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# Cultural, economic and social sustainability of heritage tourism: issues and challenges

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**Abstract:** Taking into consideration diverse possible areas of cultural heritage impact on socio-economic development processes, the author aims to analyse relations between heritage and tourism in the context of the challenges of sustainable development. She investigates the conditions and factors making heritage tourism beneficial to the local community in social and economic terms, while at the same time being not detrimental to the natural environment, the state of preservation of cultural heritage and the necessity of their safeguarding for future generations.

*Keywords:* cultural heritage, socio-economic development, sustainable development, heritage tourism

## 1. Introduction

Cultural heritage is readily included in numerous public (e.g., local, regional and national level) development strategies as a significant asset in contemporary socio-economic development.<sup>1</sup> Such inclusion may be regarded as a great opportunity for many territorial units and a significant chance for implementation of diverse projects linked with conservation, restoration and adaptation of heritage sites or preservation of immaterial heritage. It poses, however, an equally great challenge in terms of sustainable development of some areas, especially if a comprehensive understanding of development, comprising of both quantitative and qualitative aspects of it, is to be taken into account (Pike et al., 2007; Blakely, Leigh, 2010; Platje, 2011). Questioning the overly optimistic approach of many local and regional authorities,

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<sup>1</sup> Broadly understood cultural heritage includes tangible and intangible elements created in the past, maintained, used and interpreted by diverse actors in the present such as buildings and their groupings, artefacts, sites, landscapes, traditional activities, knowledge, way of life, etc. (Ashworth et al., 2000; Howard, 2003).

perceiving development of heritage tourism<sup>2</sup> as an easily applicable cure-all for all developmental problems, the article aims to analyze the relations between heritage and tourism in the context of the challenges of sustainable development.

An interesting possible approach to the issue may be found in the framework of the New Institutional Economics (NIE) (Furubotn, Richter, 1997; Alston, 2008; Ménard, Shirley, 2008). If an extended NIE perspective embracing not only economic performance but also “human capabilities, survival of the institutional framework and creating society’s capacity and capabilities for transitions to ecological, social and environmental sustainability (Platje, 2011: 12)” is used to analyse the issue, then not only direct economic effects of heritage tourism and linked projects have to be taken into account. Broader possible impacts of heritage on the local milieu, issues such as transaction costs, distribution of costs and incentives from heritage tourism, most efficient, both economically and from a social, cultural and economic point of view organization modes, impact of institutional frameworks, public strategies, investments and projects should additionally be considered (Alston, 2008; Platje, 2011). It should also be acknowledged that different actors may compete to use heritage resources (the issue of resource allocation) and that certain heritage tourism uses may create both positive and negative externalities which may be mitigated by institutional arrangements (Koboldt, 1997). One of the ways of looking at heritage tourism from such a perspective would involve asking what is the possible and desired, both direct and indirect, impact of formal institutions and stakeholders (e.g., public authorities at different levels, networks of private actors) on the direction of heritage tourism development (Ingram and Inman, 1996; Lapeyre, 2011). Another, examining how selected cultural tourism phenomena may enhance or inspire innovation and innovation networks (innovative systems approach in NIE (Hjalanger, 2009)).

First, the need to recognize and take into account the potential multidimensional impact of heritage on development in the context of sustainable development paradigm is elaborated (Section 2). In the following section, important factors which influence the character, direction and scope of economic and non-economic impacts of tourism linked with heritage are reviewed

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<sup>2</sup> The World Tourism Organisation defines heritage tourism as “an immersion in the natural history, human heritage, arts, philosophy and institutions of another region or country (WTO definition quoted by Timothy and Boyd, 2003: 1).” Accordingly, in this article the term heritage tourism is understood as a specific type of tourism whose offer (products, services) is based on local (regional) cultural heritage, including cultural landscapes, built environment, works of art and historic artefacts, living culture, traditions and rituals, traditional skills as well as historic ambiance and genius loci of places.

and discussed. Section 4 gives examples of best practice approaches briefly presenting some case studies from Poland, while in Section 5 some concluding remarks on the issue are presented.

## **2. Cultural heritage as a contemporary development asset**

Perceptions of the potential, importance and limits of usage of specific development resources differ depending on the applied development paradigm and the on-going evolution of development concepts. Moreover, they are not axiologically neutral but quite subjective and relative, depending on the time period, cultural context and the ethical and theoretical standpoints taken into account (Smith, 2000: 160; Sztompka, 2002: 442; Domański, 2004: 19; Platje, 2011: 26). The narrower, formerly dominating term economic growth refers to the sustained quantitative increase reflected in a growing production of goods and services, increase of income and employment in a given area. The broader concept of economic development pertains not only to the long process of quantitative but also qualitative changes in the economy (e.g., increase of diversity of goods and services offered in a given locality, their uniqueness and quality, changes in employment structure, management and production, the use of new technologies and management solutions), which may but do not have to be accompanied by quantitative changes. It is reflected in three principal ways: income changes (income of local residents, local authorities and local entrepreneurs), structural changes in the economy and changes in the standard and quality of life, including changes in the state of preservation and the quality of natural and cultural environment. Factors such as the quality of natural and cultural environment, quality of work places, embeddedness in the local economic and cultural context, long term perspectives and impacts of given projects and investments on the local economy and local community, especially their impact on quality and level of life of the local population are considered.

