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The Directions of Shaping the Regional Tourism Policy in View of the Use of The European Union Funds

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**THE DIRECTIONS OF SHAPING THE REGIONAL
TOURISM POLICY IN VIEW OF THE USE
OF THE EUROPEAN UNION FUNDS**

Abstract

The paper concerns issues of developing tourism policy at the regional level. The main objective of the paper is to present theoretical problems of regional tourism policy, indicating the possibility of its support in the financial perspective for 2014–2020 from the European Union funds in selected Polish regions. European Union funds are means of regional tourism policy and they also shape the state of development of regional and local tourism economy. The research will result in recommendations concerning regional tourism policy in the EU financial perspective 2014–2020.

Keywords: regional policy, tourism economy, tourism policy, EU funds

Introduction

The main part in the implementation of the tourist function at the regional level belongs to local authorities. Thanks to legal regulations, they become the subjects of tourism policy and receive a number of means which shape functioning of regional tourism economy. In Poland, regional authorities are in charge of regional tourism policy and they are responsible for determining regional strategy for tourism development. The key means of regional authorities activity are European funds which through regional operational programmes affect certain

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fields of the social and economic life in the region, including tourism. The primary objective of this paper is to present theoretical problems of regional tourism policy, indicating the possibility of its support in the financial perspective for 2014–2020 from the European Union funds. There were shown the possibilities of the regional authorities to be not only the subject of the regional tourism policy, but also the active subject of tourism economy. The research will result in recommendations concerning regional tourism policy in the EU financial perspective 2014–2020.

1. Tourism economy

The whole sphere of activities, facilities and resources designed to meet the needs created by tourists is called tourism economy. It is “... a set of various economic and social functions, directly or indirectly developed to meet the growing demand for tourist services”.² This definition emphasizes the complexity of the tourism economy and its close relationship with the process of the tourist consumption.³ In the systematic approach tourism economy is defined as a system of interdependencies that may arise between institutions and organizations that are involved in a process of meeting the needs expressed by tourists.⁴ This system includes all measures to meet tourism demand, from changing natural environment to the needs of tourism up to the creation of conditions for tourism development.⁵ Tourism economy manifests itself in all areas of management: the production of goods and services, their distribution, exchange and consumption; it is also found in most sectors of the national economy, operations of which more or less influence, directly or indirectly, meeting the tourist demand.

In the classic approach tourism economy consists of direct and indirect tourism economy. The criterion of assigning entities’ activities to each of the groups is the degree of activity’s indispensability for servicing of tourism movement

² W.W. Gaworecki, *Turystyka*, PWE, Warszawa 2003, p. 161.

³ A.S. Kornak, A. Rapacz, *Zarządzanie turystyką i jej podmiotami w miejscowości i regionie*, Wydawnictwo Akademii Ekonomicznej im. O. Langego we Wrocławiu, Wrocław 2001, p. 11.

⁴ A. Nowakowska, *Gospodarka turystyczna w ujęciu systemowym*, “Folia Oeconomica Cracoviensia” 1988, Vol. 21.

⁵ G. Gołębski (ed.), *Kompendium wiedzy o turystyce*, Wydawnictwo Naukowe PWN, Warszawa–Poznań 2002, p. 135.

and the importance of an activity to tourism for a given entity. The development and changes in the sphere of tourism caused the additional division of tourism economy into usual and complementary. Direct tourism economy (the tourism industry) includes activity of only those subjects which functioning results from meeting the needs reported by tourists.⁶ Usual tourism economy covers above all: hospitality, catering, passenger transportation, travel agencies, companies that operate tourist attractions and tourism information. Complementary tourism economy covers activities in the production of goods and services, companies among other producing sport equipment, trade of products aimed at the tourism market, activities of cultural-entertaining and sport-recreational facilities. The significant scope of activities concerns functions conducted by local authorities and activities of tourism organizations. Indirect tourism economy is the activity of these organizations which respond to the needs expressed by different groups of people (tourists, inhabitants of tourist regions) and that do not create typical and characteristic tourist products,⁷ e.g. in the field of banking and insurance sector, trade, post and telecommunication, public utilities.

