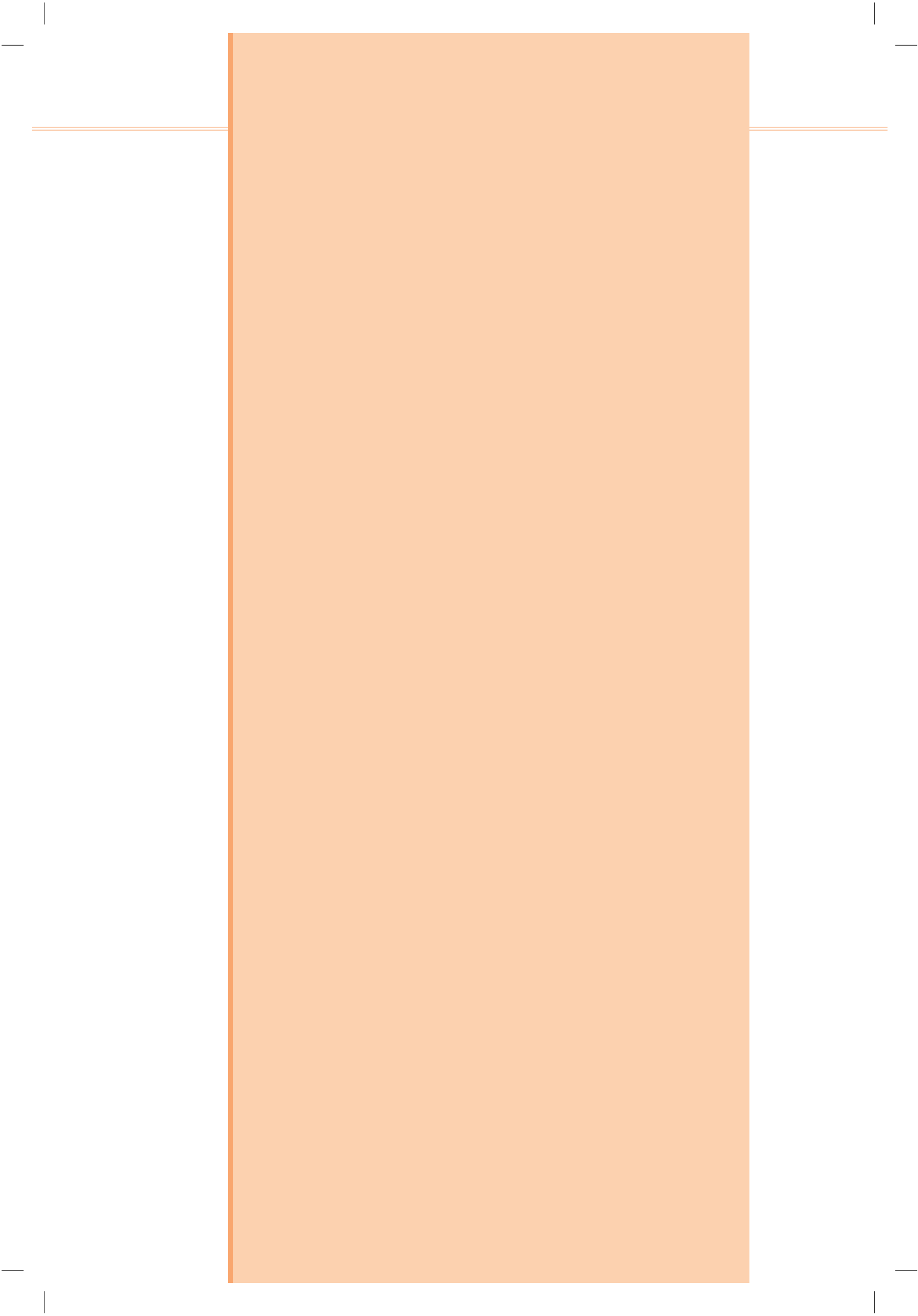


DEVELOPMENT OF TOURISM IN KRAKOW THROUGH 2013





INTRODUCTION

In recent years Kraków has boldly stepped into the spotlight of European metropolitan tourist destinations. It is regarded by tourists as one of the most attractive places in Europe. This is proven by the annual rankings of countless magazines and internet portals. A detailed account of these successes can be found on page ... of this brochure, in the section dedicated to internal conditions for tourism growth in Kraków.

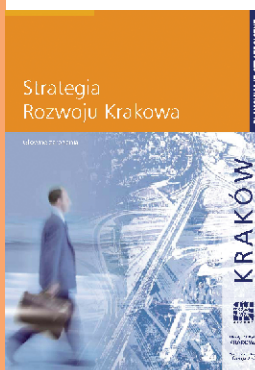
City authorities hope that at least a small part of those success can be attributed to their efforts. In 2006 the municipal government's plans were included as part of the Strategy for Tourism Development in Kraków 2006-2013. This document was then approved by the Kraków City Council as the operational program for the previously-passed Kraków Development Strategy.

The complete version of the Strategy for Tourism Development in Kraków 2006-2013 contains:

1. The introduction, including: vision for development of tourism in Kraków through 2013, methodology for creation of the document and conditions for realizing the strategy;
2. A diagnostic section, including: internal and external conditions and their consequences for the development of tourism in Kraków, SWOT analysis and assumptions for the Strategy;
3. Strategic section, including: the municipal government's tourism mission, sub-goals and priorities, detailed goals, brief description of planned activities, external sources of funding, monitoring and evaluation of strategy realization.
4. Catalogue of tasks: schedule of realization, entities responsible for their realization, potential external partners and indicators for evaluation of task realization.

Cost estimates of particular tasks are in a separate work, which is a complimentary document to the Strategy.

Further down in this brochure the reader can find the most important elements of the city's Tourism Development Strategy, such as: SWOT analysis, vision, priorities and goals for tourism development and a list of tasks whose realization will lead to achievement of the goals assumed. The section dedicated to internal and external factors concerning tourism development in Kraków is slightly more developed.





DIAGNOSIS OF THE STATE OF TOURISM IN KRAKOW IN 2006

Evaluation of the internal conditions for the development of tourism in Krakow indicates the unutilized resources of the city and the possibilities for better adjustment of its offer to tourists' needs. Comprehensive results of an analysis of the external and internal conditions are presented in the SWOT analysis. The analysis lists both the factors favourable for development of tourism in Krakow and the factors limiting it. Most elements of that analysis have been established during consultation meetings with experts, representatives of social organizations, officials, and representatives of the entities which operate on the Krakow tourist market and those which are interested in its development.

I. STRONG POINTS

- Rich historical and cultural heritage.
- Krakow's genius loci, finding its expression in the city's perception by tourists.
- Advantageous geographical location in southern Poland and the proximity to other important centres of incoming tourism.
- Very advantageous transit location within international and domestic communications traffic.
- Krakow's long-standing traditions of a cultural, scientific, and commercial centre.
- Local and regional authorities' belief in the importance of tourism for economic development of the region.
- Well-developed, modern accommodation, catering, commercial and service base, with a differentiated standard and character.
- Development of an important tourist and religious centre based on the Sanctuary of Divine Mercy in Krakow-Łagiewniki and John Paul II.



- Multi-functional character of the city.
- International airports important on a domestic scale, within the neighbourhood of the city (Kraków-Balice, Katowice-Pyrzowice).
- Large number of economic entities and organizations operating in the

sector of tourist and tourism-related services.