Taking a more recent and extensive perspective on development as a socio-economic process, changes taking place at any spatial scale should be regarded mainly with respect to their impact on the fulfillment of local needs, moving from the focus on basic, towards higher rank needs of the local community. They may pertain to the quality of the housing stock, social infrastructure – educational, recreational and cultural possibilities in a given locality, quality of educational and cultural institutions, spatial management and natural environment, type and strength of links and social relations between people (social capital) creating a part of an ‘inviting

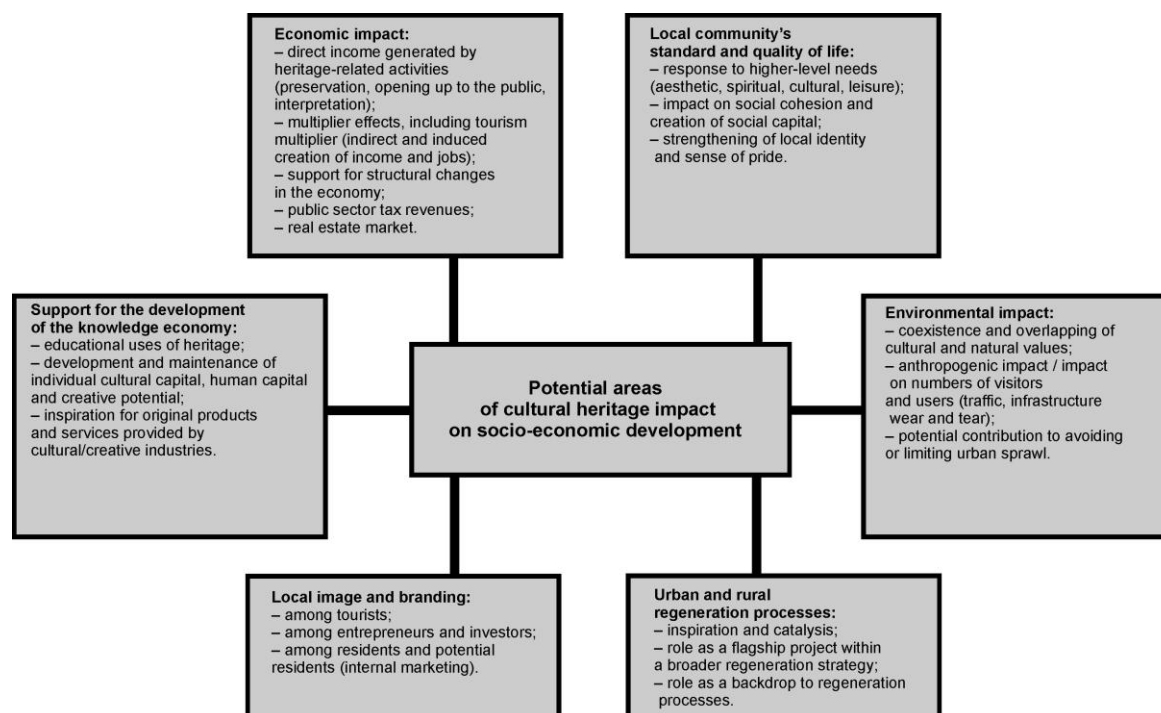
environment', which are not solely dependent on economic development (Grosse, 2002; Blakely, Leigh, 2010). As follows, Pike et al. (2007: 1263) state openly that one of the current understandings of development is "*the establishment of conditions and institutions that foster the realization of the potential of the capacities and faculties of the human mind in people, communities and (...) places.*" Throsby (2001: 72) also notices that in the last years "*a reorientation of development thinking from a uniform commodity-centred model of development towards pluralistic human-centred one*" has taken place. The most recent notion of sustainable development is even broader as it advocates cautious and responsible use of resources to ensure present day economic and social well-being without compromising their use by future generations (World Commission on Environment and Development, 1987). Its major goal is "*to strike a balance between the economic, environmental, and social necessities* (Rasoolimanesh et al., 2011: 152)," taking into account the need for intra-generational and intergenerational equity, maintaining diversity (ecologic, cultural, social) and the fact that some resources are non-renewable (Murzyn-Kupisz, 2010a). The last mentioned, most multidimensional and complex understanding of development requires taking into account not only narrow economic, but also social, cultural, ecological and political aspects of changes, exogenous and endogenous factors causing them, including considerations unique to the given spatial scale and geographical context.