From the point of further dissertation, it is necessary to narrow down to direct usual tourism economy since these subjects are potential beneficiaries of EU resources for tourism economy. Among the mentioned types of tourism economy activities, there are tourism enterprises which through their services create an offer in the tourist field. A tourism enterprise can be characterized as a purposefully organized, economically independent and distinguished in technically service, spatial and legal respect team of people, material and financial resources, appointed to conduct a certain business activity (through providing tourist services) in the scope of meeting the needs (existential) of travelling people (and not only) in the sphere of tourism and in a way that allows the enterprise to maximize its benefits.⁸ Therefore, it is an organizational unit conducting a business activity based on chargeable providing of services for participants of various types and kinds of tourism.⁹

⁶ N. Leiper, *The Framework of tourism: Towards a definition of tourism, tourist, and the tourist industry*, "Annals of Tourism Research" 1979, Vol. 6, Iss. 4, pp. 390–407.

⁷ S.J. Page, J. Connell, *Tourism a modern synthesis*, Thomson Learning, London 2006, p. 53.

⁸ A. Rapacz, *Przedsiębiorstwo turystyczne. Podstawy i zasady działania*, Wydawnictwo Naukowe PWN, Warszawa 1994, p. 19.

⁹ A. Rapacz, *Przedsiębiorstwo turystyczne na rynku*, Wydawnictwo Akademii Ekonomicznej im. Oskara Langego we Wrocławiu, Wrocław 1998, p. 15.

2. Regional tourism policy

The condition for the effective operation of tourism economy subjects at the regional level is the development of the cooperation system between:

- a) bodies conducting business activity (tourism enterprises),
- b) voivodeship authorities,
- c) organizations and tourism industry associations, including economic authorities,
- d) regional tourism organization.¹⁰

A country and its authorities play the regulatory role in the processes of tourism economy.¹¹ Tourism policy is an activity which determines economic, political, social and cultural objectives connected with tourism development, achieving versatile positive effects which result from the existence of demand and supply, trying to meet the social needs in terms of tourism and specifying essential means to do that.¹² The strategy for carrying out economic politics should be based on creating and protecting conditions, so that the mechanism of automatic adjustment of supply to demand through prices, that is market, works. However, it requires the protection of property law and the settlement of disputes over contracts and also the existence of many independent producers, well-informed and well-protected customers, free price formation, free entrance and exit from the given market. Creating such conditions requires many regulations and public institutions.

According to the division of tasks of public administration at the national and regional level, the primary institution responsible for tourism policy at the regional level in Poland are voivodeship authorities (the voivodeship board and the voivodeship assembly). The basic objectives of tourism policy are:

- fulfilling the tourism needs of a society,
- reasonable use of tourist attractions and labour and capital resources in the sphere of tourism economy,
- development of the optimal size and structure of tourism movement,

¹⁰ A. Panasiuk (ed.), *Gospodarka turystyczna*, Wydawnictwo Naukowe PWN, Warszawa 2008, p. 25.

¹¹ L. Pender, R. Sharpley (ed.), *Zarządzanie turystyką*, PWE, Warszawa 2008, p. 270.

¹² S. Wodejko, *Ekonomiczne zagadnienia turystyki*. Wyższa Szkoła Handlu i Prawa, Warszawa 1998, p. 170.

- coordination of tourism development which takes into account its various features and links with other areas of economy.¹³

Regional authorities are a tourism economy entity which is, on the one hand, a sub-system of national government and, on the other hand, a type of civil society organization.¹⁴ From the point of regional tourism economy, regional authorities through their activities protect functioning of this economy.

A cooperation platform for voivodeship authorities and entrepreneurs and tourism organizations in voivodeship is the regional tourism organization. This is the most advanced form of cooperation between all entities interested in tourism development in the spatial aspect. In practice, it creates a direct support for the voivodeship authorities in the implementation of tourism policy.

3. Instruments of regional tourism policy

Activities conducted by the voivodeship authorities result from regulations in three basic legal acts: tourism services act,¹⁵ voivodeship government act,¹⁶ Polish Tourism Organization act.¹⁷ The activities of voivodeship authorities under the regulations of the aforementioned legal acts related to tourism are as follows:

1. Formulating of a strategy for tourism development.
2. Current tourism policy:
 - influences on tourism development,
 - improvement of competitiveness of tourism products,
 - natural environment protection,
 - culture,
 - monuments protection,
 - land planning in the area of tourism,
 - consumers rights protection,

¹³ W. Kurek (ed.), *Turystyka*, Wydawnictwo Naukowe PWN, Warszawa 2007, p. 388.

