

Cruise ship tourism – a case study Poland

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Abstract

Cruise ship tourism is an important segment of the maritime tourism market. "Cruising, according to CLIA (Cruise Line International Association), is one of the safest, most affordable and enjoyable vacation experiences available today and the industry continually reviews best practices and develops innovative technologies to further strengthen its safety record. A record 20 million – plus global passengers went on a cruise in 2012" [1]. In addition, this branch of industry has also generated thousands of jobs at sea and in the ports of calls and has brought huge incomes for local economies in visited tourist destinations.

The main objective of this article is to assess the state of development of cruise ships tourism in Poland. In the first part of the article, there are included analysis of the number of cruise ship calls and passengers and there were also presented the largest cruise vessels that have visited seaports in Poland. There is also described the state of preparation of the seaports in Poland to support cruise ships. Moreover, there are also discussed the scope of services of the seaports in Poland, offered to ship-owners and a range of fees which must be borne by them. In addition, there are presented entities involved in handling of cruise ships while staying at the seaports. The article ends with a summary where it was indicated, inter alia, the reasons for the decreasing trend in the number of calls of cruise ships in Polish seaports.

Introduction

According to the World Tourism Organization, tourism "is defined as the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited" [2, p. 546]. Having regard to the recommendations of the WTO maritime tourism can be defined as: *staying at sea or ocean for the purposes of tourism or business, using maritime means of transport in the period not longer than 12 months. And in turn, maritime excursion is a tourist activity with using the means of water transport for the purposes of tourism or business that lasts no longer than 24 hours.* The proposed definitions of maritime tourism and maritime excursions include a few essential elements, i.e. the WTO recommendations and indicate the nature of a trip and most importantly – separate the maritime tourism from coastal tourism. [3, p. 110]. In the literature of the subject, there are a variety of

market segments, such as: yachting, ship cruise tourism, ferry travels, or cruises on aboard of a cargo ship and the others. However, cruises on cruise ships are considered to be the crown segment of the maritime tourism market. According to the definition of Cruise Europe "a cruise is a voyage of at least 60 hours by a seagoing vessel, mainly for pleasure. No cargo/rolling stock will be transported but only passengers with tickets that should include accommodation and all meals. The Cruise voyage must include at least two visiting ports apart from the starting and ending port" [4, p. 14].

"In the world, 30 thousands cruises ship travels are organized annually, to about 2 thousands tourist destinations" [5, p. 9]. More than 10,000,000 people take a cruise each year. About 80% will do it in North American waters. About half of all passengers on major world cruise lines begin their trips in one of three Florida ports: Miami, Port Canaveral and Fort Lauderdale [6]. The Caribbean Sea basin has been considered to be the world's most attractive cruise market thanks to the total share in the market at the level of 46% [7, p. 11]. While in

Europe, “the dominance of the Mediterranean Sea basin, which was apparent for all maritime passenger transport, (...) accounting for approximately two thirds (66.5%) of all cruise passengers in the EU (Fig. 1).

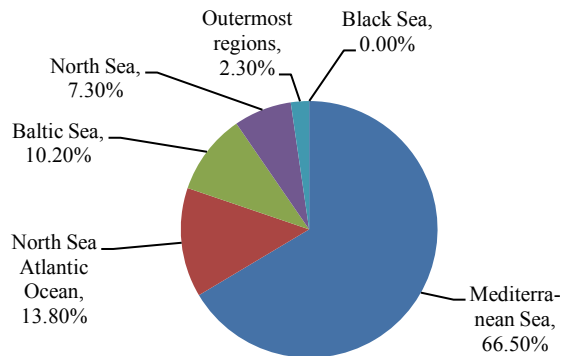


Fig. 1. The percentage of the sea regions in Europe in maritime tourism market [8]

The North-East Atlantic Ocean also had a large share of cruise passengers (13.8% compared with 11.8% for all maritime passengers), as did the outermost regions (2.3% compared with 1.6% for all maritime passengers). The share of the Baltic Sea was just 10.2% for cruise passengers, less than half its share of all maritime passengers” [9]. In addition, the European Commission reports that “more than 400 million passengers scroll each year by the European seaports” [10, p. 2].

The main objective of this article is to assess the state of development of cruise ships tourism in Poland. In addition, the following research problems were formulated: (1) What is the state of preparation of the seaports in Poland to support marine cruise ships in Poland? (2) What entities are involved in organizing of services for ship-owners in seaport cities in Poland? (3) What is a range of

services provided for the ship-owners of cruise vessels which visit tourist destinations in Poland? and (4) What fees are incurred in seaports in Poland by the ship-owners of cruise ships?

The survey was carried out in the period from January 2013 to July 2013. In the survey, there was used a combined method, i.e. a questionnaire and a standardized interview. The authorities of all strategic seaports, that are responsible for management of the development of seaports in Poland and additionally travel agencies that are involved in organization of staying of cruise ship passengers from cruise ships in tourist destinations areas, were actors of the survey. Moreover, the work uses the methods of critical and comparative analysis, the method of “desk research” and the study of literature in Polish and foreign languages and the relevant normative acts.

Poland on the cruise tourism market in Europe

According to Cruise Baltic Northern Europe, cruise tourism market is divided into three main segments, i.e.: (1) the large segment from 50 to 199 calls, (2) the medium segment from 25 to 49 calls, (3) the small segment from 0 to 24 calls. [4, pp. 11–13]. In accordance with that division, Polish seaports, such as the port of Gdynia, that has registered 69 calls of cruise ships in 2012, is included in the large segment, and the port of Gdańsk with the number of 29 calls – in the medium segment, but the ports of Szczecin–Świnoujście with the number of 6 calls – in the small segment.