As follows, if cultural heritage is to be considered a contemporary development asset, moving towards a more sophisticated understanding of development as socio-economic and sustainable development should be followed by an extension of the number and complexity of potential spheres of heritage impact on development and the inclusion of the broadest range of values in its assessment (Table 1). Accordingly, several main potential areas of impact of cultural heritage on development processes at different spatial scales (e.g., local, regional) may be distinguished (McLoughlin et al., 2005; Bowitz and Ibenholt 2009; Murzyn-Kupisz, 2012) (Figure 1).

**Table 1. Understanding cultural heritage as a development resource and the evolution of approaches to development**

Development paradigm	Approach to heritage in the context of development	Areas of heritage impact regarded as important	Methods of measuring development	Heritage values regarded as important
Economic growth	Selected aspects of heritage used for commercial purposes, in the production of goods and providing services; directly sustaining and creating workplaces mainly in the heritage institutions and tourism sector	Direct economic impact	Quantitative measures	Use values
Economic development	Broader economic potential of heritage and its role in the structural changes in the economy	Direct, indirect and induced economic impact (multiplier effects, including tourism multiplier) Development of knowledge and creative economy Image of place	Quantitative and qualitative measures	Use values Cultural values
Socio-economic development	Broader economic potential of heritage and its role in the structural changes in the economy Impact on the standard and quality of life	Direct, indirect and induced economic impact Development of knowledge and creative economy Image of place Standard and quality of life Urban/rural regeneration	Quantitative and qualitative measures	Use values Cultural values
Sustainable development	The diverse uses of heritage for the needs of both contemporary and future generations Inter- and intra-generational equity; an only partly renewable resource	Direct, indirect and induced economic impact Development of knowledge and creative economy Image of place Standard and quality of life Urban/rural regeneration Interaction with and impact on the natural environment	Quantitative and qualitative measures	Use values Cultural values Non-use values (existence, option, bequest)

Source: author's own elaboration based on Hutter and Rizzo, 1997; Avrami and Randall, 2000; Navrud and Ready, 2002; Rizzo and Towse, 2002; Howard, 2003; Greffe, 2004; Greffe et al., 2005; McLoughlin et al., 2005; Pike et al., 2007; Bowitz, Ibenholt, 2009; Blakely, Leigh, 2010; Murzyn-Kupisz and Gwosdz, 2010; Murzyn-Kupisz 2010a; Murzyn-Kupisz, 2012.

**Figure 1. Potential areas of cultural heritage impact on socio-economic development**

Source: author's own elaboration based on Hutter and Rizzo, 1997; Avrami and Randall, 2000; Navrud and Ready, 2002; Rizzo and Towse, 2002; Howard, 2003; Greffe, 2004; Greffe et al., 2005; McLoughlin et al., 2005; Pike et al., 2007; Bowitz, Ibenholt, 2009; Blakely, Leigh, 2010; Murzyn-Kupisz and Gwosdz, 2010; Murzyn-Kupisz 2010a; Murzyn-Kupisz, 2012.

Firstly, there are direct economic impacts of cultural heritage related to income and employment generation resulting from activities linked to heritage preservation, conservation and interpretation or provision of heritage services and functioning of heritage institutions (museums, libraries, archives, heritage interpretation centres). There also appear indirect and induced impacts on income, maintenance and creation of workplaces in a given municipality or region (multiplier effects), including tourism multiplier, income of the public sector as well as impacts on the real estate market. Secondly, longer term impact of heritage linked to its potential to support knowledge economy, be used as an educational resource, stimulate creativity, develop cultural capital or inspire high quality original products and services in the cultural sector, creative industries and tourism. Thirdly, the issue of standard and quality of life may be a significant area of heritage impact as it often fulfils important recreational and cultural roles for the local community. Its influence on local identity, sense of pride and belonging, inter and intra-

generational communication and social links (social capital) should also be taken into account (Murzyn-Kupisz and Działek, 2013). It may be included in programmes and projects aimed at fighting social exclusion or in endeavours linked to the social economy concept. Heritage is often an integral part of urban regeneration strategies both as an inspiration, backdrop of regeneration processes or their flagship aspect. It shapes the image of a given locality, not only for tourists and temporary visitors but also for residents, potential new residents and investors. It may impact on the ecological system of a given area, both positively inspiring a more sustainable use of space and preventing urban sprawl through “recycling” of historic, already urbanised areas but also causing a greater anthropogenic impact, attracting large numbers of visitors, increasing traffic or being linked to low energy efficiency of historic buildings and outdated heating systems harmful to the natural environment (Murzyn-Kupisz, 2010a). The impact of heritage on development may thus be of economic, social, cultural or environmental character. It may be potentially positive but neutral or even negative in practice if heritage resources are not well recognized or unsustainably used (Ashworth, 2006).