¹⁴ A. Miszczyk, M. Miszczyk, K. Żuk, *Gospodarka samorządu terytorialnego*, Wydawnictwo Naukowe PWN, Warszawa 2007, p. 29.

¹⁵ *Ustawa z dnia 29 sierpnia 1997 roku o usługach turystycznych*, (tekst jednolity), Dz. U. 2004, nr 223, poz. 2268.

¹⁶ *Ustawa z dnia 5 czerwca 1998 roku o samorządzie województwa*, Dz. U. z 2001, nr 142, poz. 1590.

¹⁷ *Ustawa z dnia 25 czerwca 1999 roku o Polskiej Organizacji Turystycznej*, Dz. U. nr 62, poz. 689.

- acquisition of funds for tourism development,
 - cooperation with tourism industry,
 - cooperation on creating tourist offers,
 - euroregional cooperation on tourism,
 - tourism promotion,
 - regional tourism information system.
3. Tasks assigned by the national government:
- keeping record of regulatory activities of tourism operators and middlemen,
 - classifying hospitality facilities into the particular type and category,
 - issuing of the authorization to give training for candidates for tour leaders and tour guides,
 - giving language qualifications and issuing of ID badges for tour leaders and tour guides.

Voivodeship authorities' activities are crucial in creating regional tourism products that combine services of individual providers of direct tourism economy and para-tourist services in the tourist region. By specifying location of tourism in the structure of the regional economy, particularly through the creation of the tourism development strategy, cooperation and integration of tourism sector, there is a possibility of activating economy at this level and creating new workplaces.¹⁸

Activities of voivodeship authorities, thus creating regional tourism policy, lead to the diversity of particular voivodeships in terms of political style and its actual influence on tourism economy development. Voivodeship authorities use both active and passive instruments of tourism policy affecting directly the level of tourism economy development. Some authorities limit themselves solely to using passive administrative instruments, e.g. tasks assigned from the scope of government administration operations, which means a reluctant, conservative or only declarative attitude to tourism economy development. In consequence, it determines the low level of tourism economy development. Such activities of voivodeship authorities result from the conviction that an attractive tourist area is a sufficient base for retaining a position in the tourism market. Passive instru-

¹⁸ A. Rapacz, *Aktywność jednostek samorządu lokalnego na rzecz wspierania przedsiębiorczości firm turystycznych*, in: *Turystyka w ujęciu podmiotowym i przestrzennym. Człowiek-Przestrzeń-Przedsiębiorstwo*, G. Gołębski (ed.), Wydawnictwo Akademii Ekonomicznej w Poznaniu, Poznań 2006, pp. 296–299.

ments maintain the state of tourism economy at the same level, however, they do not develop economy and in the long term they lead to limiting the role of an area as a tourist destination. The steady and progressive development of tourism economy is guaranteed by activating of authorities into protourist initiatives with the use of active instruments. The principal premise for these activities being successful is an active cooperation between institutions (appointing and cooperating with regional tourism organization, supporting cluster structures), the involvement in investment through one's own resources and EU funds and the influence on creating local and regional tourism products.

The key task of the regional tourism policy should be constituted by actions directed to direct providers of tourism services that determine the actual income arising from servicing tourism movement, i.e. to the tourism industry. The scope of the government policy in relation to the tourism industry is a derivative of a general economic policy. Tourism economy entities are beneficiaries of the policy, similarly as other entrepreneurs in the market. Among the tasks addressed in relation to tourism enterprises, one can distinguish following aspects:

- encouragement of the development of tourism infrastructure,
- creation of conditions for the modernization of the material base of tourism,
- stimulating actions that improve efficiency of tourism enterprises,
- state aid (including grants),
- institutional support and investment.