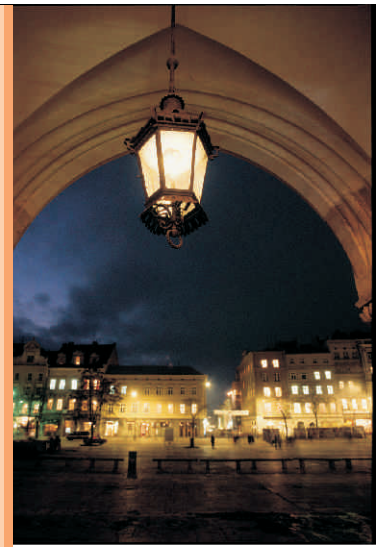
- Social resources contributing to establishment of a positive image of the city.
- Fast and frequent rail connections with Silesia and Warsaw (PKP Inter-City).
- Relatively large amount of incoming tourist traffic to Krakow.
- Well-known Krakow brand.
- Existence of tourist attractions of nationwide reputation (e.g. Market Square, bugle call from St. Mary church, Wawel Castle, Da Vinci's ady with Ermine).

II. WEAK POINTS

- Absence of premises which would allow for attracting and organizing large cultural, sports, and fair events, especially out of the summer season.
- Absence of a conference centre allowing for the organization of large congress of an international scope.
- Too low a capacity of the Kraków-Balice airport.
- Irregularities in the functioning of the internal communication system (especially deficiency of car parks) and of the communication system linking the city to other tourism centres and the tourists' places of origin.
- Delays in the execution of investments of strategic importance from the viewpoint of tourism development.
- Poor tourist infrastructure and low utilisation of the tourist potential of the districts situated in the neighbourhood of the city centre and on the peripheries compared to the centre.
- Incomplete utilisation of green areas for tourist purposes.
- Lack of management cadres qualified in the area of tourist services.
- Insufficient monitoring of the tourist phenomena in Krakow.
- Weak competitiveness and low differentiation of the offer for incoming tourism to Krakow especially compared to foreign tourism.
- Relatively high prices and low diversity in offer for incoming tourists.
- Non-adjustment of some museums perating times to the needs of the tourist traffic.
- Lack of full coordination with regard to the dates of large events and unutilised possibilities of organizing cultural events during the calendar year.
- Too slow revitalization of potentially attractive nearby city areas (e.g. Nowa Huta, Zabłocie, Kazimierz, and Stare Podgórze).

III. OPPORTUNITIES

- Increasing number of tourist trips throughout the world.
- Increased interest in the forms of tourism of a character desirable for Krakow (cultural, business and specialist tourism).
- Implementation of new solutions for transportation in the city.
- Consistent realization of a coherent policy for tourism by state institutions.
- Adoption of mechanisms facilitating international traffic among the EU countries (Schengen Treaty).
- Establishment and implementation of a tourist policy of the State.
- Possibility of an increase in domestic demand for tourist services, also on the part of elderly people.
- Possibility of acquiring EU funds for carrying out investments related to tourism and investments with an indirect impact on the development of tourism.





DIAGNOSIS OF THE STATE OF TOURISM IN KRAKOW IN 2006

- Development of modern technologies, especially information and telecommunication technologies, and the possibility of their use for improving the competitiveness of city offer and bringing the offer directly to a large number of recipients without financial outlays.
- Expansion of the Krakow-Balice airport and development of its surroundings.
- Development of transport links (road links, air links), including international ones.
- Effective acquisition of hi-tech investments.
- Development of the worship of John Paul II.
- Poland's entrance into the euro zone.
- Krakow's role as one of the cities organizing the Euro 2012 European football championship.
- Use of effective ways for presenting both the traditional and the new strong points of the city.
- Undertaking effective actions aimed at the development of new tourist products and use of modern methods for their sale.
- Changing the success measure from a quantitative to a qualitative one.
- Better utilisation of the existing network of cities cooperating with Krakow for accomplishment of the objectives related to the development of tourism.
- Allocation of the local charge revenue to the development of tourism, especially to the tourist marketing of the city, including its promotion in international markets.
- Granting of greater funds by the municipal government for tourism development and city promotions.
- Fuller adaptation of city tourism infrastructure for the disabled.
- Cooperation of strong economic entities operating on the tourism market in international promotional activities.

IV. THREATS

- Emergence of disadvantageous phenomena (political, economic, organizational and others) on the domestic and international scales, affecting the directions and the rate of economic development.
- Competition on the part of other centres of urban tourism in Europe and Poland.
- Threat of natural disasters (e.g. floods).
- Potential conflicts between the inhabitants and visitors in some parts of Krakow emerging with the increasing intensity of tourist traffic.
- Conflicts between the inhabitants obtaining financial profits from services provided to tourists and those who do not directly obtain such profits.
- Weak bonds and limited scope of cooperation within the tourist and tourism-related sectors.
- Chaotic construction, and insufficient care by the City for the landscape and architecture of the historical parts of Krakow.
- Increased awareness of the threat of terrorist attacks in Poland and throughout the world, and the resulting change in tourists' behaviour.

VISION AND MISSION

VISION: KRAKOW – A CITY GREAT IN SPIRIT

The desired image of Krakow in 2013 to a tourist has been described as follows:

- In 2013, Krakow is the greatest city in Poland and one of the most attractive cities in Europe, as well as a centre of cultural, congress and religious tourism known throughout the world.
- Krakow offers original, innovative tourist products, also in the area of active tourism, health tourism, educational tourism, and tourism enabling the pursuit of personal interests.
- The unique values of Krakow's cultural heritage (for instance, architectonic, historical, and cultural ones) have been enriched with a modern infrastructure, as well as with new buildings and institutions, e.g.: congress centre, thematic parks, modern football stadiums, entertainment and sports hall, exhibition and fair centre, spa establishments. The Sanctuary of Divine Mercy in Łagiewniki has become an important destination for pilgrimages and the venue of great meetings of believers from all over the world.
- New museums and art galleries have been established, and the existing ones have enriched their offer, contributing to the development of many new products of the cultural industry. Throughout the year, Krakow is a venue of both elite and mass cultural events.
- Areas of large importance in the tourist space of the city include the Old Town and other touristically attractive districts (Kazimierz, Nowa Huta, Podgórze, Krowodrze, etc.).
- Krakow can be conveniently reached from each European metropolis by air, rail or highways.
- The tourist sector enterprises in the city and its neighbourhood are cooperating, among others, within the Krakow Tourist Cluster, which contributes to maintaining the competitiveness of Krakow in the international market.
- Thanks to the dynamic development of tourism, including many native companies operating in the tourist market, the inhabitants' standard of living has increased.



TOURIST MISSION

Our aim is to ensure that all the needs of the people visiting Krakow are satisfied at the highest level, with the best possible utilisation of the city's potential, and to the benefit of its inhabitants.



PRIORITIES AND OBJECTIVES

STRATEGIC OBJECTIVE:

The strategic objective of the STD in Krakow until 2013 is **to increase the tourist appeal of Krakow.**

This is one of the objectives of the city's development specified in the Krakow's Development Strategy.

The main directions of tourism development in Krakow until 2013 are determined by 6 priorities and 13 detailed objectives, the accomplishment of which is to be ensured by the execution of 54 specific tasks.

ACTIONS TOWARDS ACCOMPLISHMENT OF OBJECTIVES

I.1.: Development of tourist infrastructure

1. Construction of a Congress Centre at Grunwald Place.
2. Construction of a Thematic Park in Nowa Huta.
3. Establishment of a Modern Art Museum together with a Museum of a Place.
4. Development of passenger boat connections on the Kraków - Oświęcim section of the Vistula River.
5. Expansion and modernization of the Balice Airport together with its immediate surroundings.
6. Construction of underground car parks (taking into consideration the needs of the tourist traffic - P&R system) within the PPP.
7. Revitalization of the Krakow Fortress complex.
8. Creation of a network of cultural parks.



9. Implementation of the program for development of bicycle paths and revitalization and development of the Vistula Boulevards.
10. Modernization of the buildings of the health resort in Swoszowice, together with their surroundings.

11. Development of the area around the Sanctuary of Divine Mercy in Krakow – Łagiewniki (including the construction of the John Paul II Centre).
12. Modernization of the city's football stadiums.
13. Construction of a multi-functional entertainment and sports hall.
14. Development of the region of Płaszów Camp and setting out educational paths in its location.
15. Revitalization and lighting of the Krakus Mound together with its surroundings.
16. Comprehensive revitalization of Bednarski Park, together with construction of an open-air, small concert stage with a sound shell and a bower.

