

Mapping exercise:
How could creative industries foster innovation
in tourism in the Northern Dimension area?



Country Report – Poland



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LIST OF ABBREVIATIONS

Acronym/abbreviation	Meaning
CCI	Cultural and Creative Industry
CCS	Cultural and Creative Sector
EEC	European Economic Community
EU	European Union
FWC	Framework Contract
GDP	Gross Domestic Product
IT	Information Technology
NAC	National Digital Archives
ND	Northern Dimension
NDPC	Northern Dimension Partnership on Culture
NGOs	Non-Governmental Office
NSRK	National Strategy for the Development of Culture
OECD	Organisation for Economic Co-operation and Development
OTA	Online Travel Agency
PPP	Public-Private Partnership
SARP	Union of Polish Architects
SFP	Polish Filmmakers Associations
SME	Small and Medium Enterprise
UEFA	Union of European Football Associations
UK	United Kingdom
UNCTAD	United Nations Conference on Trade and Development
UNESCO	United Nations Educational, Scientific and Cultural Organisation
WTO	World Trade Organization
ZAIKS	The Authors Society
ZPAP	Polish Visual Artists Union

1. INTRODUCTION AND KEY COUNTRY POINTS

This is one of eleven reports on the countries of the Northern Dimension (ND) and should be read in conjunction with a twelfth 'regional/cross-country' report. The reports have been produced under the EU BENEf Lot 9 FWC contract 'Mapping exercise: How could creative industries foster innovation in tourism in the northern dimension area?', in line with the terms of reference for that contract. The reports follow what was agreed at the inception report stage. Throughout the period during which the work has been done there has been close and positive liaison with the executive of the Northern Dimension Partnership on Culture (NDPC). The reports that have been produced are based on extensive consultation and research involving a large range of people. These people included country specialists and officials to whom we are very much indebted.

Under the terms of reference the timetable for the work started in February 2016 with completion scheduled for December 2016. The allocation of time for the work was 105 days, split between the two team members, 55 days for Lila Skarveli and 50 days for Terry Sandell, the Team Leader¹. Given the number of countries, and their diversity, and given the very wide subject matter involving three very dynamic and currently fashionable areas - Cultural and Creative Industries, Tourism and Innovation - the time constraint was a very real challenge indeed. Amongst other things, it meant that while country visits of about five working days to all of the countries took place, it was physically only possible in most cases to visit one city, usually the capital. That said, every effort was made to secure a country overview which took into account at least some of the important developments taking place in the regions.

Quite soon after starting our work various interesting, sometimes challenging, questions arose, such as:

- Is there any reason why tourism itself is not considered one of the creative industries?
- In all three cases, the definitions of CCIs, tourism and innovation are various, unstable and contested. Is this because the necessary action to define them precisely and consistently at a European level has not been taken or is it because we are in a 'post-definitional' era with certain areas of human social and economic activity having become too diverse and complex to categorise easily?
- Tourism is a high priority for most Northern Dimension countries yet there were protests against tourism recently in Barcelona, arguably the most successful European city in terms of its tourism development and city brand. What does this signal about sustainability and local community engagement with/in tourism?
- When they do talk, do the tourism industry and the cultural and creative sectors speak the same language?
- Is the tourism industry's use of culture and heritage because of real engagement with the cultural and creative sectors or in spite of it? Even when they are moving in the same direction are they in reality on parallel but essentially separate tracks?
- Should tourism businesses be engaging with CCIs or vice versa, in which direction is the demand and in which direction the supply?
- Given that both sectors are to a large extent highly fragmented with a numerical predominance of SMEs, to what extent do the actors involved have the time and capacity to engage with each other innovatively or otherwise?

¹ Terry Sandell took responsibility for the Estonia, Finland, Latvia, Lithuania and Russian Federation reports and Lila Skarveli for the Denmark, Germany, Iceland, Norway, Poland and Sweden reports.

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- Do the bridges that need to be built between CCIs and the tourism sector include new intermediaries who can identify, interpret, broker and manage tourism-CCI/CCI-tourism synergies?

In the last couple of years there has been increasing interest in looking at the existing and potential linkage of the cultural and creative industries to tourism development. It however throws up considerable practical and methodological challenges and problems for various reasons and explains why relatively little progress seems to have been made. The major first hurdle is that the definition of cultural and creative industries is constantly evolving and, moreover, it differs from country to country². This has been particularly evident in the case of the eleven Northern Dimension countries, even in the case of those countries which work very closely together, for example in the case of Denmark, Norway and Sweden. There can also be conceptually quite different national approaches. For example in one country cultural and creative industries may be seen as a distinct sector and be supported on that basis. In another country they may not even be seen as a sector but as part of something wider or cross-cutting such as one part of the creative economy, or as a part of national innovation, entrepreneurship or SME policies. The third issue flows from the other two. Because of an evolving and differing understanding in country terms of what the CCIs constitute, there is no common statistical base which allows clear comparisons or benchmarking, something which is urgently needed and is beginning to start being explored at European level.

If one turns to the tourism sector, there are similar parallel problems. The collection of statistics (e.g. number of nights' accommodation) may be firmly in place but those statistics are partial and beginning to look increasingly inadequate as they are often not taking account of revolutionary changes affecting the tourism and travel industries. The continuing, growing importance of OTAs³ and an emerging peer-to-peer and sharing economy affecting such areas as traditional tourism accommodation are often not being captured by the traditional industry information systems.

Tourism categorisation is also constantly evolving with the existence of an increasing number of sub-sectors. Even cultural tourism, a sub-sector itself, can be broken down into possibly a dozen or more sub-sectors such as heritage tourism, arts tourism, creative tourism, urban cultural tourism, rural cultural tourism, indigenous cultural tourism, experiential and gastronomic tourism, 'dark' tourism⁴, often with overlaps with other forms of tourism e.g. adventure tourism, health and well-being tourism and so on⁵. Again there are definitional differences from one country to another and certain types of tourism may be more developed or be more of a national tourism priority in one country compared to another.

The complications of identifying at a general level the existing and potential linkage of CCIs to the tourism sector is exacerbated by certain tourism sub-sectors being in their own right part of the cultural sector itself, for example in the case of heritage tourism. Both the CCIs and the tourism sector are not in reality clearly demarcated - both are imprecise, fluidly-defined, fast-changing and dynamic areas of complex and important economic and social activity. In the case of CCIs there are other complications. For example the

² Committee on Industry, Research and Energy and Committee on Culture and Education of the European Parliament Draft Report (23 June 2016) 'On a coherent EU policy for cultural and creative industries' (2016/2072(INI): 'Alongside a clear definition that takes into account all sectors related to CCIs, the co-rapporteurs believe it equally necessary to have comparable and reliable statistical data. Each Member State has, in fact, its own classification of CCIs. It is therefore essential to adopt at EU level an updated framework for the sector and to map changes over time. The objective should be to identify specific indicators to measure the results of policies for the promotion of the sector.'

³ Online travel agencies (such as Expedia, Booking.com etc.)

⁴ Tourism in which visits are made to sites, attractions or exhibitions connected with suffering, death, disaster and negative or macabre events.

⁵ Melanie K. Smith in her 'Issues in Cultural Tourism Studies' (Routledge, 2009) pp. 18-19 lists thirteen categories of cultural tourism which she reduces to nine and later seven broad sub-sectors. See Appendix X of the Regional Report for a detailed 'Typology of Cultural Tourism'.

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arts 'lobbying industry' has for many years ubiquitously used the terms cultural industries and creative industries interchangeably in order to protect or bolster publicly-funded culture budgets. Although things have moved on and in many countries the importance of the arts, for example, is recognised and understood as a part of the creative industries value chain, there is still often a lot of blurring and definitional confusion⁶.

Perhaps naively, we had the intention at the outset of our work of trying to bring some clear and overarching, definitional discipline to our subject. This brave intention was eliminated as a result of almost the first day of the first country visit where it was clear that there were very local and legitimate interests, debates and specificities and that it would be artificial to impose on countries definitions and categories that might work for some but not for others. Imposing definitions would in some cases have been positively distorting to an understanding of the local CCI situation. It should also be mentioned, as will be seen from the two footnote references above to a very recent European Parliament report, that even at EU level, where the cultural and creative industries have soared to a position of highest importance in terms of policy, terminology is often loose, for example with both the terms Cultural and Creative Sectors (CCS) and Cultural and Creative Industries (CCI) being used.

In the context of our work we therefore felt there was no alternative but to assess the cultural and creative industries and the tourism sector in the individual countries in their own terms and then with the regional/cross-country report to try to bring them together.

Although it is right to look at ways of increasing the synergies between the tourism industry and CCIs it is important to recognise that there is already a substantial level of engagement. For example even a superficial listing of the main CCIs illustrates how they are already contributing to the tourism sector:

- Software and digitalisation - this has had a revolutionary impact on many aspects of the tourism industry, not least in the role that OTAs⁷ play (e.g. TripAdvisor, booking.com, Expedia, Airbnb etc.)
- Design, especially graphic design but also right the way through all aspects of design including 'son et lumière' spectacles, light festivals and events etc.
- Music for place branding, ambience, open-air concerts etc.
- Advertising and broadcasting - the importance of these areas to the tourism industry are self-evident
- Film and cinema - promos, travelogues, film location tourism
- Theatre - use of actors as animators or for audio guides, staged events etc
- Festivals - a major element in event tourism and place branding
- Crafts and antiques - as part of shopping and souvenirs
- Architecture - tourism industry's use of heritage and use/commissioning of significant buildings (including as hotels)

⁶ Committee on Industry, Research and Energy and Committee on Culture and Education of the European Parliament Draft Report (23 June 2016) 'On a coherent EU policy for cultural and creative industries' (2016/2072(INI): [The European Parliament] 'Calls on the Commission to design its future policies based on the following definition of CCIs: 'cultural and creative industries are those industries that are based on cultural values, individual creativity, skills and talent with the potential to create wealth and jobs through generating value from intellectual property. They include the following sectors relying on cultural and creative inputs: architecture, archives and libraries, artistic crafts, audio-visual (including film, television, video games and multimedia), cultural heritage, design, creativity-driven high-end industries and fashion, festivals, music, performing arts, books and publishing, radio and visual arts'.

