

BASIC PLANNING TOOLS APPLIED IN TOURISM DEVELOPMENT STEERING AT COMMUNE LEVEL

Дано відповідь на питання, як місцева влада здатна реалізувати власні інструменти планування, спрямовані на економічний розвиток, забезпечення просторового та економічного порядку і створення туристичної привабливості місцевості. Представлено місце туризму в окремих документах з планування у туристично орієнтованих містах Польщі – Карпач і Шклярська Поремба.

In this article authors answer the, question how local authorities are capable of implementing the planning tools at their disposition and aimed at economic development, provision of spatial and economic order, especially with reference to tourism function and the establishment of tourism destination attractiveness. There is also presented the position of tourism in selected planning documents referring to tourism oriented communes – case studies of Karpacz and Szklarska Poręba communes.

An exceptional place in the process of tourism development control on the local level (e.g. level of the tourist communes) is occupied by local authorities. Their basic tasks undertaken for the benefit of territorial unit development are as follows: undertaking initiatives and tasks (resulting from planning documents) aimed at local development; stimulating local development by taking advantage of different simplifications, facilities, application of reliefs and exemptions; attracting investors and obtaining means for such development; establishing organizational structures for the support of local development (providing comprehensive service for economic entities).

Owing to the crucial role of tourism in contemporary world and its economic importance (also in local dimension) it is observed by many spatial units as the significant factor of local development. Therefore a question arises how local authorities are capable of implementing the planning tools at their disposition and aimed at economic development, provision of spatial and economic order, especially with reference to tourism function and the establishment of tourism destination attractiveness (a commune featuring an attractive tourism potential). In the process of searching for replies to the above questions two communes situated in Lower Silesia region were selected (e.g. Karpacz and Szklarska Poręba) considered by tourists as the most attractive regarding tourism and the analysis of planning tools was performed (applied in local development steering) with regard to their influence on local tourism economy development and their tourism attraction upgrading. It was assumed that stimulating tourism development in a commune depends, to a great extent, on adequate positioning of tourism problems in planning documents as well as firm implementation of the accepted goals and tasks related to it. Both the authorities and local communities do emphasize that tourism represents the most important factor determining communal economic development (tab. 1) and the variable decisive about its residents living standard (tab. 2). For this reason the problems of tourism economy play major role in general development strategies of the analyzed units.

Table 1

Tourism as the factor determining economic development of a commune (% of respondents)

| Specification | Karpacz | Szklarska Poręba |
|--|---------|------------------|
| The most important factor of communal development | 76,0 | 52,6 |
| Important factor of communal development | 24,0 | 34,2 |
| Influences development, but not as the most important factor | – | 6,6 |
| Slightly influences development | – | 5,3 |
| Insignificant factor for communal development | – | 1,3 |

Source: Authors' compilation based on survey studies conducted in 2010 among residents of Karpacz and Szklarska Poręba by the team of research workers representing WrocBaw University of Economics, The Department of Marketing and Tourism Economy Management.

Table 2

**The impact of tourism and revenues derived from it on communal living standards
(% of respondents)**

| Specification | Karpacz | Szklarska Poręba |
|---------------|-------------|------------------|
| Very big | 48,7 | 40,8 |
| Big | 50,0 | 27,6 |
| Average | 1,3 | 18,4 |
| Small | – | 7,9 |
| Very small | – | 5,3 |

Source: Authors' compilation based on survey studies conducted in 2010 among residents of Karpacz, Szklarska Poręba and Świeradów-Zdrój by the team of research workers representing Wrocław University of Economics, The Department of Marketing and Tourism Economy Management.

Having assumed that local economy is a complex system in which local authorities, using their own resources, also including local population, as well as the involvement of external partners, stimulate economic development of a given territorial unit (e. g. a commune), the key issue of such enhancement is represented by local policy instruments. The assumptions of local policy accepted by the authorities of a given territorial unit and the implemented instruments, in combination with local community activities, constitute the key factor of development and competition establishment in both local and regional scale. Among the instruments of local policy applied for socio-economic development control, at the level of basic territorial self-government unit, i.e. a commune, the following should be listed:

- planning instruments covering: the study of determinants and directions for an area spatial management, development strategy, local spatial management plan, long-term investment programme and decisions regarding zoning and land use;
- local marketing covering market analyses, localization offers preparation, commune promotion at, among others, regional, national and international exchanges and fairs, publication and editorial activities;
- data base creation about a territorial unit in different cross-sections and an ongoing monitoring of its development;
- instruments beyond the planning ones (e.g. loans and endorsements, investments in technical and social infrastructure, taxes, local fees, credits, municipal bonds, licenses, permits) (Potoczek 2003, pp. 167–168, Meyer 2004, pp. 368– 388).