I.2.: Increasing tourism-related investments and economic promotion of the city.

1. Preparation and promotion of city investment offers in the area of tourist and tourism-related infrastructure.

II.1: Raising the quality of tourist services.

1. Establishment of a system of tourist quality marks (including competitions, recommendations).
2. Development of the Convention Bureau's activities.
3. Support for the tourist sector in the area of implementing standardized quality management systems.

II.2: Ensuring high quality of tourist traffic service.

1. Development of a City Information Network.
2. Establishment of an interactive Internet network of tourist information tailored to tourists' needs.
3. Development of a system of outdoor tourist signs and a self-service tourist information network.

III.1: Raising the competitiveness of the City's leading tourist products.

1. Organization of mass cultural events with international importance.
2. Enrichment of Krakow's offer in the area of religious tourism.
3. Krakow as a city of conferences and meetings - expansion of the tourist offer.

III.2: Creation of new tourist products.

1. Development of a Krakow Register of Tourist Products.
2. For health and beauty – a tourist offer from Swoszowice and Mateczne.
3. Establishment of a Krakow museum route.
4. Preparation of a tourist offer based on entertainment centres.
5. Development of thematic proposals for sightseeing in the city.
6. Development of a tourist offer addressed to children and youth, and families with children.
7. Development of an "interests tourism" product.
8. Establishment of tourist communication routes.

III.3: Promotion of tourist products and attributes.

1. Multifarious, targeted promotional activity addressed to the external and internal markets.
2. Establishment of broader cooperation with friendly cities and organizations of which Kraków is a member, with the aim of an exchange of experiences and mutual promotion of tourist products.
3. Cooperation with tourist companies for promotion of their offers.
4. Monitoring of the effectiveness of promotional actions undertaken by the City.

IV.1: Improvement of the professional skills of the tourist traffic service staff.

1. Improvement of the professional skills of tourist, cultural and economic





PRIORITIES AND OBJECTIVES

information staff.

2. Development and implementation of a training system and other forms of improving the professional skills of Krakow city guides.
3. Training of city guards, police, security staff and city institutions personnel on tourist information and tourist traffic service (including teaching of foreign languages).

IV.2: Formation of tourist personnel for the needs of the local job market.

1. Support for actions towards establishment of higher managerial schools in the field of the hotel industry and gastronomy.
2. Establishment of a job market for the tourist sector.

V.1.: Development of tourist phenomena research.

1. Carrying out quality research on incoming tourism to Krakow.
2. Continuation of research on the volume and structure of incoming tourist traffic.
3. Improvement of the urban space from the viewpoint of its appeal for tourist traffic.

V.2.: Construction of a Tourism Monitoring System.

1. Development of tools for tourist economy monitoring, taking into consideration modern research methods.
2. Monitoring of the offer for tourism incoming to Krakow in the context of market needs.
3. Competition monitoring – good and bad practices.
4. Monitoring of the needs in the labour market for tourist and tourism-related services.

VI.1: Supporting the entities involved in Krakow's social and economic life with regard to tourism development.

1. Appointment of the Krakow Tourist Forum.
2. Establishment of the Krakow Tourism Cluster.
3. Organization of a community Incoming Tourism Forum.

VI.2: Increasing the competitiveness and potential of Krakow tourist enterprises.

1. Support for actions aimed at the development of local associations operating in the tourism sector.

MAJOR EXTERNAL AND INTERNAL CONDITIONS FOR DEVELOPMENT OF TOURISM IN KRAKOW



EXTERNAL CONDITIONINGS

1. Poland's membership in the European Union:

- new sources of law underlying the functioning of local government,
- new financing tools supporting accomplishment of the local development objectives, including the development of tourism, with consideration for the principles and priorities adopted on the European level,
- mechanisms facilitating transborder traffic to/from the EU countries,
- improvement in the image and credibility of Poland as a destination for tourist trips,
- increased difficulties in border crossing for the citizens of third countries (among others, Russia and Ukraine),
- opening of Polish skies to low-cost air carriers.

2. The progressing process of perceiving tourism as an important sector of the economy by the institutions developing law on the European and national levels, which results in increasing the volume of European Union funds allocated to carrying out tourist investments.

3. Changes in domestic legal acts and in the policy of the State, including:

- transfer of competences from the state structures to local governments (Act on tourist services),
- the activity of the institutions responsible for implementation of the State tourist policy ((Ministry of Sport and Tourism, Polish Tourist Organization) supports development of tourism on the regional and local levels.

The more essential legal acts related to the tourism activity in force in Poland are listed at the end of the brochure.

4. Further development of Krakow in that respect is to a large degree conditional upon decisions made on the national level by institutions which are not directly related to tourism (e.g., expansion of the airport in Balice, construction of motorways and express roads connecting Krakow to other cities, e.g. Rzeszów, Zakopane, Warsaw).

5. The regional authorities can be the City's partner in carrying out joint investments or undertaking other kinds of activities stimulating tourism development, especially those which also strengthen the city's metropolitan functions and contribute to improving the region's development. This will result in more rational spending of funds and greater effects from activities.

6. Globalization in the area of economic activity results in the need to face competition from foreign companies, but at the same time gives the domestic companies the chance to expand their activity to international markets.

7. Dynamic increase in the demand for tourist services.

8. China has joined the group of countries (including Germany, Japan, and the U.S.A.) which tourists most frequently come from, with regards to the

MAJOR EXTERNAL AND INTERNAL CONDITIONS FOR DEVELOPMENT OF TOURISM IN KRAKOW

world market. In Kraków, for years the top five have been Germany, Great Britain, USA, Italy and France.

9. Great prospects for the development of youth tourism (70% of the tourist traffic open especially for Central and Eastern European Countries).

10. The popularization of IT and telecommunication technologies, especially of the Internet, reduces the role of intermediaries in organizing trips, and lowers the costs of conducting promotional and information campaigns. The internet is playing an increasingly bigger role in purchases of tourist products.

11. Certain directions of changes in the international tourist market:

- increased demand for comprehensive transport services and fast access to tourists reception areas,
- increased frequency of trips, accompanied by a lesser increase in the number of people undertaking trips,
- growing interest in urban tourism, especially in cultural tourism, which is one of the basic forms of tourism in Krakow,
- decreasing demand for standard products accompanied by increased demand for authenticity, individuality, and impression of exclusivity,
- increased ecological awareness and importance of a healthy lifestyle,
- increased demand for trips integrating elements of culture and history with those of sports activity, biological renewal and entertainment, as well as educational elements, possibilities of spiritual development and pursuit of interests,



- increased share of tourists oriented at a product rather than at a region, which increases the importance of specific market segments and development of unusual tourist products,

- increased appeal of places combining historical heritage with modernity and innovativeness,
- increased importance of the service quality and travel security in forming the market offer,
- increased demand for qualified animators of cultural and recreational events, together with an efficient system of tourist information providing the necessary information at each stage of a trip's preparation and execution.

12. Increased number of undertaken trips with simultaneous shortening of their duration.

13. The most dynamically growing group of tourists become people at the post-productive age, most often well-educated and affluent ones, which results in their growing interest in a high quality offer.

14. Worldwide and domestic forecasts concerning changes in the tourist traffic volume are favourable and predict constant growth. Disturbances in the growth rate or changes in the traffic structure (including geographical ones) might be triggered by occurrence of unfavourable phenomena of the economic type (economic crises in the countries representing important sources of tourist traffic for the region, worldwide crises – e.g. fuel crisis), of the political type (e.g. terrorist acts), or of the natural type (e.g. natural disasters, epidemics).

15. Growing affluence of the Polish society results in an increase in domestic consumption in the area of tourist services, as well as an improvement of professional qualifications and the general level of education and culture.