⁷ Online travel agencies

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- Publishing - travel and guide books are still very popular
- Fashion - place image and branding, folk costumes etc
- Gaming, augmented reality and VR - perhaps still at an early stage but already being used even by big, traditional tourism operators such as Thomas Cook
- Food and local natural products - food festivals, branding ('appellation') and gastrotourism in both urban and rural contexts

So the question is really could, and should there, be more interaction? Is there either 'market failure' or under-utilised potential/resources? Out of which flow other questions, for example, is existing CCI-Tourism interaction because of effective (vertical) policies or in spite of them?

Does a (horizontal) common language exist with regular dialogue and the development of shared interests between the CCI and Tourism sectors? Are there particular tourism sub-sectors and CCI sub-sectors more suited for innovative interaction and more able to produce new cooperation models and paradigms? If there is 'market failure' or under-utilised potential/resources, what kind of intervention or incentivisation is required to make the CCI sector and tourism industry interact more effectively?

As illustrated above, a lot is going on between the various CCI sub-sectors and the tourism industry so there is not classic 'market failure' but rather of 'under-utilisation' which warrants intervention. Tourism and the CCIs share many characteristics. They are fragmented, dynamic, numerically dominated by SMEs and micro-businesses, preoccupied with themselves and often chaotic. They each have their own agendas. There is lack of a common language between them, probably attributable in part simply to lack of time. In general there does also seem to be a lack of 'savoir faire' in terms of their engaging with each other, innovatively or otherwise. For CCI developing clustering appears to be very helpful but CCIs and tourism actors have so far not naturally clustered. Most importantly there have been few practical measures (although there are some good exceptions) to bring tourism professionals and CCI actors together which requires active policy-maker interest, 'interpreters', some funding and participative commitment.

A very important question is to what extent any synergies currently taking place between the cultural and creative sectors and the travel and tourism industry are because of or in spite of current 'vertical' policies. While mention of CCIs contributing to other sectors is frequent, including sometimes in policy documents, it tends not to be targeted in any practical way. There is probably more than one reason for this but the fact that the concept of the CCIs is still relatively new (even if one traces it back to the 1990s) is possibly part of the explanation. One suspects that although the role of the CCIs in terms of their economic and social benefits is increasingly being recognised by European governments there is probably still fairly widespread an issue of real understanding of the CCI phenomenon and the nature of their potential. This is then greatly exacerbated by the problem of poorly 'joined-up' government/administration which particularly affects areas which need to be politically and economically managed in a cross-cutting way. A further issue in some countries is that governments often are not imaginative at working with and for the private sector especially in relation to SMEs, micro businesses and sole traders. There is also an issue of ownership. Which ministry or administration is responsible for CCI development: Culture? Economy? Industry? Innovation? Business?...Shared? Or are the CCIs themselves responsible for their own development?

In the case of the other side of the equation - tourism - who is responsible for developing tourism services, products and events especially in relation to an area like cultural tourism? In most cases, it is not government but SMEs, independent commercial and non-commercial entrepreneurs and cultural institutions acting entrepreneurially or imaginatively, not in fact the Ministries of Tourism. Traditionally policy-makers focus on what they directly control and manage unless lobbied to do otherwise. Leadership and representation in the CCI sub-sectors in many countries is not very well-developed so lobbying is weak. The CCIs have not been noticeably lobbying for more engagement with the tourism industry and the

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tourism industry although much better organised in terms of sector and sub-sector representation has not been noticeably developing an agenda for greater joint dialogue and exploration with the CCI sector.

Again one needs to ask a question, this time why such an agenda has not been developed in the past? It would seem that it may simply be to do with the complexity and chaotic nature of the two sectors. For example, how many sub-sectors does the tourism industry have? If one takes just one of those numerous sub-sectors, for example, cultural tourism, how many sub-sub-sectors does it in turn have? As for the CCIs - how many are they? It depends on the country but in most cases about a dozen? But again if one looks at one of them such as design, one can see that in one ND country it has about 25 defined sub-sectors.

In looking at how the creative industries could foster innovation in tourism in the Northern Dimension area one needs to take into account all the factors mentioned above. It has seemed very clear from our work that to get the two chaotic and fragmented sectors to begin to work better together and feed off each other it will be impossible to identify a single unified interface or find a 'magic bullet'. If progress is to be achieved there is a need to be selective, realistically focussed and take a segmental approach if trying to develop effective models and paradigms for CCI-Tourism cooperation and interaction.

Our work suggests that in being selective and in relation to the Northern Dimension region the most productive tourism target areas are probably going to be heritage tourism, creative tourism (including routes and trails, gastronomy and rural tourism) and events tourism. Heritage tourism is in many of the countries well developed. There are plenty of sites, many museum, but how many apps? Creative tourism which we define more clearly below is a natural ground for all types of CCI involvement. Cultural routes and trails open up innovative opportunities as visitors are there for the experience and need to move, learn, eat, sleep and interact. Cultural routes can of course also be cross-border and multi-country projects. Rural tourism's special challenges - information, communication and access - are also fields of opportunity for CCIs. Events tourism, a priority in many of the ND countries, is still not a saturated area and new festivals of all types are mushrooming in the region and are natural meeting grounds for the CCIs and tourism development. In the case of festivals, the CCIs could be encouraged to provide the linkage and continuity to festivals and events that are often one-off, narrowly-focussed, sometimes self-absorbed and usually of short duration. Why not classical music festivals (with their dying audiences!) linked to co-located youth-oriented fashion pop-ups? CCIs as linkage or continuity is already happening in some places.

Accepting that the creative industries already contribute a lot to the travel and tourism industry but that there could be a more developed relationship especially if targeted at a few very specific tourism sub-sectors, what kind of intervention is needed? At a policy level the first steps would seem to be increased awareness, understanding and interest, in fact the classic 'Hawthorne Effect'. Policy encouragement of 'bottom-up' initiatives and 'horizontal' engagement combined with 'top-led' imaginative and sensitive strategic place branding and effective destination management marketing are also needed. Awareness of the potential of the CCI-tourism relationship needs to be actively promoted in particular by encouraging it to be put on tourism industry agendas and feature as a discussion topic at industry fairs, conferences, events and through industry information channels. Awareness-raising is also needed in the opposite direction by making CCIs more aware of the importance and potential of the tourism sector as a partner and market for creative industries' goods and services. This needs to be done through making it a practical agenda item at CCI events and gatherings and through 'word of mouth'. There is also a need simply to bring tourism and CCI professionals together to create some new and practical bridges. As mentioned earlier, there is little evidence of a common language and probably a need for an intermediary cadre of industry 'producer-interpreters' from both sectors.⁸

⁸ A particularly interesting project, Luova Matka, is currently taking place in Finland which is addressing this issue.

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While in many of the Northern Dimension countries past problems are beginning to be addressed related to finance and investment for CCIs given their non-traditional industry attributes, this is usually manifesting itself in facilitating their access to existing innovation or SME funding schemes which are very general in nature. If real progress is going to be made in drawing the CCI and tourism sectors closer together then there is probably going to be a need for there to be specific and narrowly targeted encouragement and support opportunities and schemes. In practice this probably means that there is a need for specialised agencies (e.g. Innovation Norway, Swedish Agency for Economic and Regional Growth, Enterprise Estonia, Finland's Tekes etc) to focus on this. The CCIs and the tourism sector are often travelling in the same direction but on parallel rails and not on the same track with shared (but perhaps different) 'win-win' goals, something which the specialised agencies could address. The fact is, as already mentioned, the CCI and tourism sectors are dynamic, chaotic sectors and so fragmented that even within each individual sector there are awareness problems, knowledge deficits and communication gaps.

As suggested above a focus should be on heritage tourism, creative tourism (including routes and trails, gastronomy and rural tourism) and events tourism as these areas seem to be the most fruitful for synergistic and innovative engagement with the CCI sector. Heritage and events tourism are self-evidently understandable but the important and still emerging area of 'creative tourism' which we believe perhaps has the most relevance and potential for many of the CCIs, needs some explanation.

It is important to elaborate a little on what creative tourism is, or rather what it is becoming. The concept of creative tourism emerged about fifteen years ago but in the narrow context of people travelling to destinations to follow a course or learn something in a structured setting e.g. to do a cookery course or to learn a language. In recent times, influenced by the dynamism of the CCI sector, creative tourism development has taken on a much wider meaning and includes any tourism experience which involves not only formal but also non-formal or informal learning. Creative tourism is a 'work-in-progress' in that it is seen by some as also having an important co-creation dimension to it i.e. where the tourism provider and the tourism consumer co-create the tourism experience. It is also often seen as embracing all experiences and learning related to a specific place, even those that have not been traditionally perceived as 'tourism' experiences. The local dimension and active participation by 'locals' is also often considered another essential ingredient. Unlike traditional cultural/heritage tourism, creative tourism embraces not only historical culture but also very much contemporary culture. Finally creative tourism can be seen as a reaction to traditional cultural tourism that has sometimes turned into 'serial reproduction'⁹ or 'Gettyisation'¹⁰. There is a demand for distinctively individualised and active experience, not passive consumption of, for example, a franchised Getty museum. Recognition of the importance of this new form of tourism came in 2014 with OECD commissioning the first serious non-academic study of it.¹¹

This already important discernible movement to a new form of individualised, co-created tourism opens up real and innovative opportunities for the cultural and creative sectors to explore and establish new and active relationships with the tourism sector. As is made clear in the regional/cross-country report it will require practical intervention and certain types of support as for all their similarities in terms of being quintessential post-industrial economic sectors, the CCIs and the tourism industry do not speak the same language. Focussing on how bridges can be built between CCIs on the one hand and creative tourism and traditional cultural tourism on the other is probably the best way to start to get the wider tourism industry and the cultural and creative sectors travelling more often and more productively on the same track and with mutually-beneficial and genuinely shared agendas rather than on separate, parallel paths as seems so often the case.

