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COHESION POLICY INSTRUMENTS SUPPORTING TOURISM DEVELOPMENT

Key words: cohesion policy, regional policy, tourism, European Union

ABSTRACT. The aim of the article is to discuss issues related to the development of tourism in the context of the possibility of financial support available from cohesion policy funds in the current financial perspective for the years 2014-2020. The particular attention was paid to the multifaceted nature of modern tourism and the directions of changes in the use of European Union funds, referring to the completed programming period 2007-2013. An attempt was also made to indicate the significance of tourism in the section of the national economy of Poland and in the European Union, concentrating on its interdisciplinary character. Characteristics of cohesion policy, its goals and principles of functioning were made. The article is of a review nature, which means that the authors' own materials and empirical material from the literature of the subject were used. The figures were obtained from reports published by the Chancellery of the Prime Minister of the Council of Ministers. It was found out that the amount of allocated funds for cohesion policy among all European Union countries in 2014-2020 is the highest for Poland and amounts to EUR 72.9 billion. There is an increase in the amount of funds allocated from the European Union to Poland, compared to the amount of allocated funds in the 2007-2013 perspective. It was also pointed out that the cohesion policy instruments mentioned above only indirectly contribute to the development of tourism, as the financing for 2014-2020 lacks programs and activities entirely dedicated to tourism.

INTRODUCTION

Tourism is currently an increasingly important area of life for residents of many areas, and the development of tourism is an important impulse that dynamizes the socio-economic development of the country. Its importance is reflected in the high ability to generate new jobs, improve the quality of life of local communities, increase the competitiveness of regions. At the same time, tourism contributes to the discovery of the most valuable cultural and environmental resources, the display of which enhances the internal and external image of the country, regions and towns. While maintaining an appropriate approach, the development of tourist functions, drawing attention of local communities to the most important natural and cultural assets, will support the preservation of traditional values and sustainable development.

A characteristic feature of modern tourism is the strong interdisciplinary nature of this sector. Many fields affect its development, including transport, environmental protection,

financial sector, communication, which often cause the implications of organizational, production, legal and technological nature [Bak-Filipek 2010]. The export of tourist services has a positive impact on the country's balance of payments and triggers the redistribution of income from richer to poorer regions [MSiT 2008].

The functioning of Poland in the structures of the European Union (EU) gives many Polish enterprises and entities new opportunities for economic development, and tourism and the necessary infrastructure functioning within it, has become one of the sectors benefiting from EU funds. As part of EU actions, however, there are no financial instruments entirely dedicated to financing tourism projects, which is why tourism benefits from the support offered by various European financial instruments and funds. Cohesion policy instruments are an important source of support, including regional operational programs that enable the implementation of many activities in the area of increasing the tourist attractiveness of the regions. Among these are construction, extension and modernization of accommodation and catering facilities, investments related to sports and recreation infrastructure in order to carry out active tourism services, conservation, restoration and modernization works in the field of adapting monuments for tourist purposes together with their equipment and landscaping around the facility, construction and renovation of the tourist-related base, purchase of specialized equipment, development of therapeutic and leisure activities, organization of trade and exhibition and congress centers, computerization of enterprises operating in the tourism sector, etc. [Szostak, Szpon 2014].

MATERIAL AND METHODS

The aim of the article is to discuss issues related to the development of tourism in the context of the possibility of financial support available from cohesion policy funds in the current financial perspective for the years 2014-2020. Particular attention was paid to the multifaceted nature of modern tourism and the directions of changes in the use of EU funds, referring to the completed programming period 2007-2013.

An examination of the amount of allocated funds for cohesion policy in Poland was carried out on the basis of numerical data published by the Chancellery of the Prime Minister (KPRM). The changes were assessed by comparing funds allocated to cohesion policy in the 2007-2013 and 2014-2020 perspectives.

The graphic presentation of data on funds allocated to individual EU countries has facilitated the perception of the diversity in the distribution and distribution of funds between individual members of the European community. Poland received the largest amount of funds for cohesion policy from among 28 countries in the perspective of 2014-2020 (EUR 72.9 billion), while the least - Luxembourg (EUR 0.1 billion).

