
PARTICIPATIVE MODEL OF TOURISM DEVELOPMENT PLANNING IN A REGION OF HIGH NATURAL VALUE: A CASE STUDY OF THE POLISH CARPATHIANS

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Keywords:

- Carpathians,
- public participation,
- tourism development strategy,
- sustainable development.

Abstract:

Background: The article presents the methodology of building tourism development strategy for a region of high natural value in the context of current concepts of social participation in local development and the trends of tourism policy integration in the Carpathian region.

Material and methods: The strategy building process is presented on the basis of a case study of the Strategy of Sustainable Tourism Development of the “Magical Land of the Lemkos and the Pogorzans” for 2015-2020.

Results: The strategy was developed using the partner-and-expert method, with broad community participation at every stage of work on the document. Based on the guidelines of the Carpathian Convention, efforts were made to arrive at an agreement between different interest groups, allowing the region to stimulate its economy through tourism while preserving its natural assets.

Conclusions: The participative model of tourism planning, recommended in the article, requires a significant investment of time and funds. However, it brings benefits, as it fosters solutions based on social dialogue, acceptable for different interest groups. It also leads to higher involvement of the local residents, as well as building local partnership and cooperation networks. In the case study described in the article, the participative model enjoyed the support of the local community.

INTRODUCTION

Tourism is one of the most important economic functions of the Polish Carpathians. Its development should be planned and sustainable, in harmony with the region's traditional economic functions, and should respect the rights and needs of the local communities. Tourism development activities in areas of high natural value are a particularly significant issue in the context of rational tourism development. Conflicts between nature conservation priorities and economic interests in such areas may be reconciled through dialogue and cooperation of the representatives of various stakeholders in the process of tourism development planning. Involving the local residents in the process is crucial: they should have a genuine influence on the decisions relating to the region's development directions. The local residents' active contribution to developing ideas, exchanging opinions, discussing and arriving at solutions, prevents conflicts and mitigates the existing problems. The participants of such a process have a stronger ownership of the end result, are more willing to accept the changes related to the tourism development (such as restrictions on investment projects which

have a negative impact on the natural environment and landscape) and assume responsibility for their region's development pathways.

This article aims at presenting the process of building a tourism development strategy for a region with high natural value using the example of the *Strategy of Sustainable Tourism Development – “The Magical Land of the Lemkos and the Pogorzans” for 2015-2020* [Zawilińska et al. 2016] within the context of current concepts of social participation in the local development and the trends of tourism policy integration in the Carpathian region.

TOURISM DEVELOPMENT PLANNING IN AREAS OF HIGH NATURAL VALUE IN THE LIGHT OF CURRENT LOCAL DEVELOPMENT MANAGEMENT APPROACHES

The current trends of public governance in Europe are shifting away from hierarchical governance towards the development of network structures based on multi-level partnership of public institutions (central and local government bodies) and non-public institutions [European Governance... 2001; Izdebski 2007]. What is considered the key driving force of regional development today is the mobilisation of the endogenous potential [Pietrzyk 2001] and the emergence of grassroots initiatives based on local, often informal, cooperation networks. The shift from the hierarchical to the network model is related to the growing social activity and the increased contribution of non-public bodies in the decision-making. Co-governance is one of the fundamentals of the public governance concept, which has been developed since the early 1990's [Peters, Pierre 1998; Rhodes 1996, Rudolf 2010]. Co-governance is implemented mainly through various forms of social participation [Czekaj, Ziębicki 2014], i.e. citizens' participation in managing the issues of the community of which they are members [Hausner 1999].

Participative approach is broadly promoted in Poland. There are numerous academic studies presenting benefits from public participation in the management of local development [Czekaj, Ziębicki 2014; Hołuj 2016a,b], as well as guidebooks presenting practical aspects of the implementation of participative procedures [e.g. Ćwiklicki, Frączek 2013; Długosz, Wygnański 2005; Hausner 1999]. However, while the mechanisms of involving local communities in development management processes are widely implemented in Poland, they are often limited to information exchange and participation through consultation [Hołuj 2016b]. By reference to the “participation ladder” concepts referring to successive levels of citizens' participation in decision-making processes [e.g. Arnstein 1969; Swianiewicz et al. 2004; Długosz, Wygnański 2005], this model may be referred to as the consultation model [Olech, Kaźmierczak 2011]. The implementation of participative processes is often perceived by central and local government bodies as a formality required by law, which makes the administrative procedures and planning efforts more lengthy and costly [Hołuj 2016b; Czekaj, Ziębicki 2014].