Tourism represents the crucial socio-economic development factor for communes featuring attractive tourism advantages and an indispensable semi-tourism and tourism infrastructure. A broad spectrum of activities taken up in order to support tourist traffic and their presence in many sectors of economy, as well as an extensive number of relations (internal and external ones), result in the fact that tourism may significantly stimulate local economy. Depending on tourism attractiveness of a given commune and tourism management characteristic for it, tourism may act as the factor polarizing, or stimulating local development (Kornak, Rapacz 2001, p. 35). The role of local authorities consists in steering local tourism economy development which may, to a great extent, influence local development of a territorial unit. The core concept of local development, in which tourism and tourism economy play crucial roles, consists in the following: taking advantage of local community activities aimed at the benefit of this sector development; more effective implementation of local resources and factors which determine the development of tourism; stimulating and involving private entrepreneurship in tourism and creating adequate climate for socio-economic development of a commune; overcoming barriers persisting in local economy and mainly in tourism sector; support for and taking advantage of local community and private investors' activities for developing innovations in tourism; support for sustainable development with its particular influence on tourism branch development in the area of a territorial unit.

Within basic territorial self-government units, i.e. communes, in which tourism constitutes the leading sector of economic activities and does influence significantly their functioning, programming and local development planning should be subject to this dominating function. For this reason such planning instruments should be implemented which are supposed to provide the background for operations suitable for tourism

economy entities as well as other companies indirectly related to tourism traffic service and which, at the same time, respect the rule of spatial and economic order.

The implementation of planning instruments for local development steering, having considered the dominating role of tourism oriented function, should mainly guarantee as follows (Meyer 2004, pp. 369-371): analysis of the existing, in a given a commune, natural and socio-economic determinants including its development opportunities which also refer to tourism; specification of tourism development directions and the related activities, having considered both social and economic needs of a commune (their relations with areas adjacent to a given commune, with regard to the complex nature of a tourism oriented product); specification of the objective and rules for a commune area management applying sustainable development paradigm; elimination or reduction of conflicts resulting from a commune area usage for the benefit of tourism function development; education in the perspective of communal spatial and economic structure which ensures the most beneficial economy development for local community, favourable living conditions as well as economical and rational implementation, both currently and in the future, of all environmental components.

For the needs of the hereby study the analysis of selected (most important) planning documents, referring to two communes of Lower Silesia region, was performed. These units are characterized by high tourism potential, long traditions related to rendering services for tourists and, at the same time, are also among the most frequently visited areas of this region.

The conducted research indicated that the listed communes have numerous planning documents at their disposition which – directly or indirectly – cover the problems of tourism development. Among these documents the following are listed: development strategies for particular communes, studies of determinants and spatial management directions, long-term investment plans, programmes (plans) for towns/communes revitalization, environment protection plans including waste management plans, local development plans, location regeneration plans (only Karpacz), promotion strategy (only Szklarska Poreba).

Karpacz and Szklarska Poreba (the communes in Jelenia Góra district) were also covered by a common, specialized tourism development strategy, prepared for all units in Jelenia Góra rural district (10 communes) and Jelenia Góra – the town holding rights of a magistrate district. «*The strategy of tourism development in Jelenia Góra town and Jelenia Góra district*» presents guidelines regarding tourism development support more for The District Office than for particular communes in the district.

In this article we focus on the local development strategy, which represents the basic planning document in any territorial self-government unit. These strategies for both communes (e.g. Karpacz and Szklarska Poreba), apart from a diagnostic part concluded by final remarks based on SWOT analysis, also include a planning part within the framework of which the analyzed units defined their missions, long-term strategic and operational goals (tab. 3) and selected the specific development variants. Analyzing missions defined in the strategies of the discussed communes it has to be pointed out that in case of every unit, the significance of tourism was emphasized in relation to its development. The missions of the tourism oriented function represents a distinctive priority. In case of the these communal development strategies, both in the set of strategic goals and operational ones, there are relatively more tasks directly related to the tourism function. In Karpacz one of the two priorities is directly focused on tourism, the same refers to one of the four primary goals, two out of eight secondary goals and 17 out of 42 operational goals (referred to as directions in the strategy), while in case of Szklarska Poreba included tourism economy issues in three out of five strategic goals and 5 out of 17 operational goals. It is also worth emphasizing that in case of Karpacz in 2011 the updated draft of strategy currently in force was prepared and covers the period till 2013. Its content refers to three domains only, i.e. tourism, sport and culture (tab. 3). While analyzing the suggested strategy update it seems that the end of planning period was not the only reason for elaborating it. The more convincing reason for the draft preparation, long in advance, is definitely the communal planning process subject to ongoing improvements as well as the growing awareness of town authorities regarding future vision of the commune and also the perception of the need for introducing changes related to both the mission and strategic directions. The mission and goals included in the update follow, to a much greater extent, the principle of SMART goals effective determination and are much better adjusted to the town specific nature.