TOURISM DEVELOPMENT IN THE EUROPEAN UNION

Tourism is an area that plays an important role in the socio-economic development of many EU regions. Its complexity, heterogeneity and multifacetedness provide the possibility of expansion in various spheres (social, cultural, economic, environmental,

spatial, and institutional). At the initial stage of integration, little attention was paid to tourism and there was no separate tourism policy or funding programs. The European Commission assumed that tourism should be dealt with by individual governments rather than the EU as a whole. This was mainly due to the principle of subsidiarity, according to which, the Union's tourism policy had only a few specific issues [Walasek 2009]. The decisive step towards recognizing tourism as an important field of Community policy was the declaration of the European Council of 10 April 1984 on Community policy in the field of tourism, accompanied by a statement from the European Commission entitled „Community policy in the field of tourism. Introductory guidelines” [Zawistowska 2003]. In this communication, it was stated that creating conditions conducive to the development of tourism in the Member States requires taking into account its needs in areas such as: freedom of movement and security, consumer protection, conditions for running and starting a business, transport, regional development and protection of the European natural and cultural heritage [Sidorkiewicz, Tokarz-Kocik 2013].

The EU tourism policy has a fundamental influence on the development of tourism in the country and regions. It indicates the main goals and priorities in which individual Member States should be involved, in particular central and local government administration. Although tourism is not included in the areas covered by the common EU policy, in recent years it has been increasingly perceived as an important tool in achieving its basic goals [Kirylyuk 2014].

At present, tourism is part of the EU internal market. The activities carried out in this area must be used to achieve the economic goals of as part of the current document adopted in 2010, p. „Europe 2020 A strategy for smart and sustainable development helping social inclusion.” As part of the strategy, the European Commission has taken steps to increase the competitiveness of European tourism [EC 2010], thus the use of European financial instruments for tourism needs has also to be improved.

Among the sources of financial support for tourism under the current financial perspective for 2014-2020 is the implementation of both national operational programs financed from the European Regional Development Fund (ERDF), European Cohesion Fund (ESF), European Agricultural Fund for Rural Development (EAFRD) as well as European ones, such as: “European Territorial Cooperation Program” and “European Neighborhood Instrument”.

At the regional level, as in the financial perspective covering the years 2007-2013, 16 regional operational programs (ROPs) will be implemented. In addition, in the new financial perspective 2014-2020, under the available EU funds and operational programs, the availability of cash will help support the development of tourism by financing various tasks from various financial sources – both public and private, as well as the different types of non-repayable grant support, and returnable – loan and equity - from available funds of the type: Venture Capital, Private Equity or Business Angels Network operating on the market [Grad, Ferensztajn-Galardos 2015]. The introduction of new financing instruments for undertakings implemented for the development of tourism results from the assumptions of the “Tourism Development Program up to 2020”.

“Tourism Development Program up to 2020”¹ assumes a gradual launch of new types of financing for the tourism sector, among which the framework solution will be a pilot project of Tourism Development Fund. It will be able to function as a fund established with the participation of EU funds from operational programs at the regional level, or with funds remaining at the disposal of Bank Gospodarstwa Krajowego. The launch of this type of fund may constitute an element of the creation of the so-called Intelligent Financial Instruments (IIF) to support specific specializations or sectors (in this case tourism) [MSiT 2014].

COHESION POLICY IN THE EUROPEAN UNION

The main goal of cohesion policy is to reduce the differences in the standard of living and economic development between the most and the least developed regions and to support the development of the weakest economic sectors. This policy is to contribute to achieving cohesion in the EU, which is the leading objective, in accordance with the treaty provisions. Its interpretation and practical implementation has been transforming over the years, now in connection with the implementation of the strategy “Europe 2020” [Dziembała 2016].

The principles of the Community’s cohesion policy were mostly formulated as a result of the reform of structural funds carried out in 1988 and for the first time fully applied in the 1989-1993 budget period (the so-called first Delors package). The necessity to adapt the regulations in this respect was caused by the low effectiveness of the implemented programs. Limited resources, project dispersion, lack of comprehension of regional European and national aid and deficiencies in coordination were mentioned as the reasons for the lack of effects in reducing regional disparities [Pietrzyk 2002]. The main task the Commission faced was to move away from inconsistent and uncoordinated efforts towards comprehensive and effective assistance in order to increase social and economic cohesion in the area of the European Communities.