### **3. Heritage and tourism in the context of sustainable development**

Considering the links between heritage, tourism and sustainable development, it seems necessary to first point out that although one of the most obvious and most often discussed contemporary functions of heritage are its diverse tourism uses, tourism is not always positively linked to the earlier mentioned areas of impact of cultural heritage on socio-economic development. Consequently, it is just one of the options and functions of historic areas and sites but not the only nor indispensable function which may be a *raison d'être* for heritage oriented activities (Wall, 2009). Some types of heritage may not attract a broad international or national tourist audience but still perform a lot of diverse contemporary functions for the local community generating positive economic and non-economic effects. Avoiding the trap of tailoring restoration and interpretation of heritage sites and heritage services mainly towards the needs of tourists, who may or may not come depending on the economic and political situation and tourism fashions at a given time, may in fact increase the sustainability of many heritage projects, especially if there is sufficient local (regional) demand for heritage and leisure services.



Furthermore, in some cases tourism traffic may lead to the weakening and deterioration of the positive impact of heritage on some non-tourism related local development dimensions such as quality of life. In fact, if considered in detail, in some places costs related to tourism consumption of heritage may be greater than its positive impacts on the local economy or state of preservation of the historic environment (Ashworth, 2006; Girard and Nijkamp, 2009: 3). While analyzing costs and profits of a given undertaking linked with heritage, the issue of its beneficiaries, i.e., institutions, individuals and social groups should therefore be taken into account. For example too much emphasis put on transformation of heritage into a tourist commodity may lead to creation of profits and advantages for selected local social groups, e.g., these residents who have sufficient financial means to invest in tourist oriented endeavors. For other local community members the actual gains from tourist traffic may be very meager, while tourism may at the same time destroy the traditional roles and non-economic functions heritage plays in the local community life (e.g., local festivities and historic urban interiors as spaces of encounter, creating and recreating social links) (Murzyn-Kupisz and Działek, 2013). Heritage oriented activities provided mainly to tourists may also lead to limiting or even displacement of non-tourist oriented activities from the area because of rising rental and operational costs. Potential threats created by tourism to the state of preservation of the natural environment and cultural heritage should also be taken into account as well as whether, at least some, income from tourism is allocated to further heritage preservation and restoration efforts. As follows, as remarked by Girard and Nijkamp (2009: 2), cultural heritage has a *love-hate relationship with modern tourism*:

It acts as an attraction force for people from different places of origin, while it stimulates local socio-economic development and reinforces a sense of local identity and pride. On the other hand, vast volumes of tourist flows may be at odds with the ecologically benign development of localities and may negatively affect social cohesion at a local level.

In this context, a useful definition of sustainable development of tourism is offered by Butler (1993: 29):

Tourism which is developed and maintained in an area (community, environment) in such a manner and at such a scale that it remains viable over an indefinite period and does not degrade or alter the environment (human and physical) in which it exists to such a degree that it prohibits the successful development and well-being of other activities and processes.

Factors determining the long-term positive impact of heritage oriented activities on development at a given spatial scale include their long-term orientation and stability and the degree of participation of the local (regional) community both in the provision of tourism services and in making use of heritage for other purposes. Of crucial importance is also the ability of a given area to produce goods and services consumed in relation to heritage oriented activities and the links and dependences between different heritage related activities in a given area (Greffé et al., 2005: 62; Bowitz, Ibenholt, 2009).

With respect to heritage, a tourism multiplier effect takes place when visitors to heritage sites and institutions spend money not only at the particular heritage sites (direct economic effects) but also on diverse ancillary supporting tourism services. Such spending at retail establishments (souvenirs, food and beverages, books, photo articles, etc.) and on accommodation, catering, guiding, transport, leisure, beauty or sport services leads both to indirect and induced tourism multiplier effects (Archer, 1977; Vaughan, 1984; Milewski, 2007). The strength of heritage multiplier effects, including tourism multiplier, is dependent on the degree to which suppliers and employees of heritage institutions and tourism firms are recruited from the local area (retaining versus leakage of multiplier effects) and locally supplied. In addition, optimistic assessments of tourism impact do not always include significant costs generated by using heritage (e.g., more visitors lead to more repairs needed because of the wear and tear of historic sites, higher local infrastructural costs caused by the overuse of local infrastructure by non-locals) and opportunity costs of resigning from undertaking other, non-tourism related investments and projects.

The scope of economic effects is also largely dependent on the size and character of main segments of the tourism market. Tourists rather than day-trippers are preferred as multiplier effects of a tourism heritage attraction are dependent on the share of visitors who stay in the area overnight (Mules, 2001). Higher numbers of tourists do not necessarily lead to greater profits from tourism, but principally to the decrease in the quality of sightseeing, deterioration of heritage sites. This may discourage visits of tourists who pay attention to factors such as overcrowding, noise and the overall quality of heritage experiences (Caserta, Russo, 2002). The policy of attracting the greatest possible number of short term, mass visitors by low prices may thus not be truly profitable to a given site in the long term. On the other hand, it may be more advantageous to pay more attention to cultural tourists who are rather 'price insensitive'

(Nicolau, 2010), prone to make longer travels, benefit from hotel accommodation and spend more money than mass tourists (The President's Committee on the Arts and the Humanities, 2005).