16. Krakow's communication accessibility depends, among others, on the execution of investments of a strategic character, such as the expansion of the Balice airport, modernization and expansion of access roads, reduction in the number of regional railway connections, accompanied by an increase in incoming traffic. However, the decisions on execution of such investments is not the responsibility of the municipal government, but rather of other entities.





MAJOR EXTERNAL AND INTERNAL CONDITIONINGS

KRAKOW TOURIST RESOURCES

The possibilities for development of tourism in Krakow depend, to a significant extent, on the city's tourist attractiveness, which is determined by its tourist values (both natural and man-made ones), tourist and complementary infrastructure and communication accessibility, determining the possibilities of reaching a given area. Those values and the existing infrastructure form the basic offer being the basis for developing tourist products, which are created while keeping in mind, tourists with different travel motivations and aims. From this viewpoint, the following conditions for the development of tourism in Krakow are emphasised:

I. FASHION FOR KRAKOW

Krakow is one of the most important tourist centres in the country due to its rich cultural and historical heritage, also valued increasingly higher by foreign tourists. These attributes are currently the most important ones, but it is not only this that determines the city's attractiveness. Another factor worth noting is the large number of both cultural institutions existing in the city and the cultural events organized there.

Krakow is perceived by tourists as one of the most attractive places in Europe.

This is attested to by the annual rankings of numerous industry magazines and internet portals, such as:

- In 2005 the Project for Public Spaces – an American non-profit organization which has functioned for over 30 years to revitalize public city spaces, designated Kraków's market square as the best square in the world.
- In 2006, Kraków was placed 5th in the „Travel and Leisure” ranking of the most interesting European cities (ahead of Paris, Prague and Barcelona). The same year the American tourism giant Orbitz named Kraków as the most fashionable city in the world. Only one other European city made it into the top seven. National Geographic Traveller magazine ranked Kraków's historical centre as one of the most well-preserved UNESCO heritage sites in the world.
- In 2007 readers of the British publications „The Observer, Guardian and Guardian Unlimited” put Kraków in tenth place of the most-liked cities outside the British isles. The city also received a prestigious award from the largest industry publication, from Ireland – Travel Trade News 'The Best European Destination'. The publisher of Fromer's Travel Guides counted Kraków among the twelve „surprising, new” tourist destinations in 2007.
- In 2008 Kraków was in second place (behind Sydney, ahead of San Francisco, Singapore and Vancouver) in readers of The Guardian's (Britain) ranking of the most-liked cities outside the British Isles.
- Kraków's accommodations are top of consumer's rankings on internet tourism portals (e.g. Mama's Hostel in 2005 and Flamingo in 2007).

In tourists' opinions, the factors of paramount importance are attractions of an intangible character, such as the hospitality of its inhabitants and the city's ambience. An important role is played by human resources, including well-known figures of cultural, social, and political life. The city's name is known throughout the world and constitutes a type of brand.

Tab. Estimated number of visitors to Kraków and their spending according to estimates of the Małopolska Tourist Organization (2003-2006) and IPSOS (2007).

Year	Number of tourists (in m)	Number of visitors (in m)	Estimated total expenditure (in PLN bln)
2001	1.0	4.0	no data
2002	1.1	4.5	no data
2003	1.2	5.5	1.8
2004	1.5	6.4	2.0
2005	3.1	7.1	2.4
2006	4.4	7.5	3.5
2007	6.8	8.1	no data

A significant number of tourists indicate the Main Market Square and the Wawel Castle as the main tourist attractions. Besides the Old Town and Kazimierz, the tourists mention, among others: places related to John Paul II, the Sanctuary of Divine Mercy in Łagiewniki, Nowa Huta, Galeria Krakowska, the old section of Podgórze, Da Vinci's Lady with Ermine in the Czartoryski Museum, Rydlówka in Bronowice, the ZOO, the Botanical Garden, and the mounds – especially those of Wanda and Krak.



II. COMMUNICATION ACCESSIBILITY

On the European scale, Krakow has a strategic communication location, connecting the main tourist and transit routes (East - West, North - South). The city's relatively small distance from other Central European urban tourist centres (Prague - 525 km, Budapest - 385 km, Vienna - 430 km, Bratislava - 360 km) offers the possibility of including the city in the roundabout excursion routes across Central and Eastern Europe.



AIRWAY CONNECTIONS:

Krakow owes its spectacular success in tourism over the last years to the vigorously developing new airway connections to John Paul II International Airport in Balice, and the airport in Pyrzowice. The Balice airport is located to the west of Krakow, at the short distance of 11 km from the city centre, in the territory of the Zabierzów commune. Four independent roads lead from the center of Kraków to it, along with railway lines. City buses (no. 292, 208, 902) and a light-rail line (from the railway station) also run to the airport. There is also a direct exit from the A4 motorway to the airport. 8 mln people live within a radius of 100 km from the airport. Upon opening of the Polish skies to low-cost airlines in the year 2004, a vigorous increase in the passenger traffic started in the Balice Airport near Krakow. According to the airlines, tourists account for approx. 60% of passengers.

NUMBER OF PASSENGERS AT BALICE AIRPORT (IN M)

2002	2003	2004	2005	2006	2007
0.5	0.59	0.85	1.6	2.2	3.1

More than twenty carriers provide regular, direct connections with approx. 50 cities around the world.

Apart from the national carriers (such as Lufthansa and British Airways, as well as LOT), they include Europe's most important low-cost airline companies: Ryanair, EasyJet, Norwegian Air, Jet-Air and others.

According to studies carried out by the HNTF Corporation, commissioned by the U.S. Trade and Development Agency, passenger transport volume at the Balice Airport will reach the level of 3.8 mln people in 2015.



Kraków also has direct coach connections with the rapidly-growing airport in Pyrzowice, located a distance of 100 km north-west of the city. The number of passengers using scheduled and charter connections grew from 257,000 in 2003 to almost 2 million in 2007. In 2008 it serviced connections with nearly 30 European cities. It services the third-largest number of passengers (behind Okęcie and Balice) in Poland.

ROAD CONNECTIONS:

The most important interregional road connection for Krakow is the A-4 motorway, connecting Krakow with Wrocław via Katowice and Opole (with a total length of 290 km). It provides a comfortable connection with other cities in southern Poland, as well as with Germany and other Western European countries.

Construction of a motorway thread in the eastern direction is planned; the motorway is to connect Krakow with Tarnów, and finally with the Ukrainian border (2012). Part of the east-west motorway connection is Krakow's south ring road. Expansion of the second part of the ring road, which will connect other primary communication arteries of the city from the north, is planned as part of national road investments for the years 2010-15.

BUS COMMUNICATION:

Apart from dozens of local connections (among others, with Wadowice, Cieszyn, Zakopane, Oświęcim, Nowy Sącz, Krynica and Miechów), other locations which can be reached from Krakow by a regular bus line include the Mazurian Lakes (via Warsaw) and Pomerania via Wielkopolska. Transport companies handle international connections as well, e.g. to: Amsterdam, Antwerp, Brandisi (Italy), Breda, Brussels, Dublin, Freiburg, Flensburg, Genua, Hamburg, Köln, Copenhagen, London, Madrid, Manchester, Minsk, Murcia (Spain), Naples, Oslo, Paris, Patra (Greece), Rotterdam, Rome, Tallin, Turin, Vienna, Vilnius and Zurich.

The network is constantly being adapted by operators to the evolving needs of the market.

Construction of a bus terminal directly neighbouring the railway station in the city centre has created very comfortable connections for passengers as well as transfer possibilities. Travellers can make use of multiple means of transport (railway, bus, and – thanks to the light rail connection with Balice airport – airplane).

RAILWAY CONNECTIONS:

Due to Krakow's location, the city plays the role of a transfer point. It is here that suburban communication routes from the whole province converge (e.g. Wieliczka, Wadowice, Oświęcim and Zakopane), and journeys to the entire territory of Poland start.