The principles do not result from the theory, but are primarily the result of the experience gained by the European Commission and member states. They owe their previous shape to the regulations of the EU Council and the European Parliament, adopted in June and July 1999². In the previous programming period 2007-2013, cohesion policy has become a tool stimulating development investments under the convergence objective,

¹ “Tourism Development Program up to 2020” was prepared in accordance with the regulations in force in Poland, including primarily the Act of 6 December 2006 on the principles of development policy and taking into account strategic documents at the national level as part of the new development management system of the country, i.e. Long-term National Development Strategy “Poland 2030”, “National Development Strategy 2020” and 5 from 9 integrated strategies under the new national development management system. The program will be an executive document for the Strategy of Innovation and Efficiency of the Economy “Dynamic Poland 2020”.

² In Council Regulation No. 1083/2006 of 11.07.2006 laying down general provisions regarding the ERDF, ESF and Cohesion Fund in 2007-2013, the scope of the principles of the Community cohesion policy has been extended, among others for the principle of equality between women and men and the principle of sustainable development (Articles 16 and 17).

also by overcoming barriers limiting the growth, and under the “regional competitiveness and employment” objective, its role was seen in unlocking development processes [Rcf. Council No. 1083/2006 of 11.07.2006, pp. 108]. At present, cohesion policy focuses on two goals³: “investments for growth and employment” and “European territorial cooperation”. As in the previous programming period, all EU regions have been covered by financial assistance. Cohesion policy has become an investment policy designed to further stimulate economic growth, implementing the strategic priorities of the new Europe 2020 strategy (smart, sustainable and inclusive development) and closely linked to its implementation.

Cohesion policy is implemented thanks to three funds that correspond to individual operational programs:

1. European Regional Development Fund (ERDF), which implements:
 - Operational Program (OP) “Intelligent Development”.
 - OP “Digital Poland”.
 - OP “Eastern Poland”,
 - European Territorial Cooperation Programmes.
 - Technical Assistance Program
2. European Social Fund (ESF), including:
 - OP “Knowledge, Education, Development” (POWER)
3. Cohesion Fund (CF), which implements two activities: trans-European transport networks and the environment.

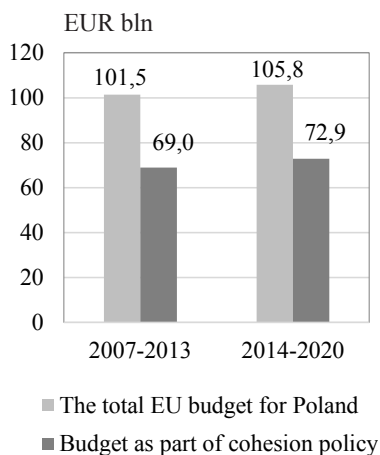


Figure 1. The volume of total funds allocated to Poland and under cohesion policy in 2007-2013 and 2014-2020 [EUR bln]

Source: own study based on KPRM

As part of the merger of funds such as ERDF and ESF, OP Infrastructure and Environment and 16 RPO are also implemented.

Poland is a leader among the largest beneficiaries of EU aid. Figure 1 shows the total amount of funds allocated to Poland. The entire EU budget for distribution for 2014-2020 for Poland is 105.8 billion euro, while in the previous perspective it amounted to 101.5 billion euro. Poland also received the highest amount of resources under cohesion policy for 2014-2020. In the previous financing period, the size of these funds was EUR 68 billion. Currently, they have been increased by EUR 3.9 billion and amount to EUR 72.9 billion, as shown in figure 2.

In December 2013. The EU Council formally approved new legislation and legislation for the next round of investment under the EU cohesion policy for 2014-2020.