Multiplier effects are thus dependent on the character of goods and services sold by tourism and heritage establishments, the type of entrepreneurs (firms) providing them and the extent to which they are locally (regionally) embedded. For example, sales of every type of souvenirs will cause some multiplier effects in the local economy but those generated by the sales of goods produced locally will tend to be higher per item sold. In the current European context, since locally made souvenirs, especially hand-made ones, are usually of better quality but are more expensive than ones imported from outside of Europe, decision on a profile of a souvenir shop means making a choice between selling fewer original, higher value added items, which benefits both the shop and the more broadly understood local producers but is risky in terms of finding wealthy enough, appreciative customers, or many low value added, mass produced ones, which surely will find mass tourist customers and bring profits to the single entrepreneur but will not generate broader economic effects in the local context.

Similarly, Hampton (2005) points to important links between the type of tourism services offered and the degree and character of engagement of local population. In contrast to 'conventional' tourism, 'new' tourism implemented in a much smaller scale, using local capital, human resources and culinary traditions, allows for the generation of much greater net profits for the local economy both because multiplier effects leakages are smaller and at the same time a smaller number of tourists poses a smaller threat to the local cultural milieu and natural environment (less pollution, traffic, noise, less frequent needs for repairs of historic structures, etc.) so it generates smaller costs to the local community (Table 2).

**Table 2. Key differences between new and conventional tourism**

Sector	New tourism	Conventional tourism
Accommodation	Guesthouses, bed and breakfasts, lodges, smaller establishments	International hotels
Catering	Local foods and specialities, food stalls or small restaurants	International standard restaurants, „international” food
Souvenirs	Crafted work, small business, local craftspeople	Mass production
Transport	Local for a smaller number of persons: minibuses, bicycles, rickshaws, horse carriages, public transport	Large coaches, rental cars

Source: (Hampton, 2005: 746), modified.

Furthermore, from a sustainable development perspective, recognizing the potential of heritage as a development resource necessitates taking into account not only material but also immaterial heritage of place such as local cultural traditions, labour culture, religious beliefs, traditional craft and production activities. All heritage tourism activities and projects should therefore be embedded in the local economic, social and cultural context if they are to have a truly positive impact on the local community and its social and economic well-being. Accordingly, Eversole (2006) distinguishes three types of usage of heritage to develop tourism, different with respect to the level of 'cultural integration' with a given locality or site, recognising that not every initiative will cause culturally integrated effects, i.e., results which answer the aims and needs of local (regional) community:

- Type 1. 'The Weaving – Integrated Use of Heritage'. Those who create and implement development strategies display a good understanding of the cultural specificity and uniqueness of a site, including intangible heritage such as local craftsmanship skills. It is up to the local community's decision to get involved in tourism related heritage activities and the aims of using heritage are not limited to income creation but include the purpose of maintaining and enhancing unique local skills and abilities as an active part of local cultural practices.
- Type 2. 'Big Things and Staged Stories – Isolated Use of Heritage'. An isolated aspect of the region's heritage is chosen and promoted to tourists. It is an authentic part of a culture of a given place but as it is withdrawn from its broader context it may no longer be relevant culturally in contemporary life. It does no longer carry any symbolic meanings for the local population and its promotion is not linked to other aspects of regional culture such as local abilities, needs or participation of the local community. This leads to the creation of spaces of 'staged authenticity' for the visitors' benefit and even if the local community feels a certain doze of pride in them it does not identify with them, while the aims and effects are usually narrowly defined, e.g., non tourist possibilities of income generation are not taken into account.
- Type 3. 'The Imaginary Region – Inventing Heritage'. Such strategies focus on invention rather than discovery of local (regional) heritage answering to externally defined needs and expectations without the necessity of any local participation or considering local skills and needs.

Positive economic effects of heritage tourism in the local context are thus dependent on the extent of involvement of the local community, its openness to accommodate or provide tourism services and the degree of its allowance to use heritage not only as the cornerstone a local identity but also as tourism attraction (Ballesteros and Ramirez, 2007). The local community's attitude towards heritage, awareness of its value and commercial potential as well as willingness to make use of it, but also agricultural, craft and entrepreneurship skills and internal financial resources influence the size and character of multiplier effects (Murzyn-Kupisz, 2012). For instance, if the local community is not knowledgeable enough and does not have sufficient financial resources required to start heritage oriented tourist businesses, it may to some extent benefit from employment possibilities in the hospitality sector created by heritage but the majority of the profits will go to externally based producers and owners of hospitality establishments (Castellani and Sala, 2009). Therefore, according to Riganti (2009: 266):

In order to be sustainable, a tourism strategy should preserve the physical integrity of the built environment which acts as a cultural attractor, enhance the quality of the tourism experience with the aim of encouraging repeat return visits and transforming day-trippers to resident tourists, and finally account for residents' quality of life.