The city has direct railway connections to all major cities in Poland (e.g.: an InterCity train journey from Warsaw takes 2 h 45 m), as well as with Berlin, Budapest, Bucharest (from June to August, the train also runs to Varna), Hamburg, Kiev (from June to August, the train also runs to Odessa), Lvov, Prague, Vienna, Žilín.

STRUCTURE OF TRANSPORT MEANS USED DURING ARRIVAL IN KRAKOW BY FOREIGN TOURISTS (BASED ON MOT 2003-2006 and IPSOS 2007)

Transport means	Percentage of tourists (in %)				
	2003	2004	2005	2006	2007
Plane	19	30	48	56	63
Coach	33	33	25	17	3
Car	24	20	16	16	26
Train	21	13	9	9	6
Regular bus line	1	2	1	1	2
Other	2	1	1	1	0



MAJOR EXTERNAL AND INTERNAL CONDITIONINGS

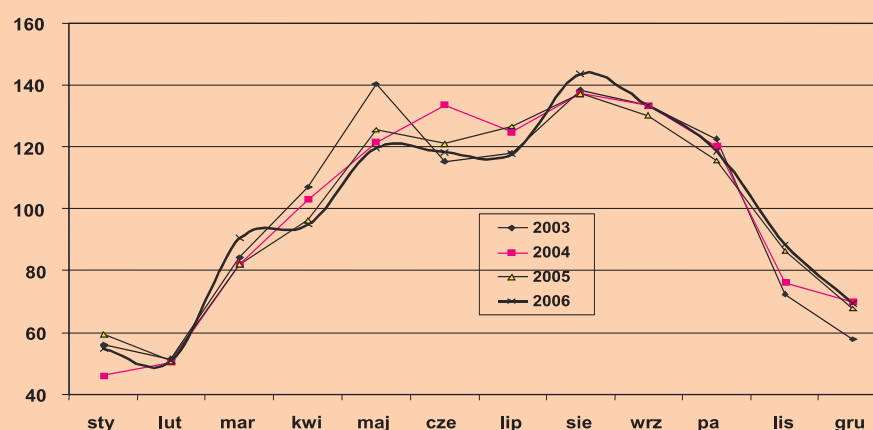
KRAKOW TOURIST RESOURCES

III. SEASONALITY OF TOURISTIC TRAFFIC IN KRAKOW

The climate conditions determine the seasonality of the tourist traffic, as strolls around the city are a common way of passing time in Krakow.

- The greatest number of cloudless days occurs in September, the least – in winter.
- The average annual air temperature in Krakow is 8.1°C,
- The highest monthly total precipitation takes place in July (approx. 100 mm), and the lowest – January and February (29 mm),
- The average annual number of days with precipitation is 170, of which the greatest number occur in June and July – 15 days average on each, and the least - in September and October - 11 days each,
- The average annual total precipitation is 665 mm,
- Winter lasts here approx. 70 days, and summer - 100 days,
- Snowfall is noted from October to April (approx. 80% in January),
- Snow cover is present 65 days per year, usually between the 1st 10 days of December and the last 10 days of March,
- West and south-west winds prevail.

SEASONALITY INDEX IN THE YEARS 2003-2006 – ALL TOURISTS



Due to the climate conditions in Krakow, the recreation season in the city lasts approximately from the beginning of April till the end of October. September is characterized by especially favourable conditions, considering the highest number of cloudless days and precipitation-free days.

IV. SERVICES

The core of what is known as a tourist product are services. The activities of developing and offering a tourist product are inherently related to the formation of a material base for the provision of these services. Without the formation of a service base (transport, accommodation, board), no increase in tourist traffic – despite the indisputable advantages of the surroundings – is possible.

Due to the dynamical development over the last years, Krakow now has a very well-developed accommodation and catering base, offering a wide range of prices, standards, and scope of services provided . Some of the relevant data is given in the tables below.

Hotels

Tab. Number of over night stays 2001-2007

Year	2001	2002	2003	2004	2005	2006	2007
The number (in thousands)	1016	1161	1235	1622	1992	2109	2406

Tab. Number of rooms 2001-2007

Year	2001	2002	2003	2004	2005	2006	2007
Rooms	3400	4360	4670	5180		5630	6700





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Tab. Number of hotels 2001- 2008 sorted by category

	2001	2002	2003	2004	2005	2006	2007	2008.06
5*	0	0	0	3	4	5	6	6
4*	7	6	6	7	6	7	9	12
3*	24	28	35	42	45	47	53	64
2*	13	11	13	16	16	20	21	23
1*	5	5	7	5	5	5	6	5

The list does not include hotels currently being categorized.

Tab. Occupancy rates in Kraków hotels and accommodation centres according to GUS

Year	No. of hotels	Occupancy (in %)	Rooms occupancy (in%)
2001	49	41	43
2002	50	38	43
2003	61	38	41
2004	73	44	50
2005	76	54	62
2006	84	54	63
2007	95	54	61

Future projects are planned in Krakow in the years 2009-2011:

- 5* - 4 new hotel and 3 change category and 1 new part of hotel (702 new rooms)
- 4* - 7 new hotel and 1 modernization new part (702 new rooms)
- 3 or 4* - 3 new hotel and 1 new part of hotel (830 new rooms)
- 3* - 4 new hotel and 1 new part of hotel (530 new rooms)
- 2* - 1 new hotel (262 new rooms)
- 1* - 2 new hotel (285 new rooms)

Apart from hotels, Kraków possesses approximately 400 other places of accommodation which are not included in any categorizations. In the summer, the city has at least 31,000 sleeping places. Apart from these, within a radius of 75 km from the centre of Kraków, approximately 40 hotels from categories of 1-4 stars possess over 1,000 rooms.

Gastronomy

There are over 3,300 gastronomic establishments functioning in Krakow (including almost 500 restaurants, 250 fast food bars, 1600 cafés and bars, 60 canteens, 500 catering companies) and over 400 small gastronomy outlets. This meets the needs of the tourists visiting the city.

The gastronomic base in Krakow is very well developed, especially in the areas of the present concentration of tourist traffic (Old Town and Kazimierz). Gastronomic establishments also concentrate within the shopping centres and along the main access roads to the city centre. Apart from the establishments serving dishes with Polish cuisine, there are also establishments that offer French, Italian, Hungarian, Greek, Mexican, Asian (Chinese, Japanese, Vietnamese, Indian), African, German, Jewish and other cuisines. They constitute an important element creating the city's ambience. Visits at the restaurants and cafés as a way of spending time are indicated by over 60% of tourists, while about 1/3 of tourists consider the use of gastronomic services as a basic element of their sojourn in the city.

City Information Network (CIN)

At present, the network consists of 7 tourist information outlets: Town Hall Tower, Balice International Airport, 25 Szpitalna Street, 2 Św. Jana Street, 7 Św. Józefa Street, 16 Osiedle Słoneczne and Wyspiański Pavilion 2000 in Wszystkich Świętych Square. CIN forms an integrated tourist and cultural information system. Other outlets providing tourist information services include: Jordan Office, Promotion and Sales Office of the Salt Mine "Wieliczka", Tourist Information and Lodging Centre, Diocesan Information Centre and Małopolska Tourist Information Centre.





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KRAKOW TOURIST RESOURCES

Travel agencies

As in 2007, 382 travel agencies located in Krakow (agents or organizers of tourist events) were registered in the Central Record of Tourism Organizers and Agents at the Ministry of Economy and Labour. This number does not include tourist agencies involved in the sale of ready-made tourist events or single services.

From the viewpoint of tourism development in Krakow, the most important agencies are those dealing with incoming tourism. 22 agencies from Krakow are Members of the Incoming Tourism Forum functioning at the Polish Tourist Organization (Atana Travel, Delta Travel, Demel, Excalibur Tours, Express Travel, Grupa A-05, Haxel Adventure Tours, Intercrac Travel, Jan-Pol, Jordan, Krakus, Lumico, Marco der Pole, New World, Orbis Travel, Osti, Point Travel DMC, Start BTP, Top Travel Service, Tour Development Group, Wędrawiec, Visit.pl).