⁹ Greg Richards and Julie Wilson: Developing Creativity in tourist experiences: A solution to the reproduction of culture? in *Tourism Management* 27 (2006), pp 1209-1223.

¹⁰ A phenomenon sometimes referred to as 'Macdonaldisation'

¹¹ OECD (2014), *Tourism and the Creative Economy*, OECD Publishing, Paris.

DOI: <http://dx.doi.org/10.1787/9789264207875-en>

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In the country reports we try to take stock of the current state of the CCIs, of the tourism sector, the general climate of interaction between them, and the general degree of the country's interaction with other Northern Dimension countries plus some country case studies. In the regional/cross-country report we bring things together, present an analysis, draw some conclusions and make recommendations which we hope may help to take things forward.

Key points for Poland include:

- An official definition of culture in the Republic of Poland is constantly in debate. Unofficially, culture is being defined as both "an area of social life which helps to create values" and as "a field in which artistic creation has a major role".
- The Polish cultural policy model is characterized by a high level of decentralization, which emphasizes the important position and role of local governments.
- In Poland, cultural industries are an important component of the cultural sector what effects in a richer and more diverse cultural offer, to which an access is facilitated by the developed network of the cultural institutions, modern technologies and media.
- Poland offers an interesting panel of innovative projects and/or case-studies linking tourism to cultural institutions, cities, arts and heritage sites.

2. BASIC COUNTRY INFORMATION¹²

One can identify two basic periods that characterize the development of Polish cultural policy in the last 60 years. Distinguishing features of the first period – real socialism – include limited sovereignty, a one-party system and a planned economy. The second period – liberal democracy and market economy – recovered Polish independence, introduced parliamentary democracy and principles for a market economy.

1989 is the watershed year that marked the shift between these two periods and the year when the first democratic parliamentary election was held in post-communist Poland.

Before 1989, cultural activities were organized under a system characterized by a high level of centralization, institutionalization and a monopoly of state property. Decisions made on the development of cultural activities were strongly politicized and the creative arts were under political censorship. The principles of cultural policy were created by both the Ministry of Culture and Arts and the Cultural Division of the Central Committee of the PZPR (Polish Communist Party). At the same time the growth rate of public cultural expenditure was higher than the growth rate of the GDP, which gave the state legitimacy to act in this field.

The "Fund of Development for Culture" was established in 1982 as a means to secure this position. Between 1982 and 1989, expenditure on culture within the overall state budget rose from 1.25% to 1.81%. This relatively high level of public funding for culture enabled wider access to cultural goods and services and a feeling that professional stabilization for artists working conditions was being achieved.

After 1989, Poland underwent a process of political and economic transformation and the state re-established its new responsibilities with a social character. Those responsibilities were formulated in the introduction to the Constitution of the Republic of Poland. Article 73 directly refers to the field of culture and states that everyone is granted the right of freedom of creation, to conduct scientific research and announce their results, freedom of education and use of cultural assets.

The new principles for organizing and financing cultural activities were formulated in 1993 and presented in the governmental document entitled The Principles of State Cultural Policy. According to this document, the Polish government should:

- encourage the growth of democracy and the strengthening of civil society;
- make it easier for artists and institutions to convert to the market economy;
- protect the most precious cultural assets; and
- introduce and encourage legal solutions which facilitate the development of new forms of cultural activity.

Cultural policy should therefore achieve the following goals:

- decentralization – shift competencies from the central administration to the provincial level, and from the provinces to the lower levels of administration: districts, municipalities and communes;
- provide public financial support for selected cultural institutions and crucial cultural events;
- provide support for the development of non-public cultural institutions and funding mechanisms which could supplement the public funding of culture.

These goals are in support of the principles formulated in 1993.

¹² Acknowledgement to the CoE Compendium <http://www.culturalpolicies.net/web/countries.php>

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Cultural policy priorities established by the Ministry of Culture for the newly established democracy were published in 1995. The three most important areas for state support were identified as books, the protection of national heritage and cultural education.

The years 2001 and 2002 can be considered a turning point when the Minister of Culture's programme of reforms became the subject of consultations. The programme included comprehensive changes in the organizational and financial system for Polish culture. New sources of financing for culture were also proposed including financing culture from state lottery funds, which was eventually introduced. Still, the attempt to reform the general system of financing and organizing the cultural sector turned out to be unsuccessful.

The following Minister of Culture specified new priorities for 2003¹³ as follows:

- strengthening the basic pillars of the national film industry, such as script-writing, production and distribution, by creating new conditions for funding;
- promoting books and reading especially among children; emphasizing the role of reading in the cultural formation of society; supporting cultural periodicals and literature (with a limited number of copies);
- highlighting the mission of the public media and its contribution to national culture;
- supporting activities aimed at broadening access to cultural goods for the disabled; and
- supporting young artists.

In 2003, efforts were made to prepare Poland for gaining access to EU funds, especially Structural Funds. In this context, emphasis has been placed on developing regional approaches to the development of culture. In 2004, encouraging access to European Union funds was a priority for the Ministry of Culture. The document entitled *The National Strategy for the Development of Culture (NSRK)* for 2004-2007 was then developed.

The arrival of the *National Development Programme for 2007-2013* forced the Minister of Culture to extend the period of the *National Culture Development Strategy 2004-2013*. As a result, a document extending the strategy was prepared, entitled the *National Development Strategy Supplement for 2004-2020*.

The strategic functional areas, set by the *National Strategy for the Development of Culture* as elements of the State's Cultural Policy, have been the basis for 5 National Culture Programmes.

The Programmes were designed as functional action plans and guidelines for implementation as well as tools for exact schedules of activity. Their aim was to enable monitoring and evaluation of the implementation process. In the following years, the ministers used the proposed formula and introduced new issues in place of National Cultural Programmes, commonly known as Minister's Programmes.

Definitions

An official definition of culture in the Republic of Poland is constantly in debate. Unofficially, culture is being defined as both "an area of social life which helps to create values" and as "a field in which artistic creation has a major role". These two aspects are presented in several government documents such as "Cultural Policy of the State in a New Historical Situation", a speech of the Minister of Culture at the conference entitled "The Situation of Polish Culture at the Time of Transformation 1989 – 1997".

In reality, the problem is not the definition of culture, but the scope of state responsibilities for culture and the interests of the Ministry of Culture. The emphasis being placed on national heritage, for example, is on the one hand easy to understand in the light of globalization and European integration processes. On the

¹³ Information gathered in situ and on Polish Ministry of Culture and National Heritage
<http://www.mkidn.gov.pl>

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other hand it generates fears of a traditional understanding of culture and raises questions about support for contemporary cultural issues and activities.

A new attitude towards culture can also be noticed. One example is the effort being made to stress the economic value of culture. The latter is, however, creating a separation between subsidized culture, which is a central objective of state cultural policy, and its industries. More and more objections are being voiced regarding this separation. This new way of defining culture is reflected in the 2004 government document, *The Strategy for Development of Culture 2004-2007*. In this document, culture is defined as one of the elementary factors of development, the basis of intellectual capital, while it also encourages equal opportunities in access to culture and promotes economic growth through rising investment attractiveness of particular territorial units and Poland as a whole culture is also the basic determinant in defining the metropolitan functions of cities in a spatial, economic and social context.

3. CULTURAL AND CREATIVE SECTORS/CCIS IN POLAND

The Polish cultural policy model

When developing the new model for Polish cultural policy, various systems were considered. First, the old social democratic / social democracy approach was examined, but was quickly rejected as a basic model because it was demanding and related too much to the Communist era. During the first three years of transformation, there was strong support for a more neo-liberal approach, but it was then dismissed as an option for the future.

Today the "third way" has become a popular approach. It is based on the welfare state

model and advocates partnership between the state and an active civil society. Despite the potential role of third sector organizations – foundations or associations – they are still not regarded as real partners of local government administration or the state in the field of culture (e.g. as cultural managers or as agencies to distribute public funds).

In summary, the major changes which have taken place in the cultural sector since 1989 revolve around 6 main axes:

1. *decentralization* of the powers of the public administration concerning culture;
2. *transferring the majority of cultural institutions* from the central government to local governments;
3. *privatization* of the majority of government owned culture industries (publishing, cinema, galleries etc.);
4. *abolishing censorship* (waiving the requirement for formal authorisation to undertake artistic / cultural work);
5. *ceasing detailed co-ordination and control* of all levels of public spending on culture (especially from the Ministry and Voivode); and
6. *general changes* in the administration and regulations of the government which have had a major impact on culture.

Today, the Polish cultural policy model is characterized by a high level of decentralization, which emphasizes the important position and role of local governments. The process of decentralization for the management and financing of culture is connected to the introduction of various legal acts which initiated an overall reform of the national political system and transferred many competencies in the field of culture to local governments and their administration. For example, the 1990 *Act on Local Government Administration* states that responsibility for libraries and other institutions aimed at the local dissemination of culture is to be devolved to local governments.