The position of tourism in the mission and goals of the studied communes
in the perspective of their development strategy

| Commun | Mission | Strategic goals | Operational/detailed goals |
|--------|---|--|--|
| 1 | 2 | 3 | 4 |
| | In accordance with Karpacz commune development strategy for the period of 2005–2013 | | |
| | Karpacz – the commune friendly for residents and investors, providing an interesting offer for tourists taking advantage of sightseeing and recreational values of The Karkonosze Mountains eastern part. It prides itself in well known and transparent local authorities taking great care of residents safety and meeting their needs. | <p>Priority 1: Undertake activities focused on technical infrastructure construction and modernization.</p> <p>Priority 2: Undertake activities aimed at the construction of infrastructure for recreation and leisure.</p> <p>Primary and secondary goals:</p> <ol style="list-style-type: none"> 1. Undertake activities for the residential substance revitalization (P). 2. Extend cultural and entertainment offer for city residents and tourists (P). 3. Activities for internal communication improvement (P). 4. Undertake activities for the construction and modernization of road infrastructure (P). 5. Undertake activities in order to increase integration and the sense of belonging to local community (S). 6. Take better advantage of the presence in EU structures and opportunities related to obtaining means from structural funds (S). 7. Support the entrepreneurship of local community (S). 8. Take advantage of the city location within the area of Karkonoski National Park (S). 9. Undertake activities focused on taking advantage of along the country border location (S). 10. Extent tourist offer of Karpacz (S). 11. Undertake activities for reducing unemployment and its negative effects (S). 12. Undertake activities aimed at free time management for children and teenagers (S). | <p>(out of 42 goals only these directly related to tourism are presented)</p> <ol style="list-style-type: none"> 1. Ski pistes and toboggan runs. 2. Indoors, multifunction sports facilities (sports hall). 3. Outdoors recreation and leisure centres. 4. Summer theatre – the proposal for professional and amateur theatres. 5. Cyclical artistic events (cyclical) establishing their traditions and brand (festivals). 6. Take advantage of the presence of famous individuals representing culture, science and politics in the organization of meetings with residents and tourists. 7. Safeguarding and protecting the existing natural and landscape values. 8. Creating common projects (products) Karpacz – Karkonoski National Park Board. 9. Joint promotion of the town and Karkonoski National Park. 10. Karpacz promotion in The Czech Republic tourist locations situated along the country border. 11. Creating components (areas) for revitalization (sports events) in order to improve Karpacz attractiveness. 12. Joint cultural events at both sides of the country border. 13. Reactivation of recreational and leisure facilities. 14. Establishing the distinctive brand of Karpacz. 15. Active promotion of Karpacz in the country and abroad. 16. Support for all entities functioning in the town for the benefit of cultural development and its promotion by local authorities. 17. Playgrounds equipped with outdoors sports facilities. |
| | In accordance with the suggested update of Karpacz commune development strategy for the period of 2005–2013 in order to prepare strategic directions for Karpacz commune development in the period of 2013–2020 | | |

Table 3

| 1 | 2 | 3 | 4 |
|-------------------------|---|--|---|
| | <p>Karpacz – the exceptional and naturally beautiful town situated in The Karkonosze mountain range, at the bottom of Sniezka Mountain, the legendary seat of Liczyrzepa – The Mountain Ghost. Tourist, economic and cultural development is based on the abundance of local resources and traditions and occurs in the atmosphere of mutual trust and cooperation, in the synergy of the neighbouring communes, with respect to unique and original local landscape, architecture and infrastructure. Karpacz is the place for family recreation, active tourism, sport, friendly space for cultural activities and everyday life.</p> | <p>Main goal: The establishment and dissemination of new, diversified, cohesive, integrated and coordinated tourist, cultural, recreational and sports offer as the area stimulating social, economic and public life development.</p> | <ol style="list-style-type: none"> 1. Taking increased advantage of local human resources (artists, athletes, leaders) and cultural ones based on Liczyrzepa – The Mountain Ghost, St. Lawrence, lab workers, mining heritage or sports and tourist traditions in order to extend and diversify tourism and social offer. 2. The establishment of cohesive and long-term development policy and offer regarding recreation, sport, culture, tourism and the related cohesive sport, cultural and tourism infrastructure management (accompanied by social acceptance). 3. Initiating activities aimed at the significant improvement of usage and technical condition of the existing infrastructure, using natural advantages and creating new, indispensable, modern recreational, tourism, sport and cultural infrastructure, including investment proposals in the overall cohesive town development policy regarding sport, tourism and culture. 4. Improvement and unification of town aesthetics: walking paths and bike paths, parks, flowerbeds, rock gardens, etc. 5. Creating cohesive and modern promotion concept, adequate for the prepared long-term strategy, based on local resources and traditions in cooperation with the local community. |
| <p>Szklarska Poreba</p> | <ul style="list-style-type: none"> • The town characterized by high living standard of its residents, based on general access to technical infrastructure and on high level of services rendered by social infrastructure institutions; • The town is well recognized as famous, international centre for sport and tourism; • The town features harmonious spatial, social and economic system. | <p>General goal: Social, economic and spatial development harmonization, which increases life quality of local residents. Strategic goal 1: The development of tourism and recreation function. Strategic goal 2: Creating functions of the centre for winter and summer sports. Strategic goal 3: The development of town technical and social infrastructure. Strategic goal 4: Activities focused on cultural and artistic initiatives.</p> | <p><u>(out of 17 goals only these directly related to tourism are presented)</u></p> <ol style="list-style-type: none"> 1. The establishment of modern back-up for tourist traffic. 2. The creation of conditions supporting the development of SME for tourism function. 3. Activities focused on enhancing town attractiveness. 4. Development of winter and summer sports facilities. 5. The programme for culture support in town. |