4. The evaluation of actions of regional tourism policy entities in terms of EU funds use

Local authorities have a decisive role in implementing tourist function at the regional and local levels. Direct tourism economy entities, especially tourism entrepreneurs, conduct activities within the scope of providing tourist services. Cooperation between local authorities and tourism industry entities is a base for tourism economy operations, and thus implementation of synergy effects. The use of EU funds is an active instrument of local authorities actions that enables a comprehensive development of tourism economy. Activities within that scope should be undertaken both independently by local authorities, but also in cooperation with tourism organizations and enterprises.

Comprehensive research¹⁹ showed that the main beneficiaries of EU funds for tourism economy are local authorities.²⁰ Whereas tourism entrepreneurs mainly benefit from a dedicated support for business entities from SME sector.

From entrepreneurs' point of view, it appears that during the financial perspective 2007–2013 the activity of municipal authorities was limited to carrying out initiatives related to EU financing of tourism projects independently, without a will to cooperate with tourism entrepreneurs. Hence, the cooperation in terms of development of local tourism products was rather limited and the development needs of tourism entrepreneurs were almost not seen.

5. Recommendations for the tourism development strategy in financial perspective 2014–2020

The issue of changes in terms of facilitating awarding EU funds that were suggested by tourism enterprises' representatives should be taken into consideration during the next EU's financial perspective. According to research, above all it is essential to introduce changes in the application settlement procedure (47% of recommendations), streamline the application structure (45%), reduce delays in reimbursement of expenditures (42%) and provide conceptual support from a financing institution (37%).²¹

Looking at the issue in a broader perspective, we should comment on the government strategic documents on a comprehensive development of tourism economy in which spatial aspects are emphasized. The priority areas of reinforcing the dynamics and harmonization of tourism development defined in *Directions for Tourism Development until 2015* encompass, as previously stated: the development of tourism products, human resource development, marketing support and the development of the tourist space. The main premise of this document was to approach tourism as a field strictly connected with nu-

¹⁹ A. Panasiuk, *European Union Funds in the Development of Regional Sustainable Tourism Economy in 2007–2013*, 2nd International Scientific Conference Tourism in South East Europe 2013, Rijeka 2013, pp. 267–277.

²⁰ A. Panasiuk (ed.), *Fundusze Unii Europejskiej w gospodarce turystycznej*, Difin, Warszawa 2014.

²¹ Ibidem.

merous development processes and to shape it in tune with other socio-economic development objectives of the country. The implementation of the document's principles was supposed to support building strong foundations for tourism economy, increase the competitiveness of Polish tourist offer in the domestic and international markets, and use tourism as an important factor that would support entrepreneurship. However, the referred strategic document practically did not point to particular actions connected with using EU funds for the development of a typical direct tourism economy. It is expected that, for the upcoming EU financial perspective, a government department responsible for tourism will prepare a new document for the period until 2022, which will be then accepted by the government. Such document should explicitly point out what the strategic activities of the country in terms of tourism economic are, where funds from European Union's support should be allocated to. The following main areas of support should be listed:

- the development of passenger transport system that would focus on the needs of tourist movement (especially rail and air transport), although these activities are outside of the Ministry of Sport and Tourism's competences, but the ministry should cooperate with the ministry responsible for infrastructure;
- impact on the development of the tourist space, including the development of tourist facilities that would extend the tourist season and create new forms of tourism;
- actions directly aimed at tourism entrepreneurs and the development of tourist offer;
- actions aimed at tourist demand that would be mainly connected with social tourism and financing tourism of social groups (seniors, children and teenagers, disabled people); mobilisation of some social groups would increase the volume of use of tourist base and directly influence the results of the tourism industry.²²

The most crucial aspect of EU support for tourism economy pertains to the regional level. The basic source of financing are regional operational programmes. Available data show that in the next financial perspective there will not be any actions directly dedicated to tourism economy in the programmes. Additionally, financial support will be limited to about 50% of planned costs

²² A. Panasiuk, *Rynek turystyczny. Studium strukturalne*, Difin, Warszawa 2014.

of tourism projects. It means that the beneficiaries will have to obtain larger own contribution for tourism projects. Such change will probably reduce the number of applications for tourism economy objectives filed by local authorities. Lack of clear emphasis of support for tourism objectives does not mean that tourism economy entities will be excluded from EU financing. However, it will be harder to indicate priorities related to the development of tourism economy in operational programmes. The issue of coexistence of tourism and culture will also become marginal. In previous financial perspectives, it limited the possibility of obtaining funds for strictly tourist objectives. The main scope of financing will, among others, include innovations and so called creative industries. It seems that there should be some mechanism functioning in this aspect and first of all there should be some special actions directed to direct tourism economy entities that were marginalized in the previous financial perspectives.