There are about 90 travel agencies among the members of the Krakow Tourism Chamber.

City guides

Krakow is one of the ten cities in Poland where only persons meeting the conditions defined in the tourist services law and its executive acts, i.e. persons who have completed a special course, passed an exam and received an appropriate certificate issued by the Marshal of the Małopolskie Province can work as tourist guides. The courses for city guides are organized by organizations such as the Educational Association of the Royal Castle in Krakow, Tourist Agency Gaja, Guide and Tourist Services Agency Renesans, Tourist Services Agency Palatium. Approx. 900 people possess the qualifications for being a tour guide in Krakow. The majority of them are grouped into several associations.

Individuals who are not citizens of Poland and have no permanent place of residence in Poland are issued licenses for the offering of tourist guide services by the provincial marshal of their choosing.

Citizens of member states of the European Union, Switzerland, and of the European Free Trade Agreement zone – signatories of the European Economic Area treaty, not having a permanent place of residence in Poland, who have obtained the qualifications for working as a tourist guide in those nations are issued licenses for the offering of tourist guide services by the provincial marshal of their choosing. The basis for issuing permits is the decision of the appropriate minister for tourism matters as regards the recognition of qualifications for working as a tourist guide in Poland.

In Kraków, tourists can see the city by horse-drawn carriage, electricity-powered golf carts, horse-drawn trams, historic electric trams, café car trams, historical buses, and also a modern two-storey bus following a fixed route. A new offer is the chance to sightsee using the futuristic Segway, and by bicycles available in several self-service locations.

The area of the city along the river can be travelled via ferries and water trams.

Other attractions include the John Paul II Papal Train from Kraków to Wadowice, equipped with a multimedia studio.

Krakow Tourist Card

A two- or three-day card entitles the holder to free travel on city transport (buses, trams), and to free admissions to 32 Krakow museums and their branches. The card holders also profit from discounts in selected restaurants and shops, as well as for local trips. The card can be purchased in tourist information outlets, various hotels, and travel agencies.

Quality of tourist services

The voluntary participation of the city guides in the annual “Guide of the Summer” Competition and of the restaurant-keepers in the Krakow Restaurants Recommendation Action organized by the Krakow Municipality proves that those entities do not fear having their services evaluated, and treat participation in the competitions also as an occasion for increasing the quality and promotion of those services.

The quality of tourist services in Krakow can be affected by departures of the staff to other EU countries, especially in the gastronomic sector. The reason is that the level of salaries in Krakow hotels and restaurants is very low in comparison to the average level of salaries in comparable positions in other European countries.

Restrictions on traffic in the city centre

A restricted-parking zone is in effect in the Kraków city centre. A total ban on vehicles runs from zone A encompassing the Market Square and neighbouring streets to

V. TOURIST ATTRIBUTES

Krakow has rich and diverse tourist attributes, which mainly comprise the city's historical heritage and cultural offer, but also natural and social attributes. Krakow tourist resources allow for the realization of all the tourism forms typical for city tourism, especially cultural and business ones (including conference tourism). Religious tourism is also an important aspect of visits. Moreover, the city is a destination for holiday (recreational) trips.

The importance of various tourism forms, e.g. educational tourism (including pursuit of personal interests), entertainment, active and therapeutic tourism, continues to increase.

Cultural assets

With regards to Poland, Krakow has the greatest amount of cultural assets of the highest historical and artistic value. They consist of:

- Wawel Hill with the Royal Castle and cathedral,
- 10 urban systems and complexes, including 5 cities of the past (Krakow, Kazimierz, Kleparz, Podgórze and Nowa Huta),
- 37 rural complexes – former villages – established mainly in the Middle Ages,
- 93 residential buildings and complexes,
- 95 sacral buildings and complexes (including a complex of 7 synagogues, unique on the European scale),
- 180 public utility buildings,





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KRAKOW TOURIST RESOURCES

- 4 mounds,
- 17 historical cemeteries,
- 24 parks and historical greenery areas,
- relics of defence systems dating from various epochs, including 184 military buildings related to the Austrian Fortress Krakow,
- 42 industrial buildings and complexes,
- 481 roadside shrines, statues, and crosses.

Interiors of buildings contain over 25 thousands works of art which constitute their decoration and furnishings, among which approximately 17 thousand are located in private collections and numerous museums.

The placement of the historical city centre on the first UNESCO World Heritage List in 1978 was a confirmation of the value of Krakow's historical heritage.

The authenticity of the historical urban architectural Krakow system, formed during its thousand-year-long history and constituting one of the leading artistic-cultural complexes in Europe, has resulted in its recognition as a monument of history. This monument occupies 678.34 ha (2.07% of the city area) and concentrates the oldest historical complexes and the most precious historical buildings, constituting 86% of the resources entered in the registry of historical monuments.

The most important among the 41 museums and their branches include:

- Royal Wawel Castle, most frequently visited by tourists.
- The National Museum in Krakow, established in 1879 (the oldest one in Poland) – which has one of the most important and most interesting collections in Europe, consisting of about 780 thousand exhibits including works of Polish, European and non-European art. Apart from the Main Building, the museum incorporates the following branches: the Princes Czartoryski Museum (with a Leonardo da Vinci painting "Lady with an Ermine"), Jan Matejko's House, Józef Mehoffer's House, Stanisław Wyspiański Museum in the Szolajski Tenement House, Emeryk Hutten-Czapski Museum, Bishop Erazm Ciołek Palace, and the Gallery of 19th Polish Century Art in Sukiennice.
- The Manggha Centre of Japanese Art and Technology, established in 1994, presenting collections of Japanese art and temporary expositions of Japanese art and technology.
- Historical Museum of the City Krakow (established in 1899), the first institution in Poland engaged in gathering the mementoes related to the political and economical history, as well as to art, traditions and ways of life of the citizens. It involved e.g. in the organization of the Krakow Crib Competition. The museum pursues its activity in 11 branches:
 - Krzysztofory Palace (mementoes of the history and culture of Krakow,
 - House under the Cross (mementoes of the history of theatre in Krakow),
 - Silesian House (exhibits related to the German invader's activity and the resistance movement in the area of southern Poland in the

years 1939-1945),

- Town Hall Tower (mementoes related to the city history, temporary exhibitions of contemporary Krakow painters),
- Celestat (exhibition from the "History of the Krakow's Marksmen Brotherhood"),
- Zwierzyniecki Artistic Salon (interior of a worker's apartment from the early 20th century),
- Old Synagogue (an exhibition dedicated to the history and culture of the Krakow Jews),
- Hipolit's Tenement House (exposition "Bourgeois House" – interiors from 17th - 19th centuries),
- Barbican – one of the most interesting examples of medieval defence architecture,
- Pharmacy Under the Eagle in the Ghetto Heroes Square (the former T. Pankiewicz's pharmacy houses an exhibition devoted to the tragic events of Holocaust in Krakow),
- History of Nowa Huta (Osiedle Słoneczne 16).

■ Jagiellonian University Museum in Collegium Maius – the oldest museum in Krakow (interiors and equipment of the oldest university building in Poland and other collections, one of the most valuable among them being collections of ancient scientific instruments).

Other museums operating in Krakow include: the Archaeological and Archdiocesan Museums, Museum of Independence, Armed Effort Museum, Seweryn Udziela Ethnographic Museum, Pharmacy Museum of the JU, Geological Museum of the Polish Academy of Sciences, Geological Museum of the Jagiellonian University, Home Army (AK) History Museum, Museum of History of Photography, Museum of Municipal Engineering, Cathedral Museum, Museum of Polish Aviation, Museum of Young Poland, Museum of Natural History of the PAS, Teatr Stary ("Old Theatre") Theatre Museum, Zoological Museum of the JU, Botanical Museum of the JU and Tadeusz Kantor Art Documentation Centre CRICOTEKA, Jana Matejko's Little Manor in Krzesławice, etc.