Difficulties in introducing active social participation models are typical for many post-communist countries [Sajó 2006]. In societies which were subject to top-down administration, participation traditions have disappeared and their reconstruction is a lengthy process [Bartkowski 2011]. The problems result both from officials' incompetence and from the citizens' attitudes towards administrations. Citizens rarely identify with either central or local governments, even elected. Authorities are perceived as regulators which limit the local communities' freedom of activity. Societies in such countries are typically distrustful towards their authorities. This is coupled with the citizens' demanding attitude and scepticism about the real possibility of having an influence on the decision-making. In such circumstances, the introduction of participative procedures proves a challenge.

In areas of high natural value, covered with various forms of legal protection, the possibilities of economic development are largely determined by regulations governing the

protection regime. According to current approaches, solutions implemented in protected areas and in their surroundings should allow reconciliation of nature conservation with economic development. As a result, the functioning of a protected area should bring benefits to the local communities. A. Phillips [2002, 2003] argued that the evolution of opinions about the purposes of introducing protection of selected areas, the functions attributed to them, and the rules governing their management led to the emergence of a new functional paradigm which provides in particular for:

- A combination of nature conservation goals with social and economic goals,
- Creation of protected areas with the support of the local residents, taking their needs into account,
- Planning the development and management of the areas by experts of various domains, with the participation of local communities,
- Diversification of funding sources,
- Including the protected areas in the broader natural context (an element of the worldwide network) and economic context.

New activity models and recommendations relating to the management of protected areas and shaping their relations with the social and economic environment (including the planning of tourism development) are broadly discussed in the publications of the International Union of Nature Conservation, including in the series *Best Practice Protected Area Guidelines* [e.g. Beltrán 2000; Borrini-Feyerabend et al. 2004, 2013; Dudley 2013, Eagles et al. 2002; Phillips 2002]. As a result of the shift in the approach to the management of protected areas, their managing entities become crucial contributors to the local development, including tourism development as one of the functions of these areas.

In Poland, the need to include the development planning of protected areas (in particular national parks, landscape parks and Natura 2000 sites) in the broader social and economic context is well perceived. Numerous authors have pointed out to the necessity of shaping local development models in such a way as to allow nature conservation to be combined with development of communes and improvement in the life of local communities [Bołtromiuk 2011; Kasprzak, Raszka 1996; Hibszer 2008; Zielińska 2013]. Work on these models should include a broad representation of local stakeholders as well as experts. Sadly, in Poland, the participative (partner-and-expert) method is not broadly used in the planning of the development of areas with high natural value. Its introduction is difficult also because of numerous local conflicts which have emerged in relation with the existence of protected areas [Dubel et al. 2013; Królikowska 2007; Niedziałkowski et al. 2012].

Most areas of high natural value are attractive tourist destinations. The development of tourism in these areas poses a risk of degradation of their natural value; at the same time though, tourism is often identified as one of the most appropriate functions to develop as, in the appropriate forms, it provides opportunities of combining economic development with the protection of the natural values. In certain cases tourism development may even foster nature conservation [Ceballos-Lascurain 1996]. In line with the sustainable development concept, tourism should be developed in such a way as not to degrade the natural values, which are the fundament of the future development, and to bring income to the local residents and satisfaction to the visitors. Therefore, in order to develop tourism sustainably, the visitors' needs and expectations must be diagnosed and the actions of many stakeholders (in particular local governments, managers of protected areas, non-governmental organisations and businesses) must be well planned and coordinated. It is crucially important that planning of tourism development should include the local communities. Local residents who participate in the process have a better understanding and ownership of the initiatives taken and consequently are more willing to contribute actively to the creation of tourism products and to serve the visitors. This, in turn, helps keep the income from tourism within the region

[Zawilińska 2010a]. The high support for the development of tourism, as evidenced in research in various areas of natural value in Poland [e.g. Mika 2013; Pawlusiński et al. 2008], is a helpful factor in involving local residents in the planning processes.