Several other factors have to be considered to fully describe the relation and scope of impact of heritage and tourism on local development. Firstly, expecting tourism related economic effects of a given heritage project, geographical location and transport accessibility have to be taken into account (e.g., much better accessibility of Krakow or Wrocław than Zamość in the Polish context), the size of the site (e.g., its surface, size of museum collection, size of the settlement where a given heritage site is located) and the strength of its 'brand'. A well-known museum located in a large historic metropolis or a site listed on UNESCO World Heritage List usually has a greater potential to generate multiplier effects than a small local museum, though the latter may generate equally important non-economic effects (Frey, 1998). Generally speaking, the smaller a given settlement is, the more leakages of economic effects there are. In a small site (a village, a small town) with a great number of tourist visitors in comparison to its population size (a typical tourist honeypot), the direct economic effects of heritage may be significant and easily noticeable, but the much desired multiplier effects (both indirect and induced) may be much smaller than in a larger multifunctional urban centre, due to the impossibility to supply all of the needed goods, services and employees locally (Greffé, 2004). In turn in some larger

settlements heritage activities not directly tourism related may actually generate higher multiplier effects in terms of employment and income (Grefe et al., 2005: 62). Multiplier effects are in addition to a large extent dependent on the scope of investment or the ability to link different smaller sites creating a more complex tourism offer such as a tourism trail or a heritage itinerary (Gaweł, 2011). Single sites on such a path may not individually generate strong effects but considered and promoted together may convince tourists to stay longer or attract new visitors (Strauss and Lord, 2001; Murzyn-Kupisz and Gwosdz, 2010).

Seasonality of tourist traffic and income from tourism may be a problem for the local community, too. On the other hand, heritage sites visited by cultural tourists, especially those not located nearby the coast, are characterized by less average tourism traffic seasonality as compared to other sites visited by mass tourists. Flagship sites and places are however less visibly reducing seasonality than less known or less spectacular heritage sites which points to the strategic role of sites and places of 'local' or 'regional' tourist interest if tourism policy is to be aimed at decreasing seasonality (Cuccia and Rizzo, 2011). On the contrary though, in places visited by large numbers of tourists some seasonality may even be preferred by residents who want to have a chance to 'take a rest' from tourism traffic at least during some period in the year.

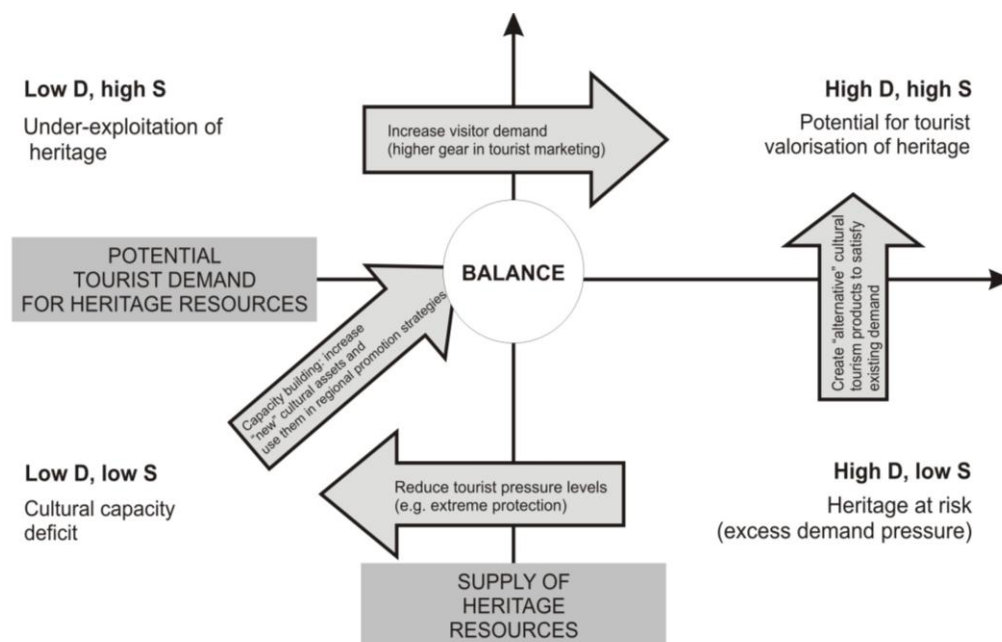
Moreover, depending on the specificity, quality and quantity of heritage and the development stage of a particular tourism destination, different challenges arise and specific ways of public involvement are required. The ESPON<sup>3</sup> project 1.3.3 entitled *The Role and Spatial Effects of Cultural Heritage and Identity (2004-2006)* proposed a typology of heritage sites and needed tourism and heritage development strategies distinguishing four different types of heritage tourism policy options (Figure 2). In the case of towns (regions) with a high supply of heritage and positive attitudes of local community towards tourism development but few tourist visits the authorities should focus on encouraging greater tourist demand through more intensive marketing and promotion activities aimed at the desired segments of the tourism market. In contrast, in places where very high tourist demand puts heritage and natural environment at risk due to excess traffic and visitor pressure, such demand should be dispersed (e.g., from the city core to less known historic quarters and sites), modified by creating and promoting alternative heritage attractions. Another alternative in this case is reducing tourist pressure by limiting access to heritage sites (e.g., introducing shorter opening hours, more strict conditions of access, charging

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<sup>3</sup> European Observation Network on Territorial Development and Cohesion.

higher admission prices). In turn in places with low potential tourist demand and relatively low supply of heritage resources which may be of interest to tourists, activities aimed at creation of new cultural assets would be needed (e.g., construction of new, exceptionally well designed, outstanding quarters or buildings, development of new, unique cultural events).