As a result of the second phase in the overall administrative reform, two new tiers of local level management were established: provincial (Voivodeships) and district (Poviats). These two new levels became legally obliged to provide public activity within the area of "culture and protection of its goods". Responsibility for local culture activity and the establishment of local cultural institutions, once the sole domain of municipalities / communes, is now shared between the provincial, district and municipal / communal administrations.

Below is an illustration of cultural sectors and sub-sectors division: ¹⁴

¹⁴ International Journal of Entrepreneurial Knowledge Issue 1/2014, Volume 2

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Table 1. The division of the culture into principal areas, sectors and subsectors

Areas	Sectors	Subsectors	Characteristics
Main fields of art	Staged art	theatre, dance, music, opera	Nonindustrial activities. Products are prototypes and have a "potential of securing with the copyright", i.e. are based on a creation which could be a subject of the copyright, but is not systematically protected (how it takes place in case of the handicraft or some productions from the field of staged or visual arts)
	Visual art	painting, sculpture, craft	
	Media art	artistic installations, film, digital art computer	
	Literature	lyric poetry, narrative, drama	
Industries of the culture	The film and the video		Activities of industrial character, set to the mass reproduction. Products are subjected to copyright.
	Television and radio		
	Video games		
	Music	record market, live concerts, the income from the title of the copyright	
	Books and the press	the publishing market and press	
Creative industries	Design	fashion, graphics, interiors design, functional design	Activities not necessarily of industrial character and can be prototypes. Products are subjected to copyright, but can also be a subject of other intellectual property laws (e.g. trademark), creativity(creative abilities and people deriving from the artistic environment and industries of the culture) is essential to functioning of beyond cultural sectors
	Architecture		
	Advertisement		
Related Industries	Manufacturers of computers, Manufacturers of MP3 players, industry of mobile communications and others.		It involves a lot of various economic various sectors, which are dependent on previous "areas"

Cultural and creative industries

The cultural sector in Poland is very abounding and diversified. It is characterized by not only a substantial amount of cultural entities, but also by a multitude of forms of their organization. It is possible to divide this area into three subsectors: public (national and self-government), private and non-profit. Numerous institutional and non-institutional forms of conducting cultural activities appear. This sector gains significance in Poland every year, what is attested by an increase in household expenditure to products of the sphere of the culture.

In Poland, cultural industries are an important component of the cultural sector what effects in a richer and more diverse cultural offer, to which an access is facilitated by the developed network of the cultural institutions, modern technologies and media. The Institute for Structural Research¹⁵ in Warsaw separated cultural industries from creative Industries as illustrated in the following Table:

¹⁵ <http://ibs.org.pl/en/>

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	Industries of the culture	Creative industries
Publishing	+	+
Reproductions of written media	+	+
Production of toys		+
Other retail trade - trade in antiques	+	+
Sale of newspapers, books, music and video recordings	+	+
Services of cable televisions	+	+
Issuing of the software		+
Specialist design \ Other designer services		+
Professional photographic services		+
Architectural services		+
Advertisement		+
Activity associated with the organisation of trade fairs, exhibitions and congresses		+
Creating, distribution, showing films, recordings of films and of TV programmes	+	+
Audio and musical recordings	+	+
Broadcasting programmes	+	+
Literary artistic work, artistic work, activities of the institutions of the art	+	+
Information agencies		+
Libraries, museums and historic buildings	+	+

(Source: Economic meaning of the cultural sector. Introduction to the problem analysis. Final report, Institute for Structural Research, Warsaw 2010)

Creative industries and socio-economic development of the regions

The estimates concerning the participation of the sector of creative industries in the economy are conducted by a lot of organizations. According to calculations of the European Commission the sector of cultural industries and creative industries in countries as, among others, Poland, the Czech Republic, Hungary or Slovakia produces on average c 2% GDP altogether.

In the entire European Union, creative sectors employ over the 3% of all employees (KEA European Affairs, 2010). Growing significance of creative industries in domestic economies including regional economies, translates both for developing enterprising and creative behaviours of residents of the region,

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and to the improvement in its competitive position. It also increases attractiveness of the region for current, as well as future residents, tourists and investors. It is possible to notice the positive connection between the development of creative industries and the social-economic development of the region.

These industries are an analogous development driving force, to agriculture, which was responsible for the growth in the twentieth years of the 20th century, industry in fiftieth and sixtieth years, and in the last two decades – the sector of telecommunications and computer sciences. And so, creative sectors are a generator of new solutions, which transfer to other branches of economy and are adapted or modified there (Smoleń, 2003).

Since 1998, inter-ministerial co-operation in the field of culture has been extensively organized around the programmes devoted to the preparation of Poland for EU membership. The European Committee of the Council of Ministers was formed in March 2004 to operate as a decision-making forum and is responsible for drafting EU integration policy.

There are also a few examples of other types of cooperation:

- In December 2004 the Minister of Culture and the chairman of the Central Statistical Office established a research group. The aim of the group is to carry out research of primary and secondary sources of quantitative and qualitative data for the cultural sector and to establish a methodological basis for the qualitative data of the cultural system. The National Centre for Culture is responsible for providing assistance to the group;
- Another programme of interest is the campaign entitled *All of Poland Reads to Kids*. This programme was established by the *ABCXXI – All of Poland Reads to Kids Foundation*. It was launched on 1st June 2001; there is no intention to end the project. It is a nationwide project aimed at encouraging reading among children and increasing the role of literature in the process of children's mental development. The campaign has received strong support from the Ministry of Culture and National Heritage as well as significant media patronage and sponsorship (many well-known NGOs and public institutions are involved). The project has received a great deal of visibility thanks to strong and modern advertising opportunities in many nationwide television broadcasts and coverage in the main newspapers and periodicals; and
- In February 2009, the Minister of Culture and National Heritage, Bogdan Zdrojewski, and the Minister of Education, Katarzyna Hall, signed an *Agreement on Cultural Education in Public Schools*. According to this agreement, the programme of cultural education in schools will be enlarged and modified to make it more relevant for pupils.
- In 2010, the Ministry of Culture and National Heritage started cooperating with the Ministry of Foreign Affairs on development of the web portal <http://www.kula.gov.pl> - *Culture in the network for children*. Both ministries share responsibility also for promotion of Poland abroad.

4. TOURISM SECTOR IN POLAND¹⁶

Poland's tourism industry enjoyed growth in 2012, in part on the effects of the UEFA European Championship EURO 2012, and continues to enjoy a rising visitor count in 2013 and beyond, although changes in tourist demographics raise some question marks as whether volume growth will be matched by value growth.

2012 brought a substantial increase in tourist numbers. A spike in foreign visits came in large part thanks to Poland co-hosting with Ukraine the UEFA European Championship EURO 2012, which drew large number of tourists and contributed substantially to the promotion of Poland as a tourist destination. Altogether, 14,8 million tourists visited Poland in 2012, an 11% increase compared to 2011, claims the Polish Tourist Organization. Also, the number of overnight stays increased by 10,3%.

The biggest growth in the number of foreign tourists who used overnight lodging in Poland came from Eastern Europe – Russia, Ukraine and Belarus (together a 40% increase), Polish Tourist Organization also stated. The second group which showed the largest growth where the countries whose football teams participated in the EURO 2012 cup, mainly Ireland, Greece and Portugal. as also visits by Norway, Switzerland and Latvia nationals showed significant growth. Overall, there were 6% more visitors from the EU than in 2011. The same rate of growth applies to visitors from Germany and the UK. The only nationalities which came in fewer numbers in 2012 were Honk-Kongers, Belgians, Finns and Spaniards.

Although the EURO 2012 was an exceptional event and the analysts expected this number to drop in 2013, the current forecasts assume a further increase in the number of tourists visiting Poland.

The number of tourists visiting Poland in 2015 was up to 14,9 mln, claims the Tourism Institute at the Main School of Tourism and Recreation in Warsaw, a primary source of tourism industry analyses. The growth rate of Polish tourism industry value is predicted to stabilize at 2,5-3% within the next 5 years, the Institute of Tourism claims. The revenue in 2014 was expected to reach USD 14 bln, and USD 14.5 bln in 2015.

Today's market trends show a large increase in the cultural tourism, mainly music festivals, concerts and open air events. The largest number of this type of a tourist comes from Germany.

¹⁶ Assessment of National Tourism Development in Poland http://www.ceeweb.org/wp-content/uploads/2013/02/Final_NTDS-Assessment_Poland.pdf

5. CCI AND TOURISM SECTOR COOPERATION IN POLAND

There is no specific programme *per se* linking CCIs to tourism so far in Poland. The country bases its touristic campaigns and policies on attractions linked to its rich cultural heritage which it defines as “historic, religious, industrial and architectural monuments and relics”¹⁷. Most of these sites, well preserved within the major urban centres of Krakow, Gdansk, Poznan, Wroclaw or Sandomierz constitute – along with Museums – major attractions to the various regions.

On its poland.travel website Poland describes its cultural tourism as follows:

Pilgrimage tourism:

There are more than 200 various sanctuaries in Poland. Although mainly Marian, some are dedicated to Jesus Christ or other saints. Each has a miraculous painting, some are also close to a spring which is said to have healing properties like the ones in *Stuzieniczna*, *Krasnobrod* and *Lesniow*.