In the current perspective 2014-2020, compared to the previous programming period, there has

³ In the 2007-2013 programming period, cohesion policy focused on three objectives: convergence, regional competitiveness and employment, European territorial cooperation.

been an increase in the amount of funds allocated under the cohesion policy for regional investments, innovation, ICT, SMEs and low-carbon economy, including issues related to employment, education, training, and reduction the amount of financial resources for infrastructure development has decreased [UPUE 2014], as illustrated in Figures 3 and 4. OP „Intelligent Development” replaced the OP Innovative Economy, and OP „Knowledge, Education, Development” - OP Human Capital. A new OP „Digital Poland” was also created in the new deal.

Entrepreneurs are one of the main recipients of the support offered from regional operational programs. The most important industries that will be developed thanks to investments are: electronics (HI-TEC), automotive, IT, food industry, outsourcing. In the previous financial perspective, for the first time in the history of the Community, the funds for the support of cohesion and competitiveness exceeded those allocated to agriculture and rural development.

The implementation of cohesion policy in Poland takes place through the introduction of a new system of national development management implemented on the basis of the following strategic documents: long-term and medium-term national development strategies, 9 integrated, cross-sectoral strategies [MIiR 2017]. The „National Development Strategy 2020” [Ministry of Regional Development 2012] identified areas on which funds to support development policy are to be concentrated. The „National Strategy for Regional Development 2010-2020” [MRR 2010] and „Concept of Spatial Development of the Country 2030” [Resolution No. 239 of the Council of Ministers of 13 December 2011] constitute strategic documents for national regional policy.

The basic document on the implementation of cohesion policy in Poland is the „Partnership Agreement”, which defines the strategy of interventions not only covering cohesion policy, but also the common agricultural policy, and the common fishery policy. On the other hand, financial instruments are an effective way to use the resources of cohesion policy in pursuit of the objectives of the Europe 2020 Strategy.

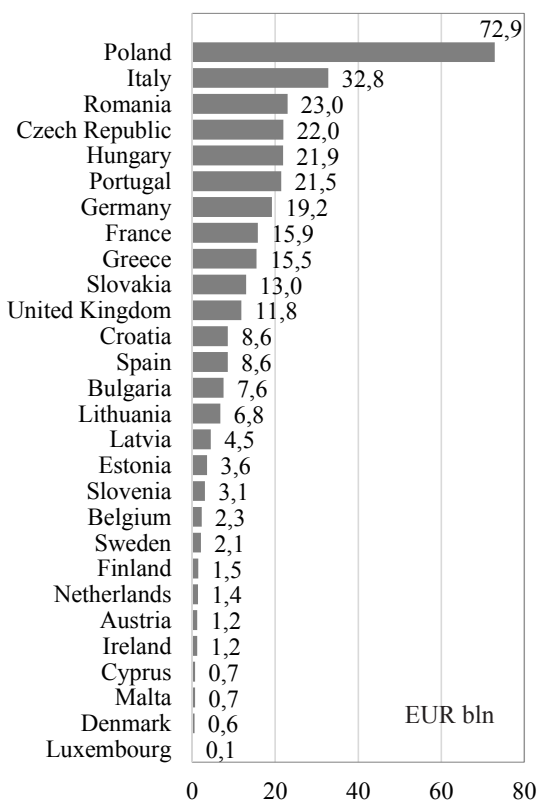


Figure 2. The volume of allocated funds for cohesion policy on EU countries in 2014-2020 [EUR bln]

Source: own study based on KPRM

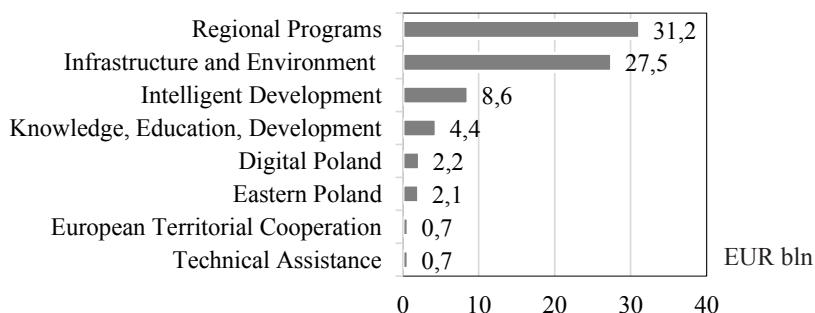


Figure 3. Size of funds allocated to Poland under cohesion policy divided into operational programs in the years 2014-2020 [EUR bln]