**Figure 2. Different heritage tourism policies required in different tourism demand and heritage supply contexts**



Source: (Dynamo Trans-national Group, 2006: 141).

#### 4. Sustainable approaches to heritage tourism: recent examples from Poland

Among the examples of local initiatives following an innovative, multidimensional, approach to the links between heritage, tourism and development two implemented in the Małopolska region in Poland may be referred to. For instance, in the town of Niepołomice east of Krakow a flagship heritage project of the Renaissance castle restoration into a multipurpose cultural and tourism facility has been implemented within the past two decades. It functions simultaneously as the place for local cultural activities, a museum facility, a leisure space, a hospitality and promotion centre and the most important element of the town's image. Its success and socio-economic sustainability - the castle remains an important local heritage venue while earning money for its upkeep from tourism and leisure services - stem from the recognition of the

multidimensionality of potential uses and impacts of such heritage project by the local authorities who linked several public aims such as increasing the local quality of life, improving the locality's image and creating a reason to visit the municipality or stay in it overnight, within one project (Murzyn-Kupisz, 2010b).

In turn in the municipality of Lanckorona west of Krakow to ensure that promotion of the little historic town as an ideal cultural, romantic and eco-tourism destination brings benefits to the local community, a lot of stress has been put on the promotion of locally made products and handicrafts, creation of a local souvenir shop selling such products and creation of cultural events in which both the local community and the tourists can participate, with the former taking great pride in presenting their heritage. Moreover, most heritage tourism oriented projects in Lanckorona supported with public funds (e.g., municipal, regional and EU funds) aim to involve those social groups who are in greatest danger of exclusion from the job market in a small town in a rural area, focusing especially on women and young people. For example, as a result of the participation in the European Social Fund co-funded project "Social Economy on the Amber Trail" implemented within the so-called "Equal" EU initiative, a social economy firm was established in Lanckorona in 2004. Based in one of the municipally owned historic houses in the town square, "Horizons. Inspiration, Tourism, Consulting" is a social enterprise running a local café, providing catering, tour organization, guiding and other tourism services, focused especially on the presentation of the town and its picturesque surroundings. Lanckorona is also one of the first municipalities in Poland who started implementing the idea of the eco-museum as a form of inclusion of the local community in natural and cultural heritage management (Zaręba, 2008).

In the earlier mentioned two cases the local authorities of the two municipalities are leading actors in promoting sustainable tourism as a part of the local development strategies. Similar, broader socio-economic impact may be exerted by activities of other actors such as private investors or higher level public authorities. An example is the recent success of the so-called "Valley of Palaces and Gardens" nearby Jelenia Góra in the Lower Silesia region in the south-western part of Poland. Numerous restoration projects in the area's historic palace and garden complexes leading to their adaptation for hotel and catering function do not only bring profits to particular investors but contribute to local development in diverse ways. These include preservation of the area's heritage and landscape, promotion of the area and enhancing its positive image both by individual actions and creating a cooperation network within a framework



of an non-governmental organization, strengthening local identity, attracting tourists to other venues and accommodation establishments, providing work places and generating multiplier effects to name but a few (Murzyn-Kupisz, 2012). In other places cultural institutions financed on the regional or central level may take on a key role. For instance, the rediscovery of Sejny in the Podlaskie region in north-eastern Poland as a multicultural tourism attraction has taken place mainly due to two decades of activities of the locally based cultural centre “Borderland of Arts, Cultures and Nations” co-financed by the regional authorities of the Podlaskie region and the Ministry of Culture and National Heritage with the support of the Borderland Foundation. Through innovative cultural activities the centre has uncovered much of the municipality’s cultural and heritage tourism potential, making diverse actors aware of it, leading not only to the increase in the number of tourist visitors to the municipality and its promotion as a multicultural heritage tourism site but also to positive changes in the quality of life of local residents, significant development of social and cultural capital (Sieroń-Galusek, Galusek, 2012).