At the same time, the introduction of a tourism development model in a region through broad partnership of many stakeholders raises the question of how the cooperation is to be built and who should be the leader (initiator and coordinator) of the activities. In the practical implementation of regional governance, an important role is played by territorial partnerships, currently developing dynamically in Poland. In tourism development, local tourism organisations and local action groups are particularly important. The two types of organisations operate as public-private partnerships created through grassroots initiatives of local bodies willing to take action for local communities. They are the platform for cooperation of local government bodies, NGOs and businesses [Brańka et al. 2015; Zawilińska 2010b; Zmysłony 2007]. Such organisations are capable of defining accurately the development problems of tourism in a region, as they have insight into them from both the public-sector and the private-sector perspective [Zmysłony 2008]. Local tourism organisations focus exclusively on tourism-related issues whereas local action groups carry out projects in different aspects of social and economic development, with tourism as an important category [Brańka 2015, Brańka et al. 2015]. Local tourism organisations seem predestined for the leading role in tourism development in their respective areas [Zmysłony 2008]; however, as practical experience shows, many of them are not strong enough to play such a role [Gryszel 2006]. The intensity, extent, and effectiveness of actions which they undertake depends mostly on the commitment, resourcefulness, and efficiency of their individual members or employees [Zawilińska 2010b].

CARPATHIAN CONVENTION GUIDELINES IN TOURISM DEVELOPMENT

The 2003 *Framework Convention on the Protection and Sustainable Development of the Carpathians*, usually referred to as the Carpathian Convention, was ratified by Poland in 2006. It defined the key policy objectives for promoting the integrated approach to the Carpathians' natural and cultural heritage. Its key objective is to “pursue a comprehensive policy and cooperate for the protection and sustainable development of the Carpathians with a view to *inter alia* improving quality of life, strengthening local economies and communities, and conservation of natural values and cultural heritage”. Article 9 of the Convention relates to the promotion and development of sustainable tourism based on the exceptional nature, landscapes and cultural heritage of the Carpathians, with particular emphasis on actions in protected areas and transborder cooperation [*Framework Convention...* 2007].

Detailed issues relating to the implementation of the Carpathian Convention in tourism are laid down in the 2011 *Protocol on Sustainable Tourism to the Framework Convention on the Protection and Sustainable Development of the Carpathians*, which entered into force in Poland in 2013. Its objective is “to enhance and facilitate cooperation of the Parties for the development of sustainable tourism in the Carpathians for the benefit to present and future generations, with the objective to maximise the positive benefits of tourism to biodiversity, ecosystems and economic and social development, and of biodiversity to tourism, while mitigating negative ecological, environmental and socio-economic impacts from tourism” [*Protocol on Sustainable Tourism...* 2013].

These efforts resulted in the development and adoption in 2014 of the *Strategy for Sustainable Tourism Development of the Carpathians*, laying down the key targets for the ten-year period between 2014 and 2024. These targets relate to creating favourable conditions for tourism products and services and development of tourism management, and creating a mechanism for ongoing awareness-raising in the subject of the sustainable tourism development and management at various levels [*Strategy...* 2014].

The content of the aforementioned documents, as Mika [2015] has pointed out, shows that tourism development must not only be sustainable but must also be a way to achieve sustainability goals in social and economic development. Unfortunately though, according to Mika, the ecosystem approach, which is the underlying assumption of these documents (including their tourism-related provisions) is in conflict with the goals of tourism sector operators. Furthermore, there is a discrepancy between the holistic and integrated Carpathian-wide approach to tourism enshrined in these documents and the reality of tourism development in individual local areas [Mika 2015]. Hence, the author finds it necessary to shift the emphasis away from the holistic Carpathian perspective towards the local environment and the specific conditions of tourism development. The multitude of combinations of conditions and processes making up the tourism development translates into a number of possible solutions. Efforts should be made to select those which are conducive to the social interest and the need to preserve the spatial resources [Mika 2014].