At the microeconomic level, strategies are developed by tourism enterprises. They have the most specified market scope, as they are a concrete action plans, and they formulate main objectives and response policy. Conducted analyses show that only to small extent were tourism entrepreneurs the beneficiaries of EU funds for their market activities. They were not also perceived as partners to cooperate with in terms of activities undertaken by local authorities. It seems that indicated EU financing priorities in the new financial perspective should favour entrepreneurs. Hence, local authority bodies that want to obtain financing through EU funds will more eagerly cooperate with direct tourism economy entities in order to realize joint tourism projects. Thus a broader implementation is to be expected in terms of public-private partnership in tourism economy. Therefore, an important issue that need model solutions is enabling access to financing of activities within the scope of the development of tourism economy by as large range of entities that created it as possible. Thus, entities that will have a possibility to apply for EU funds in terms of tourism projects should include:

- tourism enterprises,
- local authority bodies,
- tourism organizations.

Projects realized in cooperation by the abovementioned entities should constitute a special area of EU support. Then, EU funds will directly determine the development of tourism enterprises, as well as the whole local and regional tourism economy.

Conclusion

A synthetic summary of presented considerations shows that the basis for the development of regional tourism economy is developing tourism policy through making active instruments (economic, institutional) more prevalent than passive instruments (administrative and especially declarative) in the structure of local authorities' actions. This should be done while retaining essential range of obligatory activities that stem from the provisions of self-government law and the Tourism Services Act. Comprehensive cooperation is the base for effective operations of tourism economy. European Union funds managed by voivodeship government as part of ROP constitute an active formula for implementing regional tourism policy, which unfortunately is not completely effective.

Obtaining financing from EU funds should result in raising the tourist attractiveness level of areas. The scope of actions carried out in tourism economy, both in case of local authorities and tourism enterprises, determine the development of regional and local tourism economies of the two analysed regions.

It will be possible to propose actions necessary to change the structure of regional operational programmes and the tourism development strategy to authorities managing EU funds thanks to the conducted diagnosis of the tourism enterprises' engagement in applying for EU funds and the evaluation of EU funds use in tourism economy. One of the important problems is the issue of expanding the availability of EU funds for business entities (tourism enterprises – hospitality sector, transport sector, travel agencies and other entities responsible for available offer at tourist destinations). Higher percentage of tourism entrepreneurs that use EU funds should ensure a more dynamic development of tourist offer, tourism development and have a real influence on economic growth of regions, the labour market and the quality of life of inhabitants.

It should be emphasized that tourism economy contributes to socio-economic development of the country. Only active cooperation between local authorities, tourism organizations and tourism enterprises can result in expected effects that would be in line with implementation of provisions in strategic documents. The conducted research can be the basis for determining the objectives for the development of tourist areas and it should be the foundation for shaping actions for regional tourism policy for the next EU financing perspective, i.e. 2014–2020.

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**KIERUNKI KSZTAŁTOWANIA REGIONALNEJ POLITYKI
TURYSTYCZNEJ W ASPEKCIE WYKORZYSTANIA ŚRODKÓW
UNII EUROPEJSKIEJ**

Streszczenie

W referacie zostaną zaprezentowane zagadnienia kształtowania polityki turystycznej na szczeblu regionalnym. Podstawowym celem opracowania jest przedstawienie teoretycznych podstaw regionalnej polityki turystycznej wraz ze wskazaniem możliwości jej wsparcia w perspektywie finansowej na lata 2014–2020 ze środków Unii Europejskiej w wybranych regionach Polski. Fundusze Unii Europejskiej są instrumentem regionalnej polityki turystycznej a także kształtują stan rozwoju regionalnej i lokalnej gospodarki turystycznej. Efektem przeprowadzonych badań będą wskazania dotyczące regionalnej polityki turystycznej w perspektywie finansowej UE na lata 2014–2020.

Słowa kluczowe: polityka regionalna, gospodarka turystyczna, polityka turystyczna, fundusze Unii Europejskiej