Source: own study based on KPRM

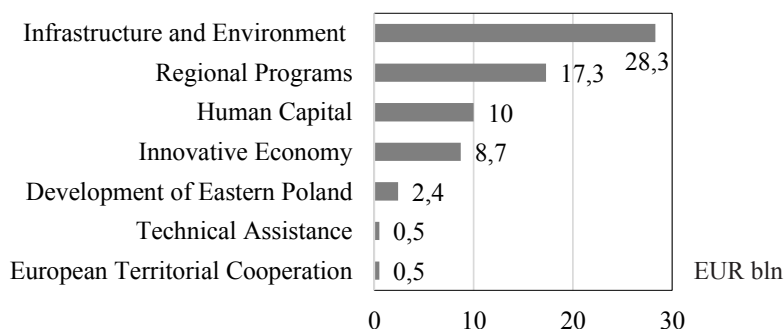


Figure 4. Size of funds allocated to Poland under cohesion policy divided into operational programs in the years 2007-2013 [EUR bln]

Source: own study based on KPRM

CONCLUSIONS

In recent years, significant changes have taken place in the objectives and directions of cohesion policy activities both in the EU and implemented in Poland in the new programming period 2014-2020. Modern or developed existing strategic documents were developed, which reflected the contemporary approach to shaping cohesion policy at both national and EU level.

Undoubtedly, EU funds are still an important source of financing for tourism. It should be emphasized that in the current programming period there is a lack of strictly available funds entirely dedicated to tourism. Available instruments of cohesion policy indirectly enable the implementation of many activities in the area of increasing the tourist attractiveness of regions through implemented operational programs, regional programs and transnational cooperation. Thanks to the EU support, it is possible to increase the tourist attractiveness by construction, expansion, modernization of accommodation and catering facilities, investments related to sports and recreation infrastructure, conservation, restoration and modernization works in the field of tourist adaptation and their facilities,

and development of areas around object, construction and renovation of a tourist-related base, purchase of specialized equipment, computerization of enterprises operating in the tourism sector, development of human resources, environmental protection and development of international tourism.

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INSTRUMENTY POLITYKI SPÓJNOŚCI WSPIERAJĄCE ROZWÓJ TURYSTYKI

Słowa kluczowe: polityka spójności, polityka regionalna, turystyka, Unia Europejska

ABSTRAKT

Celem artykułu jest omówienie zagadnień dotyczących rozwoju turystyki w kontekście możliwości wsparcia finansowego dostępnego ze środków polityki spójności w aktualnej perspektywie finansowej na lata 2014-2020. Szczególną uwagę zwrócono na wieloaspektowość współczesnej turystyki oraz na kierunki zmian wykorzystania funduszy unijnych, odnosząc się do zakończonego okresu programowania 2007-2013. Podjęto także próbę wskazania znaczenia turystyki w dziale gospodarki narodowej Polski oraz w Unii Europejskiej, zwracając szczególną uwagę na jej interdyscyplinarny charakter. Dokonano charakterystyki polityki spójności, jej celów i zasad funkcjonowania. Artykuł ma charakter przeglądowy, wykorzystano opracowania własne i materiał empiryczny z literatury przedmiotu. Dane liczbowe zostały pozyskane z raportów publikowanych przez Kancelarię Premiera Rady Ministrów. Stwierdzono, że wielkość przydzielonych funduszy na rzecz polityki spójności wśród wszystkich krajów Unii Europejskiej w latach 2014-2020 jest najwyższa dla Polski i wynosi 72,9 mld euro. Widoczny jest wzrost wielkości przydzielanych środków z Unii Europejskiej dla Polski, w porównaniu do wielkości kwot przydzielonych funduszy w perspektywie 2007-2013. Zwrócono także uwagę, że wymienione instrumenty polityki spójności jedynie pośrednio przyczyniają się do rozwoju turystyki, gdyż w finansowaniu na lata 2014-2020 brakuje programów i działań w całości dedykowanych turystyce.

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