The main art galleries are the galleries of painting and graphics, to a lesser extent of sculpture, photography, and utilitarian art. In general, they present the Polish contemporary art, also that created by artists with Krakow origins. Apart from the exhibition activity, they are used for holding authors' meetings, lectures, seminars, and workshops.

The best known Krakow galleries include: Contemporary Art Gallery "Art Bunker", Poster Gallery, Gallery of the Polish Association of Visual Artists, Gallery of the Association of Polish Photographic Artists, Association of Friends of the Fine Arts - Iace of Art, Krakow Group Krzysztofory Gallery, Zderzak Gallery, Starmach Gallery, Rękawek Gallery, Andrzej Mleczko Gallery.

A dynamic exhibition activity is pursued by the International Cultural Centre, Centre of Jewish Culture, Galicia Museum, Nowa Huta Cultural Centre.

The highest number of galleries and other exhibition institutions are located in the Old Town area and in its direct proximity.

Recently, a considerable number of galleries have been established in the Kazimierz district. Proportionally few of them have found their places in the city's other districts and in the area of Podgórze and Nowa Huta.





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Cultural institutions

The most important cultural institutions operating in Krakow include:

- 12 theatres: H. Modrzejewska Sary Theatre, J. Słowacki, Ludowy and Bagatela Theatres, PWST (State Higher Theatre School) theatre, Groteska, STU, KTO, Łaźnia Nowa and Molier Theatres, Krakow Polytechnic's Zależny Theatre and the 38 Theatre,
- 5 musical institutions: Krakow Philharmonic (Krakow Philharmonics Brass Quintet, Philharmonia Quintet and Amar Corde string quartet), Krakow Opera (8-12 spectacles per month), Royal Capital Krakow City Orchestra "Sinfonietta Cracovia", Capella Cracoviensis Band (organizer of e.g. the International Festival "Music in the Old Krakow"), Krakow Chamber Opera (organizes e.g. the Summer Festival Ars Cameralis),
- 14 so-called "theatre groups",
- Centres of other national cultures: Italian, German, French, Jewish.

Community attributes

- John Paul II, Czesław Miłosz and Tadeusz Kantor were connected with Krakow and are associated with the city.
- 18 higher education establishments (with approx. 160 thousand students), including:
Jagiellonian University (approx. 500 titular professors) - the oldest university in the country, which educates over 41 thousand students, Academy of Fine Arts, State Higher Theatre School, University of Economics, Academy of Economics, AGH University of Science and Technology place Krakow among the leading academic centres in the Poland.

Consulate seats

- General: Austria, France, Slovakia, Germany, Russia, The United States of America, Ukraine and Hungary
- Honourable: Great Britain, Turkey, Norway, Japan, Lithuania, Italy, Peru, Mexico, Brazil, Denmark, Estonia and Sweden.

Conference Base

The largest and best-equipped conference halls are presently in the possession of Krakow's universities:

- University of Economics -a hall capable of holding 1500 people,
- Amphitheatre Hall for 1200 people in Auditorium Maximum of the Jagiellonian University,
- AGH University of Technology – Didactic Centre – a 650-person capacity hall
- Assembly hall for 400 people at the Jagiellonian University Campus,

Others include:

- Exposition hall of the “Targi w Krakowie” (Fairs in Krakow) company (max. seating capacity 1500),
- Conference halls accommodating hundreds of people can be found e.g. at the following hotels: Crown Piast Hotel & Park (300 seats), Sheraton (310 seats), Sympozjum (300 seats), Novotel Centrum (180 seats),
- Historical establishments, e.g. J. Słowacki Theatre (a hall for 489 people), also the Wawel Royal Castle (almost 280 seats),
- Halls are also provided by the Water Park (max. 500 seats) and Nowa Huta Cultural Centre (700 and 550 seats, respectively.).

Fair premises

In Krakow, there are in principle, two entities involved in organizing fair events based on their own infrastructure: Targi w Krakowie (Fairs in Krakow) Sp. z o.o. and Centrum Targowe (Fair Centre) Chemobudowa Kraków S.A.

- At present, the Fairs in Krakow Company possesses the largest modern exhibition hall in the city, with an area of 6 thousand sq.m., located on Centralna Street, in the transition zone between the city centre and Nowa Huta and in the proximity of important access roads. The building's construction enables even large cars and cranes to enter. The permanent calendar of fairs features e.g.: Book Fair (October), HORECA (November), Educational Fair (March), Fair of Antiquities and Contemporary Art (June), Spring Automotive Fair (April).
- The Chemobudowa Fair Centre is located in the Zabłocie district and possesses a modern, multifunctional, two-floor exhibition hall with the area of 2.7 thousand sq.m. and outdoor exhibition areas with an area of 3 thousand sq.m. The Centre specializes in building industry fairs (Krakow Building Fair - April and September), Furniture and Interior Furnishings Fair (October), as well as in the Autumn Fair for Gardening, Forestry and Zoology (May, October), Gas Industry Fair (March), Wedding Fair (March, November).
- For the organization of smaller fair events, the following sites are also used: Main Building of the National Museum, Cultural Centre Rotunda, TS Wisła hall, Agricultural Academy buildings, and PTG "Sokół" hall.

Entertainment centres

- Infrastructure existing based on gastronomic establishments, especially of the club type (Old Town and Kazimierz),
- Hotel casinos (Novotel Bronowice, Cracovia, Wyspiański),
- Children entertainments centres (Smykoland, Fantasy Park, Lalkowo, Anikino, Kids Play, Kulkoland),
- Discotheques and other entertainment centres (e.g. seven pool clubs, three bowling halls, 21 discotheques).

Cinemas

Cinemas have become a permanent feature of the Krakow cultural landscape. Taken together, they offer several dozen screens for screening movies displaying all techniques of world cinematography. The largest multi-hall cinemas function mainly outside the city centre - Multikino, Cinema City Plaza, Cinema City Galeria Kazimierz shopping mall, Cinema City Zakopianka.

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There are also smaller cinemas for aficionados of film, joining screenings with discussion clubs such as Mikro, Wrzos, Ars, Sfinks, Rotunda, Pod Baranami, Tęcza and Paradox.

Natural resources

In Krakow, the green areas occupy 4.5 thousand ha, which represents ca. 14% of the city area:

- 40 city parks with the area of 400 ha (excluding the monastery gardens and parks), including 14 historical ones. The oldest of them is the sixteenth century Decjusz Park (9.5 ha). The best known parks include: Planty (21 ha), Jordan's Park (21 ha), Krakow Park (5 ha), Shooting Park (1,5 ha) and Bednarski Park, established in a reclaimed quarry (8 ha).
- Blonia (a meadow with the area of ca. 48 ha) flat, not developed, located close to the city centre. It is used as a site for organizing outdoor events and meetings (the most famous were the Holy Masses celebrated by John Paul II).
- Forests occupy an area of 1421 ha (4,35% of the city area), perform natural protective functions, and play the role of recreational and rest areas. Most of them are located in the west part of Krakow, with the largest forest complex being the Wolski Forest (419 ha).
- Gardens – the Botanical Garden of the Jagiellonian University is an attractive green area (with the area of 9.6 ha), where plant cultivation areas (6 thousands plant species, including orchids - a rich collection of ca. 500 species and varieties) are accessible to visitors for sightseeing.
- Vistula Boulevards in the Vistula bend at the foot of Wawel – advantageously located and partially developed.
- The Zoological Garden occupies a 20 ha area. Its resources contain about 1500 animals (excluding invertebrates) of 286 species in, including 114 representatives of perishing species and species endangered with extinction. In 2004, the Garden was visited by 246 thousand people.
- The Stanisław Lem Garden of Experiences, located at the Polish Aviators' Park, is an exposition including 50 interactive didactic installations allowing for experiences that give users a chance to discover on their own the laws of nature.