The oldest Polish sanctuary can be found in *Gorka Klasztorna* where, in 1079, our lady is said to have appeared before a shepherd. The most immense is the basilica in *Lichen* which can accommodate up to 30,000 people. The unique Holy Stairs are in the sanctuary in *Sosnica* and the smallest crowned statuette of the Virgin Mary stands in *Gidle*. It is only 9cm tall but is thought to be very powerful!

Religious tourism

Roman-Catholic sanctuaries are Poland's landmarks. The majority of pilgrims flock to the Pauline Monastery on Jasna Góra in Częstochowa. Here you will find the blessed icon of the Black Madonna, venerated both in Poland and abroad. The followers of other faiths have their sanctuaries in many places around the country: the Eastern Orthodox Church at Grabarka, the Protestants at Karpacz, Wisła and Cieszyn, and the Muslims at Bohoniki.

Fortresses/Battlefields tourism

Traces of military activities, which were once hidden from the sight of outsiders, are today made available for the public to visit or converted into museums, housing estates or.....even night clubs like the Raclawickie Forts in Warsaw, the remnants of the tsarist system of fortifications which also included the capitals citadel.

Archeological sites tourism

Before the first Palaeolithic hunters appeared on the lands that are now Poland around 100,000 years ago, our country was a marshy green plain on which dinosaurs grazed. The most famous of these, *Silesaurus Opolensis*, meaning "Silesian lizard from Opole", one of the oldest known reptile species in the world, lived more than 230 million years ago in *Krasiejow*. The most significant archaeological finds end up in museums. A gold crown with little eagles, part of the so called *Sredzki Treasure*, which was stored in the archives of the National Museum in Wroclaw, can be seen exhibited in *Sroda Slaska*.

Castles and Palaces tourism

Over the last several years' Polish castles and palaces have began to regain their former glory. The former residences of the powerful families are being converted in original period hotels. The chivalry culture flourishes in Polish castles as tournaments and balls are organized in the original costumes of the era and some of the sites also try to recreate cultural events of the region. A Chopin Festival is regularly organised at the hunting palace of the Radziwill family in *Antonin* and a gallery that promotes young contemporary

¹⁷ <http://www.poland.travel/en/>

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artists has been opened in the former conservatory of the palace in *Staniszow*, the one time residence of the Reuss Princes.

Jewish culture tourism

Remains of the Warsaw Ghetto are few, namely the restored Nozyk Synagogue, and the Jewish Cemetery. Of particular interest are the exhibits at the Jewish Historical Institute that focus on the history of the material and spiritual culture of Polish Jews from their beginnings to the present day. Warsaw is also home to the only European theatre performing in Yiddish, the State Jewish Theatre. Other sites may be visited in Krakow, Lubin and Lodz.

Industrial heritage tourism

Until recently, these sites were being treated as a blight element on the landscape. Today, the ones that have been restored attract large crowds. Old factories, breweries and mines are becoming popular tourist attractions. More than 2000 post-industrial sites have already been added to a list of available attractions!

Other categories, such as UNESCO classified monuments and sites, architectural gems or Routes with a theme are also used as tourist attractions.

Chopin tourism

Now, since Spring 2015, there are plans for a website dedicated to Chopin tourism, and the tourist board is also working on a mobile application that will allow users to take “selfies with Chopin” at five locations across Warsaw, with a picture of the composer superimposed on to the image.

Tourism officials say a concerted effort is under way to cash in on the composer, as the country seeks to build on the 3 million visitors who come to Warsaw each year.

Of those, 200,000 already visit two museums dedicated to the virtuoso pianist – a baroque palace in central Warsaw’s unlovely, grey, communist-era blocks, and his birthplace in bucolic Żelazowa Wola, an hour west of the city.

However this is a plan linked to the composer’s birthplace and not to music as a creative/ cultural industry as such¹⁸.

¹⁸ Information collected in situ – Reference : <http://festiwal.nifc.pl/en/>

6. POLAND'S BILATERAL AND MULTILATERAL CCS/CCI AND TOURISM COOPERATION WITH OTHER ND COUNTRIES

The overall character of Polish international cultural co-operation is determined by either specific geographical location or economic and political interest. The main groups that benefit from Polish cultural diplomacy tend to be part of influential and opinion-making circles throughout the world, mainly in the Member States of the EU. On the other hand, Polish cultural diplomacy supports co-operation with countries on its Eastern border: Ukraine, Russia and Belarus, the latter via non-governmental bodies. Poland is also engaged in multilateral co-operation with regional organisations e.g. Visegrad Group and Ars Baltica.

Another very visible focus of cultural co-operation is the USA, which is tied up with economic lobbying. Cultural links with Israel are also important due to the historical background of the Jewish Diaspora.

The most distinct change in foreign cultural policy has been fuelled by Poland's accession to the European Union and is aimed at strengthening relations with EU structures and West European countries. Simultaneously, there has been a visible set-back in former East-East relations. Over the past years, the significance of state bilateral co-operation has been decreasing and is being replaced by activities initiated by European organisations and initiatives undertaken by networks, institutions and individual artists who have pursued their own (direct) forms of co-operation.

Poland is a member of Visegrad Group (V4)¹⁹, which reflects the efforts of the countries of the Central European region to work together in a number of fields of common interest relating to European integration. The Czech Republic, Hungary, Poland and Slovakia have historically been part of one civilisation sharing cultural and intellectual values and common roots of religious traditions which they wish to preserve and further strengthen.

All the V4 countries aspired to become members of the European Union, perceiving their integration in the EU as another step forward in the process of overcoming artificial dividing lines in Europe through mutual support. They reached this aim on 1 May 2004 when they all became members of EU.

All of the activities of the Visegrad Group are aimed at strengthening stability in the Central European region. The participating countries perceive their cooperation as a challenge and its success as the best proof of their ability to integrate into structures such as the European Union. In order to support multilateral co-operation the Visegrad Fund was established in 2000. The mission of the Fund is to promote the development of closer cooperation between the Czech Republic, Hungary, Poland and Slovakia and strengthening of ties between these states. The fund supports the development of common cultural, scientific research, and educational projects, exchanges between young people, promotion of tourism and cross-border cooperation. The budget of the Fund is created by equal annual contributions of the four Member States.²⁰

The current activity of the V4 Group in the field of culture is focused on matters connected with participation in EU bodies as well as on current issues like the protection of cultural heritage or the role and functioning of libraries. Presently, the V4 Group is seeking a platform of co-operation with partners from the Ukraine and Belarus.

Poland is also a member of Ars Baltica – created in 1989 as a forum for multilateral cultural co-operation with an emphasis on common projects within the Baltic Sea Region. It gives priority to art, culture and

¹⁹ <http://www.visegradgroup.eu/>

²⁰ <http://visegradfund.org>

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cultural history. The intention of Ars Baltica is to enhance cultural identity in the Baltic Sea Region and also to realise projects of European significance²¹. Its goal is to implement common projects, with the intention that they will become regular networks of individuals and organisations. Co-operation between the members is carried out by meetings, exchanges of information and joint projects. There are 10 member countries including: Denmark, Estonia, Germany, Finland, Latvia, Lithuania, Norway, Poland, Russia and Sweden). A number of Polish cultural operators have been involved in projects such as the: *Towns on the Baltic Coast and their Common Heritage* and *Baltic Culture and Tourism Fortresses' Route*.

Certified Cultural Routes of the Council of Europe crossing Poland:

- The Santiago De Compostela Pilgrim Routes
- The Hansa
- The Viking Routes
- The European Route of Jewish Heritage
- The Cluniac Sites in Europe
- The Via Regia
- The European Route of Cistercian abbeys
- The European Cemeteries Route
- Destination Napoleon

World Heritage Sites: 14 (13 Cultural and 1 Natural)

13 Cultural sites:

- Auschwitz Birkenau. German Nazi Concentration and Extermination Camp (1940-1945) (inscribed in 1979 as “The Auschwitz Concentration Camp” and renamed at the 31st session of the World Heritage Committee in 2007)
- Castle of the Teutonic Order in Malbork (1997)
- Centennial Hall in Wrocław (2006)
- Churches of Peace in Jawor and Świdnica (2001)
- Cracow's Historic Centre (1978)
- Historic Centre of Warsaw (1980)
- Kalwaria Zebrzydowska: the Mannerist Architectural and Park Landscape Complex and Pilgrimage Park (1999)
- Medieval Town of Toruń (1997)
- Old City of Zamość (1992)
- Wieliczka Salt Mine (1978)
- Wooden Churches of Southern Little Poland (2003)
- Muskauer Park / Park Mużakowski (2004), jointly with Germany
- Wooden Tserkvas of the Carpathian Region in Poland and Ukraine (2013)

1 Natural transnational site:

- Belovezhskaya Pushcha / Białowieża Forest (1979), transboundary with Belarus

Tentative List: 5 properties

- Gdansk - Town of Memory and Freedom (2005)
- Białowieża National Park - extension, modification (2006)
- The Augustów Canal (Kanal Augustowski) (2006)

²¹ <http://www.ars-baltica.net/>

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- The Dunajec River Gorge in the Pieniny Mountains (2006)
- Tarnowskie Gory Lead-Silver Mine and its Underground Water Management System (2013).