SUSTAINABLE TOURISM DEVELOPMENT PLANNING IN “THE MAGICAL LAND OF THE LEMKOS AND THE POGORZANS”

The area of the Low Beskid Mountains (*Beskid Niski*) and its adjacent belt of Carpathian Foothills (*Pogórze Karpackie*) is the area of operation of the Local Tourism Organisation “Beskid Zielony”. This is a diverse area both in geographical and in cultural terms. With the purpose of a joint tourist promotion of the area and in order to shape its positive image, a marketing name was created: “The Magical Land of the Lemkos and the Pogorzans”. It covers areas of outstanding natural value, covered in their majority with various forms of legal protection (e.g. Magura National Park, four landscape parks, six protected landscape areas and 27 Natura 2000 sites). Also the local tangible and intangible cultural heritage is of significant value. Realising the substantial unused potential of this area as a tourist destination, “Beskid Zielony” initiated the introduction of planned tourism development, which aims, in line with the sustainable development principles, to bring economic benefits to the local residents and satisfaction to the visitors, while not leading to a degradation of the natural and cultural values.

Thanks to support from the Swiss Contribution¹, works were launched on preparing the *Strategy of Sustainable Tourism Development of the “Magical Land of the Lemkos and the Pogorzans” for 2015–2020*. Given that the development of the Strategy was initiated by an NGO, being in its foundations a cooperation platform for various groups of tourism sector stakeholders, the expert-and-partner method, envisaging a very broad participation of local communities at every stage of the process, was a natural choice for preparing the document. The Strategy was intended to be a document useful for the local communities, open for their meaningful contribution, and one which they will be able to identify with.

The new Strategy was to be in line with the provisions of the Carpathian Convention and its *Protocol on Sustainable Tourism* by combining the needs of nature conservation with efficient use of the region’s values and its harmonious social and economic development. During its preparation, a particular emphasis was to be put on developing the local people’s awareness of the wealth and significance of the natural and cultural resources, as well as the tourism-associated threats for the nature, landscape, and cultural heritage, and agreeing on tourism development principles which will help protect the region’s assets. The preparation of the Strategy was also supposed to foster a compromise between the representatives of various

¹ The action was conducted as part of the project “Carpathians Unite: Mechanism of Consultation and Cooperation for Implementation of the Carpathian Convention”, co-financed by the Swiss-Polish Cooperation Programme (the Swiss Contribution). The leader of the project was the UNEP/GRID-Warsaw Centre, a branch of the National Foundation for the Environmental Protection).

interest groups and to facilitate partnership networking between central and local government bodies and local community-based and private entities.

The work on preparing the Strategy was carried out between 2012 and 2015. The Strategy covered a compact area of 38 communes with the total surface of 3,548.2 km², located in the south-eastern part of the Małopolskie Province and the south-western part of the Podkarpackie Province.

The work on the Strategy was coordinated by “Beskid Zielony”. The organisation was responsible for contacts with the local partners, organising field research (questionnaire surveys, inventory-taking on the ground), organising workshops and receiving feedback and proposed additions to the programme documents. A team of experts (specialists in tourism, geography of the Carpathians, nature of the Carpathians and nature conservation, cultural heritage of the Carpathians, marketing, and spatial economy) was in charge of developing the framework of the Strategy and the detailed research methodology, preparing the workshop programmes and holding the workshops, preparing a study on the natural conditions for tourism development in the region, including recommendations for the Strategy, analysing results of the questionnaire surveys and other materials prepared by “Beskid Zielony” and employees of the commune administrations, preparing a strategic diagnosis, and drafting the Strategy (Table 1).

In order to include the broadest possible group of stakeholders in the process of developing the Strategy, key interest groups and local leaders were identified. Before the work started, representatives of “Beskid Zielony” held information meetings with the authorities of all communes to be covered by the Strategy, as well as other selected bodies of crucial importance for the tourism development in the area. In each communal administration, a person was delegated for participation in the preparation of the Strategy (preparation of materials, consultation). Furthermore, a meeting was held in the building of the County Administration in Gorlice, involving the expert team and representatives of tourism departments of the provincial administrations of Małopolskie and Podkarpackie Provinces, the Małopolska Tourist Organisation and the Podkarpackie Regional Tourism Board, authorities of all counties covered by the Strategy and the managers of local action groups operating in the area.

