ask a living guide. Only a living guide is able to ensure an authentic encounter with the place and discuss various topics associated with it, emphasize certain unique values. He then becomes a representative or the remembered "face" of a given place. For many tourists, an excursion is a chance to liberate themselves from electronic gadgets which have taken control of our everyday life. There will therefore arise a need for real-life encounters, for interactions with living people who are able to talk about their surroundings – "here and now", and not for places enclosed in texts and images.

A well prepared, modern guide who is equipped with the necessary sociological and psychological knowledge is able to serve his client in a much better way. He is able to change the program of sightseeing in a flexible way, so as to adjust it to the tourist's individual interests. He may become an invaluable culinary adviser or else a shopping consultant advising his clients on how to make original purchases. One should also mention combined services, e.g. a guide hired together with the car, that is in a double role of driver and guide, or else a guide realizing a thematic order, when a guide assumes the role of a historical figure in dramatized tours. The individualization of tourism also gives guides a chance: for although a smaller percentage of tourists will probably make use of their services (some of them will unavoidably become immersed in their smartphones), this may result in an increase of the absolute number of com-

missions. For orders will not be realized for huge, several-dozen strong groups of tourists brought on site by coaches, but will rather consist of individual tourists or small, private groups of tourists who stay in a given hotel and learn about the guide's offer from leaflets displayed in the hotel reception or else in the hotel room; such tourists often decide to join hands and take advantage of the guide's offer, so as to reduce the costs.

Yet this will require a change of mentality of the guides themselves; the ones who will survive on the changing market will be those who will be able to adjust to the changes. Changes in the very methodology of a tour guide's work are also expected, the guides will have to alter the structure of their narration. They will have to focus primarily on what the tourist wants and what brings him the greatest pleasure and satisfaction. The guides will have to change the scope of their services as well; they will be forced to become advisers and shopping experts. They will have to enter into cooperation with hotels and guesthouses. They will also have to change the rhythm of their work, e.g. they will have to take orders placed on the same day and not in advance. They will have to alter their typical "didactic" approach by limiting the role of the so far immortal lecture-monologue.¹⁰

As regards tour managers, it is expected that they will skillfully adjust themselves to the new organizational structures and that they will obtain adequate competence skills comparable to the ones that are recognized in other EU countries and on other outbound tourist markets. The process should be facilitated by the European Qualifications Framework for careers associated with tourism.

In this context it ought to be mentioned that invariably a professional knowledge of the principles of customer care is of particular value here as it decides about success at work. Among some of the other factors which may be useful in the search for employment and orders, one should mention specializations in both the various forms of tourism and destination places, as well as attempts to look for niche employment opportunities. Tour managers should be characterized by the ability to keep up with the changing trends both as regards destinations and forms of travel as well as the changing preferences of the tourists who are being catered for. This requires permanent self-improvement in the form of participation in organized training sessions and self-study efforts.

¹⁰ I quote fragments of Armin Mikos von Rohrscheidt's opinions published in the journal "Turystyka Kulturowa", www.turystykakulturowa.org, No. 12/2013 (December 2013), p. 96.

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**PILOTAŻ I PRZEWODNICTWO TURYSTYCZNE W POLSCE.
DEREGULACJA I NOWE WYZWANIA****Streszczenie**

Wraz ze zmianami jakie zachodzą w światowej turystyce zmieniają się również role społeczne i zawodowe przewodników turystycznych. Zainicjowana w krajach Unii Europejskiej deregulacja zawodów przewodnika turystycznego i pilota wycieczek kontrastuje z ochroną przewodnickiego rynku pracy w większości krajów poza UE. Utrzymanie na przyzwoitym poziomie jakości usług przewodników lokalnych a także pilotów wycieczek w krajach UE, w związku z deregulacją tych zawodów, skutkuje wdrażaniem branżowych systemów certyfikacji. Tak sytuacja ma miejsce obecnie w Polsce. W artykule omówiono zmiany zachodzące w turystyce wraz z identyfikacją ich skutków dla przewodnictwa i pilotażu, modele funkcjonowania przewodnictwa w światowej turystyce a także zaprezentowano założenia certyfikacji pilotów wycieczek i przewodników turystycznych w Polsce.

Słowa kluczowe: przewodnik turystyczny, pilot wycieczek, deregulacja, kwalifikacje, certyfikacja