Intangible Heritage Lists: no elements

Memory of the World Register: 14 inscriptions

- Nicolaus Copernicus' masterpiece "De revolutionibus libri sex" (1999)
- Warsaw Ghetto Archives (Emanuel Ringelblum Archives) (1999)
- The Masterpieces of Fryderyk Chopin (1999)
- The Confederation of Warsaw of 28th of January 1573: Religious tolerance guaranteed (2003)
- Twenty-One Demands, Gdańsk, August 1980. The birth of the SOLIDARITY trades union - a massive social movement (2003)
- Codex Suprasliensis – Mineiačetia, Mart (The Supraśl Codex – Menology, March), jointly with the Russian Federation and Slovenia (2007)
- National Education Commission Archives (2007)
- Archives of the Literary Institute in Paris (1946-2000) (2009)
- Radzwill's Archives and Niasvizh (Nieśwież) Library Collection, jointly with Belarus, Finland, Lithuania, the Russian Federation and Ukraine (2009)
- Archive of Warsaw Reconstruction Office (2011)
- Peace treaties (ahdnames) concluded from the mid-15th century to late-18th century between the Kingdom (or Republic) of Poland and the Ottoman Empire (2013)
- Collections of the 19th century of the Polish Historical and Literary Society / Polish Library in Paris / Adam Mickiewicz Museum (2013)
- Files and library of the Unity of the Brethren (2015)
- The Book of Henryków (2015).

Creative Cities Network:

- Kraków, a UNESCO Creative City of Literature (2013).

Legal instruments: 23 ratified and 17 non-ratified

- Second Protocol to the Hague Convention of 1954 for the Protection of Cultural Property in the Event of Armed Conflict: accession (3 January 2012)
- Convention for the Safeguarding of the Intangible Cultural Heritage: ratified (16 May 2011)
- Convention on the Protection and Promotion of the Diversity of Cultural Expressions: accession (17 August 2007)
- International Convention against Doping in Sport: accession (17 January 2007)

7. COUNTRY CASE STUDIES

Case studies have been selected either as proposals by our interlocutors during country missions, and/or identified *in situ* by the experts or through deskwork and study of existing literature. It has been particularly difficult in certain cases to identify relevant case-studies focused on the theme of this assignment for reasons that are further developed in the cross-country report.

7.1. *Mobility and Sustainable Cultural Tourism (Case Study: Cracow and Warsaw Old Towns Accessibility)*²²

Sustainable tourism means reducing barriers of accessibility in the tourist destinations. It requires the creation and promotion of barrier – free space, facilities and services. The aim of the study was to examine the current accessibility of Cracow and Warsaw historic districts, which are the most popular tourist destinations in Poland. Tourists with motor, visual and hearing impairment require special aids to visit historical cities and tourist attractions (as museums) safely and relatively independently. Our research objective was also to outline a model of principal improvements to enhance accessibility to heritage sites, which could be replicable in the similar contexts of other Polish historic cities (as for example in Torun).

The research was conducted between 2012 and 2015 in Cracow and Warsaw Old Towns both are medieval historic districts enlisted to the UNESCO World Heritage List and create popular tourist destinations. Information on tourist accessibility of the Old Towns was gathered based on experience from the authors' visits, observations and field research, as well as publications, law regulations, local authorities strategies undertaken to improve accessibility of tourist reception areas.

Accordingly to the law regulations, in Poland newly erected buildings and public space must be accessible to persons with hearing, visual and motor impairments. But still, almost 70% of museums and tourist attractions at heritage sites are inaccessible to persons with motor impairment. There are not enough provision of services and facilities dedicated to disabled. For example visual information is too rarely accompanied by records in the Braille alphabet or with sound – visual assistance. The article presents the most important modifications to be applied in aim to enhance the accessibility of Cracow and Warsaw, the two most popular tourist destinations in Poland, and identifies a number of the 'best practice' recommendations to be applied to sustainable planning and management of tourist space of high cultural values with regard to disabled tourists.

Removing barriers for disabled tourists in historical buildings is often difficult not only due to the high costs of such projects, but also due to strict requirements issued by the Polish Heritage Conservatory office (which usually prevent extensive intervention in historical buildings). The open question remains whether entirely 'mobile tourism' is achievable in a historic city, on how high costs and how big compromises are necessary. Moreover, as each historic site is unique -an individual approach, rather than universal model, is necessary to enhance tourism sustainability and reduce barriers.

7.2. *Heritage Interpretation Centre*²³

When modernizing the former boiler house for the needs of the branch of the Historical Museum of Warsaw, the architects made sure that the refurbished interiors visibly displayed elements of the old architecture. Therefore, entering the Heritage Interpretation Centre we can see, among others, a fragment of the fourteenth-century walls of the Old Town. Brzozowa Street, where the centre is located was once

²² Journal of Tourism & Hospitality 2016, 5-1 and through interview

²³ UNESCO NC for Poland, Warsaw

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called Podwalna (On the Embankment), due to its location near the fortifications. You'd be surprised, however, seeing at the entrance an incomplete fragment of an old building and expecting a neglected or archaic interior. Warsaw's Old Town Heritage Interpretation Centre is a unique museum fully utilizing modern technologies. Its main and permanent exhibition "The destruction and reconstruction of the Old Town" is chronologically organized.

After hearing the history of Warsaw and reading a calendar of Old Town, visitors can realize what happened to the Old Town and its inhabitants during World War II.

Boards, large format photographs, plans and drawings, as well as multimedia presentations and themed animations fill the space with a total area of 435 m². They explain to visitors not only the history of the Old Town or the enormity of the destruction during the war, but also the times of reconstruction. It started in 1949, and the ceremonial handover of the almost entirely reconstructed Old Town took place just five years later. It is this effort, enthusiasm of architects and builders that was appreciated by Unesco, which after nearly thirty years entered the entire historic Old Town complex on its World Heritage List. The reconstruction was a unique project throughout Europe. However, the Heritage Interpretation Centre is not only a permanent exhibition. It hosts a variety of meetings, workshops, thematic cycles and, finally, book promotions related to the overall history of Warsaw.

7.3. Museums in cultural tourism in Poland²⁴

University of Łódź - Department of Urban Geography and Tourism.

The study-case concerns the museums, their potential and their significance for cultural tourism in Poland. Its aims are achieved through a presentation of registered national museums, 'monuments of history', museum buildings and the cultural activities undertaken by these institutions.

Museums occupy a special place in Poland's cultural tourism. The strong relation between museums and cultural heritage is confirmed by the national documents which regulate their functioning – Museum Act (1996), Cultural Activity Act (1991) and the Historical Monument Preservation and Protection Act (2003).

Along with art galleries, theatres, cinemas and libraries, museums are institutions under the responsibility of the Ministry of Culture and National Heritage. From all these, for Polish authorities, museums are certainly the most closely related to tourism, especially cultural tourism. By definition, museums which present the culture of an area (a country, region or city) and the heritage of a community (an ethnographic, ethnic or national group), are significant institutions in cultural tourism and worth attention. A specific study was commissioned aiming to demonstrate the importance of Polish Museums in Cultural Tourism and to classify them according to a geographic and thematic breakdown.

According to reports from the National Institute of Museology and Historical Monument Protection, there are 779 museums in Poland (480 main museums and 299 branches), which function on the basis of a statute or set of rules approved by the Minister of Culture and National Heritage. Polish museums are found in all voivodeships, as well as in tourist and historical regions. Considering the way in which they were established, they may be divided into state, district (voivodeship, powiat/county, gmina/ commune) and private (institutions, foundations, private). The long list includes institutions of varied levels and importance on national, regional or local scales.

The list of registered museums currently includes 118 buildings (www.mkidn.gov.pl), which makes up about 15% of all the museums in Poland catalogued by the National Institute of Museology and Historical Monument Protection. They differ as regards collections (art, historical, martyrdom, etc.), scale (city,

²⁴ Beata Krakowiak - DOI 10.2478/tour-2013-0008

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regional, national) and distribution (found in every voivodeship). The museums can be seen as representing the whole country.

7.4. *SWOT analysis in the formulation of culture strategies based on destination* 25

Wrocław School of Banking - Faculty of Economics in Opole - Opole University of Technology - Institute of Tourism and Leisure.

The study identifies the role of SWOT analysis in the formulation of tourism development strategies for destinations. SWOT analysis helps to establish a reliable diagnosis of the internal potential shown by a tourism destination and its environment. In the Polish economic situation, SWOT analysis is frequently used in a fragmentary manner which should be considered as a serious methodological oversight and may jeopardize the value of the entire process related to the strategic management of the tourism destination.

The application of SWOT analysis enables the entities which are responsible for management of local or regional tourism policies in destinations, to position tourism in the overall and general strategic planning in a methodical and orderly way. According to the study, the local government units are obliged, by law, to pursue a tourism policy where planning is an important function. The identification of objectives and methods to be employed in the development of tourism, i.e. functional planning, should always be preceded by SWOT strategic positioning as an integrated tool which can be used to carry out such activities as planning, coordination, monitoring, control and promotion.

7.5. *Activation of the Polish coastal tourism based on PPP*²⁶

Public-Private Partnership (PPP) is a form of cooperation between the public sector and the private in order to carry out projects or services traditionally supplied by the public sector. This mode of investment is most commonly applied to the creation of technological infrastructure projects. According to the study PPP will allow coastal tourist communes (*gminas*) to speed up the implementation of the communication infrastructure, and the sport and recreational infrastructure which are presently major barriers to the development of the tourist economy.

7.6. *Holiday experience industry and product development*²⁷

University of Łódź - Institute of Urban and Tourism Geography.

The turn of the 20th and 21st centuries was marked by the development of experience economy, in which the basic commodities are not specific products, but the customers' emotions, impressions and experiences. Tourism has always been a particular "holiday experience industry". In recent years, however, the importance of the conscious creation of emotional tourism products has become even greater; we may observe continuous efforts to multiply and intensify tourism experience. The key activities to achieve this goal include transforming tourism infrastructure into unique tourism attractions, enlarging traditional services/service packages by elements providing additional emotions and satisfaction, using modern technologies in order to add virtual entities to real tourism space (augmented reality), as well as to conveniently record tourism experience and share it with the public.