In the Krakow area there are:

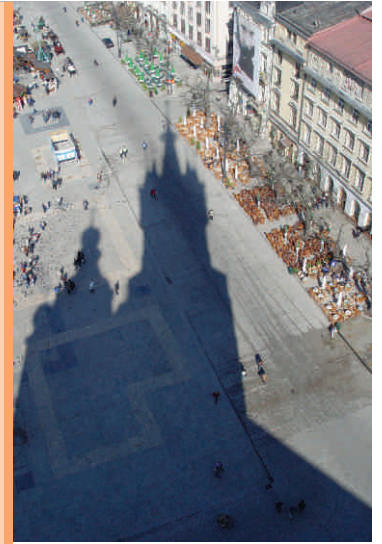
- Five natural reserves;
- Three landscape parks with the total area of 4753.8 ha (Bielańsko-Tyniecki Park, Tenczyński Park, Dolinki Krakowskie (Krakow Little Valleys). The neighbourhoods of Tyniec and Bielany are natural refuge areas of European importance. The rocky Jurassic areas have great health and recreational values;
- Natural monuments (including ca. 20 tree species, the total of 194 single trees, 1 lime tree avenue, "Świętojańskie Spring" in Tyniec and a granite erratic block "Rapa Kiwi");
- Two ecological arable lands ("Rząca Range" and „Nowa Huta Meadows");
- Artificial reservoirs (created as a result of flooding former mining sites with water after ending exploitation of solid minerals) include: Bagry, Płaszowski pond, Dąbie, reservoir on Zakrzówek, reservoir in Przylasek Rusiecki. The reservoir on Zakrzówek has the cleanest water (1st class). In the others, the water purity level stays within the limits of the 1st and 2nd purity classes;
- Therapeutic waters – in the Swoszowice (health resort) and Mateczny regions, there are two types of mineral waters which were acknowledged twelve years ago as therapeutic. At Swoszowice, these are sulphate-bicarbonate-calcium-magnesium- and sulphide waters, whereas at Mateczny - sulphate-chloride-magnesium-calcium- and sulphide waters. The waters are mainly useful in treating diseases of locomotive organs as well as rheumatic, gynaecological, skin and other diseases. Balneological procedures are carried out, especially baths, inhalations, gargles, and drinking therapies. A health-resort establishment within a large city is a phenomenon of a European scale;
- Approximately 60 km of bicycle paths (including Nowa Huta – Dłubnia route – fragment of the international Amber Route from Budapest via Krakow and Vistula Valley to the Baltic Sea);
- Two establishments important for tourist traffic, especially for children and youth, are the Water Park and the Sport and Recreation Centre ESCADA, meeting the sports, recreational and biological regeneration needs in a comprehensive way;
- Nine horse-riding centres;
- Golf and recreation complex in Paczółtowice (45 km from the centre of Krakow), including an 18-hole golf course, sports rifle-range, and equestrian club.

VI. TOURIST TRAFFIC CONCENTRATION

The tourist traffic in Krakow shows an excessive concentration in the city centre (in the Old Town and Kazimierz), while the potential of other city districts (Podgórze, Zabłocie and Nowa Huta) is poorly used.

The admission of Podgórze, Zabłocie and Nowa Huta into Municipal City Revitalization Program offers a chance to change this situation, and thus increase the city's appeal for tourists.

Podgórze (functioning as a separate city until 1918), like Kazimierz, has its own identity and interesting historic heritage. It includes e.g. St. Benedict's Fort, St. Benedict's church, St. Joseph's church, a former town hall building, an old cemetery, former inn buildings in Rynek Podgórski (Podgórze Market Square) and in Józefińska



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Street. The areas of Bednarski Park, the quarry, and the Krakus Mound constitute a recreational base. The most interesting tourist sites are connected by the "Podgórze Historic Route". The district is also happily visited by people of Jewish origins. For them, the most important sites are the ghetto areas from the times of World War II, including fragments of its original walls, the Nazi concentration camp in Plaszow, the Pharmacy under the Eagle and Oskar Schindler's historic factory on Lipowa Street.

Nowa Huta. Since 2004, the oldest part of Nowa Huta neighbouring Plac Centralny has been listed in the registry of historical monuments as a representative example of so-called "social realism" urban planning in Poland. The sites suggested for visiting include the so-called Nowa Huta Route, leading to places and buildings which present the architectural features of social realism, as well as those giving evidence of the rich culture and history of that area before the new city's placement there, and finally to places being symbols of the fight against communism (e.g. the Church of our Mother of God the Queen of Poland, called "The Ark of the Lord").

VII. ADVANTAGEOUS ECONOMIC CLIMATE

There is an advantageous economic and social climate for tourism development in Krakow, especially with respect to culture, science and to creating the image of Krakow as a business centre, the seat of important institutions and the place of residence of famous people.

Presently, Krakow is the site of important industrial, service, and infrastructural investments. This helps broaden the range of motives for tourist visits to the city and meet tourists' needs with respect to many complementary services.

The dynamics of tourism development in Krakow is demonstrated by the data presented below (based on GUS data), concerning the hotel and restaurant sector.

NUMBER OF ECONOMIC ENTITIES AS OF JUNE 30 FOR EACH YEAR

June 2003	June 2004	June 2005	June 2006	June 2007	June 2008
2946	3137	3354	3371	3388	3416



INCOME FROM SALES OF PRODUCTS AND SERVICES IN PLN mln
(DATA AS OF JUNE 30 FOR EACH YEAR)

	2003	2004	2005	2006	2007	2008
PLN mln	157	160	188	271	325	426

VIII. TOURIST TRAFFIC RESEARCH

For the last few years, tourist traffic research (both quantitative and qualitative), commissioned by the Municipality of Krakow, has been systematically carried out in Krakow. The research results are published yearly on the city's web page: www.krakow.pl

IX. ORGANIZATIONS SUPPORTING TOURISM DEVELOPMENT

Next to a large number of companies and multifarious public institutions participating in tourist traffic service, activity towards development of tourism in Krakow is also undertaken by associations, foundations, interest clubs, and tourist sector organizations.

Tourist sector organizations:

- Krakow Chamber of Tourism,
- Polish Tourism Society PTTK, Krakow Division,
- Polish Youth Hostel Association,
- Krakow Club of City Guides at the Krakow Division of PTTK,
- Małopolska Chamber of Hoteliers "Gremium",
- Małopolska Tourist Organization,
- Polish Hotel Association, Krakow Division,
- Diocesan Information, Promotion and Tourism Centre,
- "Krağ" Association – Community of Guides and Krakow Information Promoters,
- Krakow Guides Bureau JURA,
- Tourist Guides Association,
- Educational Association of Royal Wawel Castle

Organizations associating professional groups, including those serving tourist traffic:

- Krakow Merchant Congregation,
- Association of Main Market Square Gastronomers,
- Shooting Association Marksmen Brotherhood,
- Association of Friends of Fortifications, Krakow Division.

Organizations supporting local development:

- Association for Development of Nowa Huta,
- Podgorze.pl Association,





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- Friends of Podgze Association
- Łagiewniki Cultural Society,
- Artists' Association Kazimierz.com,
- Association of Admirers of the Royal City of Kazimierz.

LOCAL ACTS ON TOURISM

- 1. Krakow Development Strategy (resolution No LXXV/742/05 of the Krakow City Council of April 2005).**
- 2. Strategy of Tourism Development in Krakow for 2006-2013 (resolution No CXIV/1167/06 of the Krakow City Council of 5 July 2006 with amendments),**
- 3. Study of conditions and directions of spatial development for the City of Krakow.**



Photographs - UMK Archives:

W. Gorgolewski, S. Markowski, A. Żyrkowski,
W. Majka, K. Kodura, Port Lotniczy Balice

Design:

Bloo point/Horyzont

DTP:

Artur Brożonowicz