## **5. Concluding remarks**

Tourism is the most obvious way of using heritage for the purpose of local (regional) development but not the only, the unavoidable nor the most sustainable one. Heritage tourism should not be seen by public authorities as the only promising function of historic areas and sites, nor the only economic activity bringing profits to the local economy, as a much more multidimensional approach to heritage as a contemporary development resource is needed. As key institutional actors, public authorities (especially local authorities) should also be aware of the multiplicity of duties awaiting for them in terms of sustainable heritage management (Schuster and de Monchaux, 1997). They range from setting the “rules of the game” by creating and enforcing heritage related laws and regulations, including spatial planning documents and giving permits and concessions for specific activity types to playing “the rules of the game” and therefore “trend setting” by implementation of carefully thought out public projects and effective, sustainable management of publically owned heritage institutions and sites. They may also include creating additional inspiring and encouraging “rules of the game”, encouraging certain activities of other actors by creating incentives for development of certain, “desired” forms of

heritage tourism activities and services, proper heritage restoration and interesting heritage presentation activities (e.g., tax breaks and allowances, grants, awards and prizes, partnerships, establishment of networking and promotion agencies, activities linked with promotion of heritage and eco-tourism).

Creating institutional frameworks and promoting a given area for heritage tourism public authorities should however be aware of the fact that the strength and scope of economic and non-economic impacts of heritage tourism on the local milieu is dependent on many earlier mentioned factors, firstly the features of the locality itself (e.g., its heritage resources, population size, needs, skills and attitudes of the local community) and on the type of tourism promoted in a given area. Moreover, effects of heritage tourism may be assessed differently depending whether they are considered from a narrow quantitative point of view and judged mainly by the number of tourists or more carefully analysed, taking into account the type of visitors, the character of their consumption and the costs of tourists' presence incurred locally. The degree of 'cultural integration' of a given heritage initiative is also important, i.e., it should be in line with the uniqueness of local built heritage, local way of life, regional and local traditions, abilities, resources and needs of diverse stakeholders, especially the local community. Both potential gains from and costs of tourism (including opportunity costs), taking into account all dimensions of development – economic, social, cultural and ecological, as well as the stage of development of tourism traffic should be considered. Seeking outcomes that are relevant to diverse stakeholders and measures of successful development may enhance both economic impact of heritage tourism (e.g., direct impact and the size of tourism multipliers) and its social meaning and sustainability.

Such a cautious approach to tourism as an opportunity for development is also advocated by international organisations as visible in the texts of the Berlin Declaration on Biological Diversity and Sustainable Tourism (1997) and The Malta Declaration on Cultural Tourism of Europa Nostra (Europa Nostra, 2006a,;2006b). In the same vein Throsby (2009) proposes three 'golden rules' to be followed (presumably by public authorities) to ensure sustainability with respect to heritage and tourism related projects. First of all, the need to 'get the values right'. A well thought out analysis of the values a particular heritage tourism project or endeavour creates, including both economic and cultural values and possible beneficial externalities is necessary prior to any undertaking. At the same time, it is important to 'get the sustainability principles right', i.e., be able to approach a heritage tourism project in a holistic way, looking at different

dimensions of sustainability such as the capacity of the project to continue to function and provide a range of benefits in the long term, intergenerational and intra-generational equity, respecting the diversity inherent in heritage, keeping the balance in natural and cultural ecosystems and recognizing interdependence between economic, social and cultural systems. Last but not least, decision makers should ‘get the analytical methods right’, i.e., be able to evaluate the impacts of heritage tourism projects from a multidisciplinary perspective, taking into account different values, outcomes, both positive and adverse effects, not only in terms of income creation but also income distribution, engagement of the local population, impact on local uniqueness and identity and the state of preservation of natural and cultural environment. Both ex ante and ex post analysis are necessary which include not only immediate effects of such projects but also their long term impact.

Looking at heritage driven tourism as a panacea for all local development problems, local and regional authorities should be aware of the above desiderata. Taking them into consideration will surely help them to encourage the creation of a high quality tourism offer based on well recognised local heritage resources and to ensure that expected economic, social and cultural outcomes, especially benefits for the local community and improvement of state of repair of heritage sites indeed take place.

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***Kulturowe, ekonomiczne i społeczne uwarunkowania zrównoważonej turystyki dziedzictwa:  
problemy i wyzwania***

***Streszczenie***

Uwzględniając zróżnicowane, potencjalne wymiary wpływu dziedzictwa kulturowego na procesy rozwoju społeczno-ekonomicznego, celem artykułu jest analiza relacji pomiędzy dziedzictwem kulturowym a turystyką w kontekście wyzwań zrównoważonego rozwoju. Rozpatrując dziedzictwo kulturowe jako współczesny zasób rozwojowy, autorka omawia warunki i czynniki, które sprawiają, iż turystyka dziedzictwa kulturowego może przynosić rzeczywiste korzyści społeczności lokalnej, zarówno ze społecznego, jak i ekonomicznego punktu widzenia, jednocześnie nie stanowiąc zagrożenia dla środowiska naturalnego, stanu zachowania dziedzictwa oraz możliwości przekazania go jako spuścizny przyszłym pokoleniom.

***Słowa kluczowe:*** dziedzictwo kulturowe, rozwój społeczno-gospodarczy, rozwój zrównoważony, turystyka dziedzictwa kulturowego