²⁵ Bolesław Goranczewski Wrocław School of Banking DOI: 10.2478/v10106-010-0008-7

²⁶ Information collected in situ – data expected

²⁷ University of Łódź Institute of Urban and Tourism Geography: DOI 10.2478/tour-2013-0003

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The most significant change is the transformation of the tourist from a passive observer to an active participant. For the ‘new tourists’, it is essential that they can interactively influence the course of the action, co-decide, co-create their own and their companions’ experience. Using IT terminology, this phenomenon is defined as ‘tourism 2.0’. ‘In such tourism, the borders between suppliers and buyers, as well as between tourists and the inhabitants of tourism destinations are becoming blurred’. In this way, consumers are paradoxically becoming the producers of the tourism product, or even a part of it.

A response to the consumer’s growing expectations is the assurance of an appropriate supply by the tourism sector. The current trend is to multiply and intensify impressions and emotions in order to surprise, amaze, or sometimes shock modern collectors of holiday memories, so that they are fully satisfied.

This study shows that the activities to achieve this goal are varied. The most important of them include:

- transforming tourism infrastructure into unique tourism attractions, presenting controversial architecture, interior design, a particular atmosphere or the unusual character of the services provided;
- enlarging the traditional service package by elements providing additional emotions, impressions and satisfaction;
- using modern technologies to enlarge real tourism space by virtual entities (to create augmented reality), evoke a feeling of satisfaction in tourists’ minds, as well as to conveniently record tourism experience and share it with the public.

7.7. *Marine Wreck Tourism*

More and more intense development of skin diving has been observed in Poland since the mid nineties. Considering the natural conditions - cold water, poor visibility, and flora and fauna hardly different in comparison with other seas - wreck diving is one of the greater attractions of the Polish seawaters. Thanks to the low salinity level of the Baltic Sea, wrecks are preserved in a much better condition than in other regions. Uncontrolled access to the wrecks may lead to irreversible damage in a very short time and, finally, result in the material reduction of their value as a tourist attraction and, in some cases, historical objects. The Polish Maritime Museum is an institution committed, in particular, to the research and protection of the underwater cultural heritage of the Baltic Sea. Observing the rapid increase in the interest in shipwrecks, the museum decided to join the process of creation of professional wreck tourism from the scratch. In this case, “professional” means not only safe and attractive but also guaranteeing good maintenance of resources of the underwater museum of the Baltic Sea.

Marine wreck tourism in its present form does not meet the above-mentioned requirements. It also fails to use the full potential of wrecks accessible not only to skin divers but also other lovers of popular water sports. The activities that have commenced as part of the “Marine Wreck Tourism” project create bases for professional wreck tourism. Addressees are skin divers interested in wreck tourism and also individuals who practice popular water sports, walking, cycling and hang-gliding. Widespread and systematic availability and the popularization of marine topics strengthen considerably the position of the Pomorze region thanks to its unique tourist offerings. In the situation of a drastic reduction in the fishery fleet, the creation of a new tourist attraction characteristic for seaside communes would make it possible for some fishermen to stay “at sea” after being re-qualified to carry out such an activity. It is they who lived on the sea for generations who know best where wrecks are located on the sea bottom and, seeing the benefits resulting from their good condition, could considerably contribute to the true protection of underwater cultural heritage.

8. COUNTRY CONCLUSIONS AND OBSERVATIONS

8.1. General conclusion

The views and data collected during this exercise highlight how the understanding of CCI in the 11 NDPC countries is a continuous negotiation between three key dimensions:

- the definition of CCI itself
- the way CCI are seen in the economy in relation to public, private and not for profit sectors;
- the complex intersection of European, national but also regional and urban policy frameworks

Both the ToR of our assignment and the approved Inception Report underlined a challenge which is also an essential finding of the study “11 Dimensions - Trends and Challenges in Cultural and Creative Industry Policy Development within the Northern Dimension Area”, commissioned by the NDPC and published in May 2015 which states that:

"The ND countries comprise a very heterogeneous region in terms of CCI. This heterogeneity stems largely from the fact that the countries are at different stages of development considering the CCI. Depending on the stage of development, there are considerable differences in how the CCI are viewed ranging from traditional arts and culture to focus on creative economy. Similarly, there are differences in which sub-sectors are included under the CCI. Furthermore, the CCI are only beginning to have a national policy status throughout the region, and the focus and real actions taken to develop the sector are varied".

This finding has been greatly confirmed by the field missions and the deskwork done during the study phase. The inter-related dynamic environment of policy making for the specific field concerned by our mission underlines the necessity for constant transnational exchange of information and knowledge in the field of cultural research. This aspect will be more concretely illustrated by the cross-country report and respective recommendations.

8.2. Country conclusions - Poland

1. An official definition of culture in the Republic of Poland is constantly in debate. Unofficially, culture is being defined as both "an area of social life which helps to create values" and as "a field in which artistic creation has a major role".
2. In reality, the problem is not the definition of culture, but the scope of state responsibilities for culture and the interests of the Ministry of Culture. The emphasis being placed on national heritage, for example, is on the one hand easy to understand in the light of globalization and European integration processes. On the other hand it generates fears of a traditional understanding of culture and raises questions about support for contemporary cultural issues and activities.

The Polish cultural policy model is characterized by a high level of decentralization, which emphasizes the important position and role of local governments. The country has adopted a model of cultural management which aims at encouraging the growth of democracy and the strengthening of civil society at facilitating the conversion of artists and institutions to the market economy, at protecting the most precious cultural assets; and at introducing a legal framework which facilitates the development of new forms of cultural activity.

3. Specific efforts were deployed since 2003 to prepare Poland for gaining access to EU funds, especially Structural Funds. In this context, emphasis has been placed on developing regional approaches to the development of culture.

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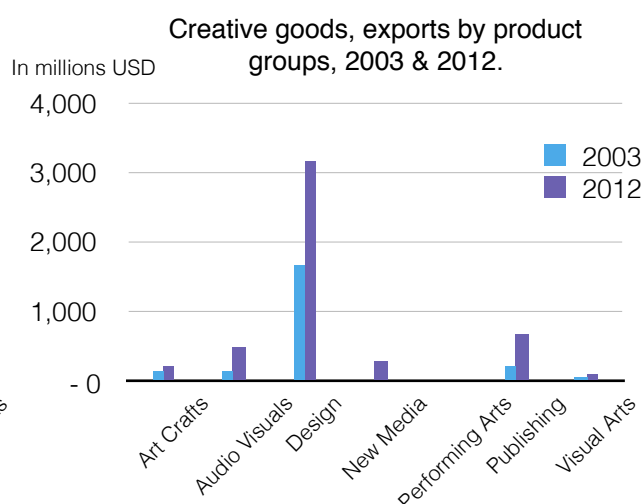
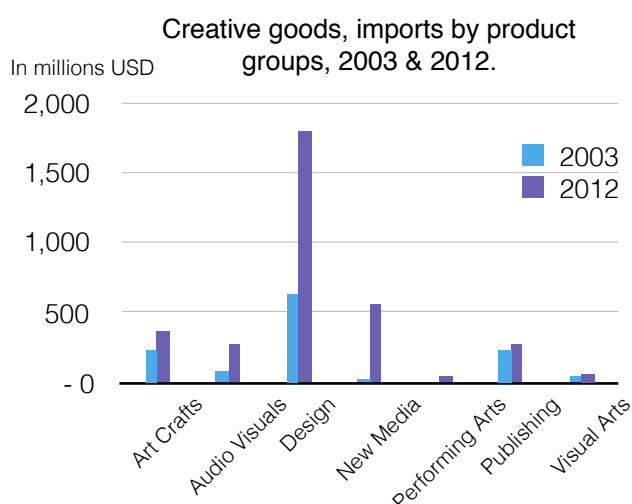
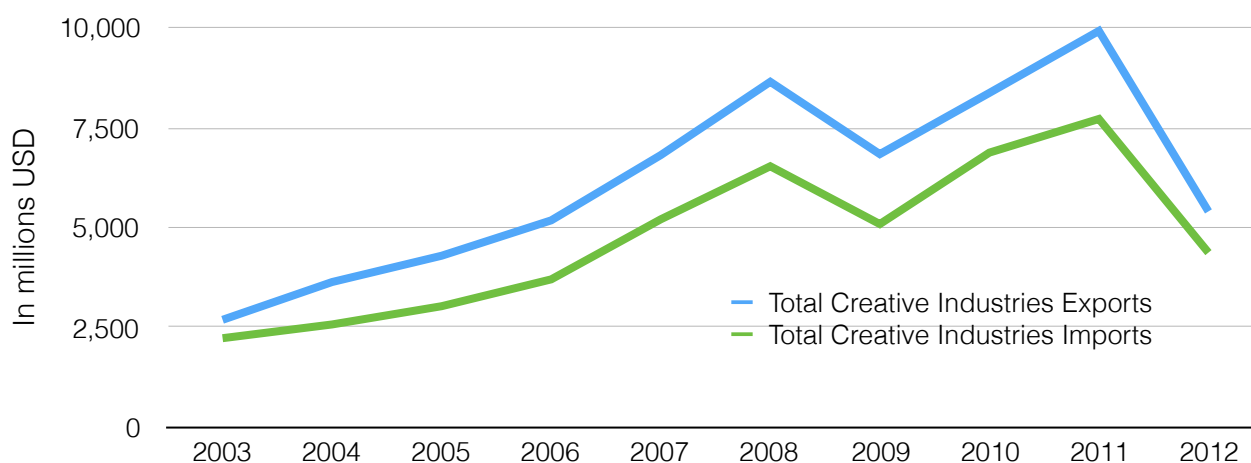
4. In Poland, cultural industries are an important component of the cultural sector what effects in a richer and more diverse cultural offer, to which an access is facilitated by the developed network of the cultural institutions, modern technologies and media. Poland separates cultural from creative Industries on the basis of economic turnover and their role in growth.
5. Poland's tourism industry enjoys continues and a rising visitor count since 2013 and beyond, although changes in tourist demographics raise some question marks as whether volume growth will be matched by value growth. Today's market trends show a large increase in the cultural tourism, mainly music festivals, concerts and open air events.
6. There is no specific programme *per se* linking CCIs to tourism so far in Poland. The country bases its touristic campaigns and policies on attractions linked to its rich cultural heritage which it defines as "historic, religious, industrial and architectural monuments and relics".
Poland offers nowadays an interesting panel of innovative projects and/or case-studies linking tourism to cultural institutions, cities, arts and heritage sites. However, these remain isolated cases and do not constitute yet a structured policy with that regards.
7. The overall character of Polish international cultural co-operation is determined by either specific geographical location or economic and political interest. The main groups that benefit from Polish cultural diplomacy tend to be part of influential and opinion-making circles throughout the world, mainly in the Member States of the EU. On the other hand, Polish cultural diplomacy supports co-operation with countries on its Eastern border: Ukraine, Russia and Belarus, the latter via non-governmental bodies. Poland is also engaged in multilateral co-operation with regional organisations, such as the Visegrad Group (Czech Republic, Hungary, Poland and Slovakia) and Ars Baltica.