The key stage in the preparation of the Strategy was a series of consultation meetings involving representatives of local communities (all key interest groups), representing the local authorities, culture institutions, NGOs, tourism businesses, the State Forests administration, and nature conservation managers (Magura National Park, landscape parks, and regional environment protection administrations). Such meetings were held at every stage of the Strategy preparation and had the form of workshops. The participants, divided into teams of up to 20 people (grouping together representatives of various interest groups), identified the key considerations, including problem issues, related to the tourism development in the region, defined the tourism development priorities, discussed details of the implementation of individual tasks and creation of tourism products, and formulated a joint vision and strategic mission. The participation of representatives of various interest groups in the process of identifying tourism development determinants in the region (including the existing tourist products and networks) was also ensured through questionnaire surveys conducted among the participants of meetings related to the implementation of the Strategy. The institutions, organisations, and persons invited to the project could also submit their comments via email at every stage of the Strategy preparation.

During the work on the Strategy, numerous research studies were carried out, including to identify and evaluate the determinants and the current condition of tourism development in the region. Most of the results of the research has been made available to the local communities. The experts’ opinion on the natural determinants of tourism development and

the database produced as a result of the inventory-taking on the ground (19 tables listing e.g. tourist facilities, culture sites, culture events) have both been published on the project's website (www.konwencjakarpacka.pl). Part of the results has also been published in the monograph published as part of the project, entitled *Lokalny potencjał a zrównoważony rozwój turystyki w Karpatach (Local potential and sustainable tourism development in the Carpathians)* [Szpara et al. (ed.) 2015].

Table 1. Key actions carried out in connection with the preparation of the Strategy

Work stages	Actions	Participating entities					
		Leading organisations	Experts	Representatives of stakeholders		All stakeholders	
				Local authorities	Other representatives		
Preparation stage	Defining the key premises of the Strategy	X ₂	X				
	Identification of the key stakeholder groups and local leaders	X ₂	X				
	Developing the methodology of the Strategy preparation (including detailed methodology of the research and questionnaire surveys)		X				
	Information meetings with the key stakeholders (including in particular local authorities)	X ₂	X	X	X		
Diagnosis stage	Introductory workshops: information on the project, specifying the tourism development potential and barriers	X _{1,2}	X	X	X		
	Preparing an expert opinion on the natural determinants of the Strategy implementation and the recommended actions		X				
	Questionnaire surveys among the Strategy stakeholders (including in particular tourist facility operators and representatives of tourism development associations)	X ₂		X	X		
	Preparation of a tourism database (including cultural assets, tourist facilities)	X ₂					
	Introducing additions and corrections in the database (via electronic means)			X	X	X	
	Research of strategic and planning documents of the local government bodies	X ₂	X	X			
	Questionnaire survey in commune and county administrations	X ₂		X			
	Questionnaire survey among visiting tourists	X ₂					
	Questionnaire survey among potential visitors	X ₂					
	Elaboration of the results		X				
	Strategy building stage	Workshops for defining priorities and detailed tasks in tourism development	X _{1,2}	X	X	X	
		Developing the initial framework of the Strategy		X			
Receiving feedback to the initial version of the Strategy (electronic consultation)		X _{1,2}		X	X	X	
Workshop meeting to formulate the strategic vision and mission and to discuss the formulated priorities, strategic goals and detailed tasks in tourism development		X _{1,2}	X	X	X		
Drawing up the Strategy			X				
Receiving comments, additions and rectifications to the Strategy		X _{1,2}		X	X	X	
Drawing up the final text of the Strategy			X				
Dissemination stage	Online dissemination of the Strategy	X _{1,2}	X	X	X	X	
	Wrap-up conference	X _{1,2}	X	X	X		
	Dissemination of the Strategy as a paper publication	X _{1,2}	X				

* The leading organisations were: (1) UNEP/GRID-Warsaw Centre, leader of the “Carpathians Unite” project and (2) the Local Tourism Organisation “Beskid Zielony”, responsible for the preparation of the Strategy.
Source: own work.

The database resulting from the inventory-taking was intended to be open for updates and rectifications by the local residents, who could submit their comments via an online form on the “Beskid Zielony” website. Open consultations of the Strategy were organised in a

similar manner. The full text of the Strategy was published on the project's website and emails were sent to all key stakeholders (including in particular the commune and county administrations and protected area managers), inviting their comments. The Strategy was published both online and in print [Zawilińska et al. 2016]. The document was presented and promoted during a wrap-up conference.