Note: P – primary goal, S – secondary goal.

Source: Authors' compilation based on: Jelenia Góra development strategy, Karpacz commune development strategy, Szklarska Poreba commune strategy for sustainable development, Swieradów-Zdrój town strategy for sustainable development.

The discussion presented so far allows for concluding that local development strategy represents the basic planning document in any territorial self-government unit. All the other programmes/plans function just as its specification and, in a way, bring a commune closer towards accomplishing objectives listed in it. The significance of this document explains the concentration, in the hereby paper, on development strategies represented by the analyzed communes.

Some planning documents are of obligatory nature and therefore there is the statutory obligation to prepare them by self-government units. Among such programmes there is the case study of determinants and directions for spatial management referring to the area of a commune, which results from *The Act dated 23rd March 2003 on spatial planning and management*. The study constitutes an important component of domestic spatial planning system. It is referred to as the basis for preparing local spatial management plans (so called local plans) including both local authorities and private individuals (residents, investors) who carry out spatial operations within communal territory. It defines the directions for changes in communal spatial structure and the directions of land allocation for investments. While deciding about spatial management methods the case study also specifies directions for communal development. They may be recognized as an instrument supporting the implementation of communal development strategy, even though the latter one is not of obligatory nature. However, in order to ensure that strategic planning system, in a territorial self-government unit, is comprehensive and cohesive the due local authorities should be responsible for preparing both the adequate strategy and case study covering development directions and goals included in the strategy. This is probably one of crucial reasons for which all the analyzed self-government units prepared development strategies and while arranging strategic planning updated or initiated the update process of both determinants and case studies of spatial management directions related to a given commune. Many programmes were prepared because they are of obligatory nature (e.g. the study of determinants and directions for spatial management as well as environment protection plan including waste management plan) or they constitute the condition for the communes to apply for aid from different programmes (e.g. regional operational programmes, the so called ROP, or «*Rural areas development programme for the period of 2007–2013*»).

None of the both studied units, however, prepared its individual tourism development strategy. It may seem that in these communes in which tourism oriented functions play the key role, such documents should have been prepared. The practice of local development steering proves, however, that in the communes featuring distinctive domination of one function, the general development strategies are rather subject to this particular function and no separate programmes are created for it. Moreover, it is also beneficial for such a dominating function. This solution allows for noticing and comprehending its relations with other aspects of economic and social life in a commune and makes local authorities aware that any activities undertaken in a commune have to support the leading function. In the analyzed communes local development steering occurs under the clear pressure of the tourism focused function.

The studied communes, even though the tourist function dominates in their economy did not prepare separate strategies addressing tourism exclusively. Instead they adjust general development strategies to the tourist function. The interdisciplinary nature of tourism economy and its close relations with other economy sectors justifies tourist function planning in the general strategy, on the other hand the specific development strategies defined specifically for tourism result in the danger of planning this function in separation from the rest of development oriented problems. The practice of the analyzed self-government units confirms that the absence of a separate tourism development strategy does not automatically mean that a given commune occupies worse position at the tourist market.

One also has to keep in mind that the success of a strategy and the development of tourism in a given area does not exclusively depend on how much attention in a given strategy is paid by local authorities to tourism. It is definitely more important whether the defined goals are pursued consequently, whether the approach towards planning is flexible enough, depoliticized, based on socialization and partnership of self-government representatives, residents and entrepreneurs, but the most important factor is to select an adequate leader in a commune for the coordination, motivation and support in the process of strategy implementation.

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