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COUNTRY PROFILE - Poland						
Creative Industries Trade Performance, 2003 and 2012						
Poland	2003			2012		
	Value (in Million US\$)			Value (in Million US\$)		
	Exports	Imports	Balance	Exports	Imports	Balance
All Creative Industries	2,687.71	2,227.37	460.33	5,401.63	4,369.86	1031.76
All Creative Goods	2,275.27	1,267.77	1007.51	5,011.38	3,342.29	1669.10
All Creatives Services	412.44	959.61	547.17	390.24	1,027.58	637.34

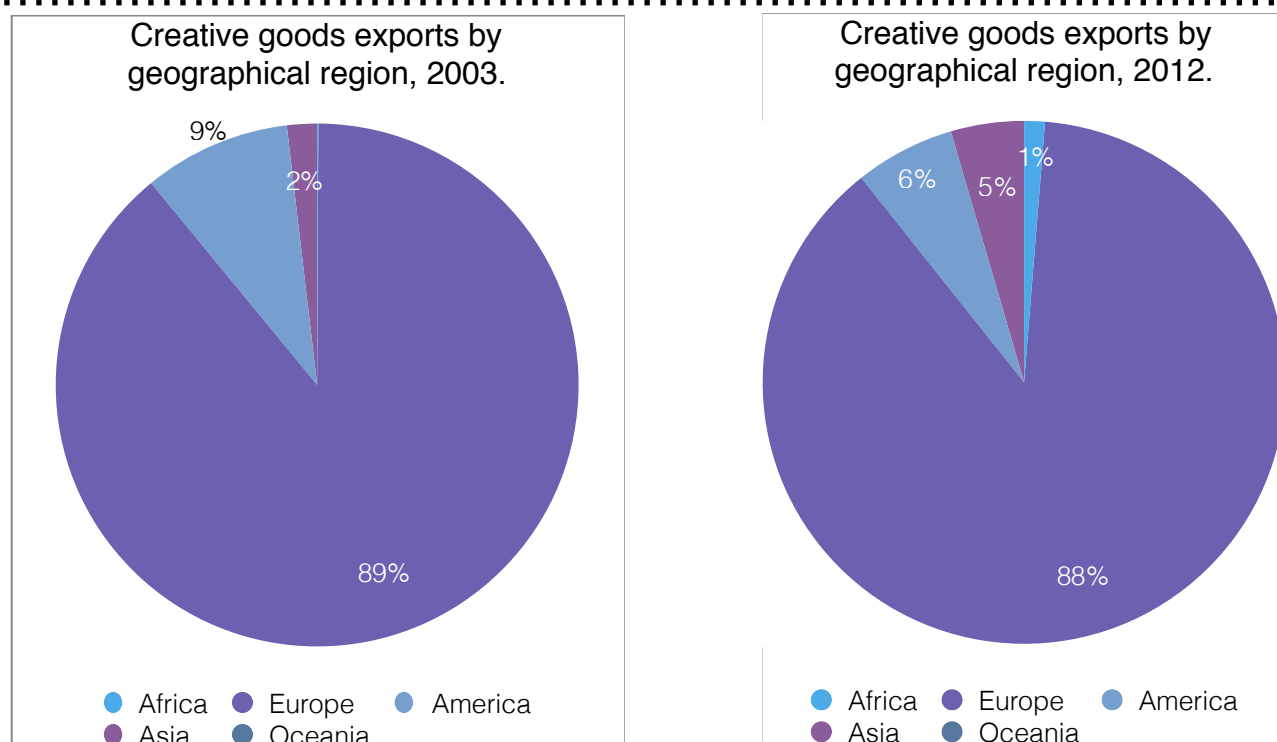
Poland: Creative Industry Trade Performance, 2003-2012.



Poland's creative industries exports and imports doubled between 2003 and 2012, with exports growing faster than imports resulting in a positive trade balance of \$1,031 million in 2012. Design, publishing, art crafts and new media are the creative goods products with a better performance in 2012. Culture is emphasised at city level, the Warsaw City Council adopted the program "Innovation Warsaw 2020". One of the goals of the cultural development program is "supporting development of creativity and promotion of culture and art, as well as development of creative industries."

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TOP 10 EXPORT PARTNERS FOR CREATIVE GOODS, 2003 AND 2012								
2003					2012			
Values in Million US \$					Values in Million US \$			
Rank	Country	Exports	Imports	Balance	Country	Exports	Imports	Balance
1	Germany	731.00	222.636	508.37	Germany	1405.87	455.72	950.15
2	United Kingdom	196.64	57.764	138.88	United Kingdom	441.14	148.38	292.75
3	United States	158.52	26.215	132.30	Russian Federation	329.91	13.56	316.34
4	France	120.90	65.092	55.81	France	294.50	54.25	240.25
5	Netherlands	95.30	41.539	53.77	Czech Republic	250.78	110.19	140.60
6	Czech Republic	88.93	51.096	37.84	United States	229.40	56.24	173.16
7	Sweden	75.17	21.713	53.46	Netherlands	205.25	175.51	29.75
8	Hungary	71.13	8.654	62.48	Sweden	178.41	80.40	98.01
9	Belgium	71.05	46.58	24.47	Italy	135.60	177.51	41.91
10	Switzerland	65.83	15.799	50.03	Belgium	128.91	66.65	62.26

Poland's most important creative goods exports market is Europe, with an 88 per cent share of total export, followed by America (6 per cent). The top five (5) export destination markets are Germany, United Kingdom, Russian Federation, France and Czech Republic.

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Appendix B. Key documents and sources

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Cultural policy making bodies

Chancellery of the Prime Minister of the Republic of Poland

<http://www.kprm.gov.pl>

Polish Ministry of Culture and National Heritage

<http://www.mkidn.gov.pl>

Polish Ministry of Foreign Affairs

<http://www.msz.gov.pl>

Polish Parliament

<http://www.sejm.gov.pl>

Professional associations

National Broadcasting Council

<http://www.krrit.gov.pl>

Polish Book Chamber

<http://www.pik.org.pl>

Polish Performing Artists Union

<http://www.zasp.pl>

Polish Visual Artists Union (ZPAP)

<http://www.zpap.org.pl>

The Authors Society (ZAIKS)

<http://www.zaiks.org.pl>

Polish Filmmakers Associations (SFP)

<http://www.sfp.org.pl/>

Union of Polish Architects (SARP)

<http://www.sarp.org.pl/>

Grant-giving bodies

Polish Ministry of Culture and National Heritage

<http://www.mkidn.gov.pl>

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Culture Foundation

<http://www.fundacjakultury.pl>

Leopold Kronenberg Banking Foundation

<http://www.kronenberg.org.pl>

Stefan Batory Foundation

<http://www.batory.org.pl/art/>

Media Desk Polska

<http://www.mediadeskpoland.eu/dofinansowania/>

Culture Contact Point

<http://www.program-kultura.eu/>

Children and Youth Foundation

<http://www.pcyf.org.pl>

PZU Foundation

<http://www.pzu.pl/?nodeid=559>

Poland

Council of Europe/ERICarts, "Compendium of Cultural Policies and Trends in Europe, 17th edition", 2015 PL-81

Pro Bono Poloniae. J&S Foundation

<http://www.jsprobono.pl/>

Cultural research and statistics

Jagiellonian University, Institute for Public Affairs

<http://www.uj.edu.pl>

National Office of State Archives

<http://www.archiwa.gov.pl>

National Digital Archives (NAC)

<http://www.nac.gov.pl/>

National Cultural Observatory

<http://www.nck.pl/kategoria/342/dofinansowania-2010--obserwatorium-kultury/pr/true>

Central Statistical Office

<http://www.stat.gov.pl/gus>

Klon/Jawor Association

<http://klon.org.pl/>

Pro Cultura Foundation

<http://www.procultura.pl>

Culture / arts portals

Adam Mickiewicz Institute

<http://www.iam.pl>

National Centre for Culture

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<http://www.nck.pl>

Polska!Year

<http://www.polskayear.pl/pl/>

Culture.pl Art portal

<http://www.culture.pl/pl/culture/>

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