The participation of the local people was ensured not only in the tourism development planning stage but also in the implementation of the Strategy. Public participation in further actions is to be ensured thanks to the creation of the Pogórze-Beskidy Tourism Forum, grouping representatives of all key interest groups who have participated in the creation of the Strategy.

CONCLUSIONS AND RECOMMENDATIONS

This article is a case study of the preparation of the *Strategy of Sustainable Tourism Development of the "Magical Land of the Lemkos and the Pogorzans" for 2015–2020*. The Strategy was prepared according to the regional tourism planning model based on broad participation of the local community in every stage of the preparation process. Whether this model is practicable in a given context depends on many factors, including in particular: time and funding considerations, the type of the leading institution, the size of the area, and local social and cultural considerations.

Using the model presented here is certainly more time-consuming and costly than drawing up documents the most common way, i.e. by teams of experts, without public consultation or with a very limited contribution of stakeholders' representatives. Importantly however, the financial and time expense involved brings benefits in the long term through the development of better solutions and increased economic and social profits, as well as conservation of the region's natural and cultural assets. Based on the case study described in the article, the participative model may be found to enjoy the support of local communities, as their members, having a clear goal and identifying themselves with the tourism development issues, are eager to participate in the effort.

An analysis of literature in the area explored herein, as well as the experience obtained during the preparation of the Strategy, lead us to formulating the following conclusions and recommendations:

- Mobilisation of the endogenous potential is a key factor in development of regions; grassroots initiatives should be based on local cooperation networks, which may often be informal.
- Public participation in the management of the local development brings considerable economic and social benefits. Therefore, it should not be perceived as a formality required by law, which makes the administrative procedures and planning efforts more lengthy and costly, but as a good investment which will improve the quality of the project.
- Involving local communities in the planning process makes the people more active and aware of the region's resources and development problems. It also brings the community members closer together.
- Public participation in planning efforts greatly reduces the risk of creating a document with little relevance to reality and, consequently, with little practical usability. Local residents who participate in creating the plans have a better understanding and ownership of the initiatives taken, which makes them more willing to engage in bottom-up activities implementing the plans (such as creating tourism products and serving visitors). This, in turn, helps increase the income from tourism within the region.
- Introduction of sustainable tourism development should be based on discussion and compromise developed by various interest groups. Hence, it is crucially important to involve the representatives of various environments in the planning process.

- Many attractive tourist destinations are areas of high natural value and are covered with various types of legal protection. The managing bodies of the protected areas are crucial contributors to the local development, including tourism development, which is one of the functions of these areas. Solutions implemented in protected areas and their surroundings should allow nature conservation to be reconciled with economic development. As a result, the functioning of a protected area should bring benefits to the local communities. Consequently, it is necessary to include the development planning of protected areas (in particular national parks, landscape parks and Natura 2000 sites) in the broader social and economic context.
- In Poland, the participative (partner-and-expert) method is not broadly used in the planning of the development of areas with high natural value. Its introduction is difficult because of numerous local conflicts which have emerged in relation with the existence of protected areas. Nevertheless, local development models must be shaped in such a way as to allow nature conservation to be combined with development of communes and improvement in the life of local communities.
- Tourism, when appropriately managed, is an opportunity for combining economic development with protection of natural values; in certain cases tourism development may even foster nature conservation. In line with the sustainable development concept, tourism should be developed in such a way as not to degrade the natural values, which are the fundament of the future development, and to bring income to the local residents and satisfaction to the visitors.
- In order to introduce sustainable tourism development, the visitors' needs and expectations must be diagnosed and the actions of many stakeholders (in particular local governments, managers of protected areas, non-governmental organisations and businesses) must be well planned and coordinated.
- Local tourism organisations are predestined for initiating and coordinating joint tourism development activities in their regions, as they are able to identify and define appropriately the problems facing tourism in the region and can also serve as a platform of compromise between local governments, NGOs and businesses. However, the scope and effectiveness of actions taken by those organisations vary significantly and depend largely on their leaders' efficiency and skill in raising funds. Consequently, only strong organisations, enjoying broad support of local communities, may serve as leaders of tourism development management in a region.

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