Cruise ships call at so called marine tourist destinations, i.e. places with “a high level of port infrastructure to support visitation from large cruise ships, a high level of destination awareness among

Table 1. Technical parameters of quays rented to handle cruise ships in seaports in Poland (own study on the base of survey [8, 11, 12, 13])

A name of a port	Parameters of a quay					
	A name of a quay	Max draught at a quay	Max length of a quay	A number of berths for cruise ships	A maximum length of a cruise ship	A distance from the city centre in kilometers
The port of Gdańsk	WOC II Quay	8.5 m	600 m	2	170 m	8.5 km
	Wersteplatte Quay	9.3 m	1300 m	3	280 m	8.5 km
The port of Gdynia	French Quay	12.5 m ⁽¹⁾	512 m	2 ⁽²⁾	295 m	2.1 km
	Pomorianian Quay	7.4 m	626 m	2 ⁽³⁾	145 m	1 km
	United States Quay	8 m	796 m	3 ⁽⁴⁾	300 m	2.4 km
The port of Szczecin	Polish Quay	9.15 m	260 m	1	230 m	3.6 km
	Wały Chrobrego Quay	6.5 m	314 m	1	195 m	1.7 km
The port of Świnoujście	Władysław IV Quay	6.7 m	268 m	1	150 m	1.4 km

⁽¹⁾ Draught at pontoons = 12.5 m, at a quay max of 10.8 m; ⁽²⁾ there are 3 berths, including I = 300 m, II – 165 m, III – 20 m; ⁽³⁾ There are 5 berths with a length of from 20 m to 150 m, but only 2 of them have a length of 143 m and 150 m and can be used for handling of cruise ships; ⁽⁴⁾ There are 4 berths, including I = 225 m, II = 290 m, III = 67 m; IV = 214 m.

the cruise industry, a high degree of industry capacity and port infrastructure to support around visits, a high level of tourism destination infrastructure to support cruise ship visitation as: attractions, accommodation, activities, access and amenities” [14, p. 14]. In Poland, cruise ships are operated in four seaports of strategic importance to the country’s economy, i.e.: the port of Gdynia, the port of Gdańsk, the ports of Szczecin and Świnoujście (Table 1).

The port of Gdańsk has potentially got the best physio-geographical conditions to handle the world’s largest cruise ships. Unfortunately, deficiencies in the technical infrastructure dedicated to handle cruise ships cause that this port does not use the most of its opportunities. The cruise ships are mainly directed to the inner harbor – the Wersteplatte Quay, which may handle only cruise ships with the maximum length of 280 m and the maximum draught of 9.3 m. (Fig. 2) or to the WOC II Quay, which can support only units with max length of 170 m and the max draught of 8.5 m. (Fig. 3).



Fig. 2. The Wersteplatte Quay in the port of Gdańsk [15]



Fig. 3. The WOC II Quay in the port of Gdańsk [15]

The market leader in handling of cruise ships in Poland, there is the port of Gdynia. At the disposal of ship-owners, the Port of Gdynia Authority Joint Stock Company provides three quays i.e.: the French Quay, the Pomeranian Quay and the United States Quay. The biggest cruise ships are handled at the French Quay (fig. 4.), that is able to handle

cruise ships of max length of up to 295 m, and draught of 12,5 m. This is a historic berth, where in the 30-ies of the twentieth century, the greatest transatlantic cruise ships were handled, but unfortunately now it is situated in an industrial environment, that is not attractive for tourists. In addition, ships with a length of up to 300 m, with a maximum draught of 8 m, can moor at the United States Quay.



Fig. 4. AIDA Bella at the French Quay (Gdynia) [author’s photo]



Fig. 5. Ocean Majesty on the Pomeranian Quay (Gdynia) [author’s photo]

The most representative and most desired quay by the shipowners of cruise ships is the Pomeranian Quay (Fig. 5) which is located just in the heart of the City of Gdynia. This is the tourist centre of the city with full range of services and facilities, but unfortunately, due to the technical parameters, only cruise ships with a length of up to 145 m and draught of 7.4 m can be handled.

In recent years, it is observed the downward trend in the number of calls of cruise ships in the polish seaports (Figs 6 and 7). In 2009, Poland was visited by 139 cruise ships with a total number of 153,073 passengers. It was a record year in a number of calls of cruise ships till now. In 2012, there were handled only 104 units in Poland, representing a decrease of 25% compared to 2009, and only 121,118 passengers visited seaports in Poland, representing a decrease of more than 20% (Table 2).

Table 2. The number of passengers on cruise ships in seaports in Poland (own study on the base of [4, 8, 11, 12, 13])

A name of a port	The number of passengers of cruise ships in different years												
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
The Port of Gdynia	57,610	56,460	26,666	58,411	72,977	88,723	94,135	89,088	123,521	134,884	125,005	78,418	108,628
The Port of Gdańsk	3643	3486	3609	3367	7359	8353	9703	12193	13276	16753	8378	6787	8294
The Port of Szczecin	0	0	0	0	0	460	273	953	2035	1436	6178	1160	4196

Table 3. The number of cruise ships visiting seaports in Poland (own study on the base of [4, 8, 11, 12, 13])

A name of a port	The number of cruise ships in different years												
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
The Port of Gdynia	72	74	53	95	82	94	89	87	89	96	85	56	69
The Port of Gdańsk	14	17	14	7	28	32	29	39	36	40	26	21	29
The Port of Szczecin	0	0	0	0	0	1	1	3	5	3	12	3	6

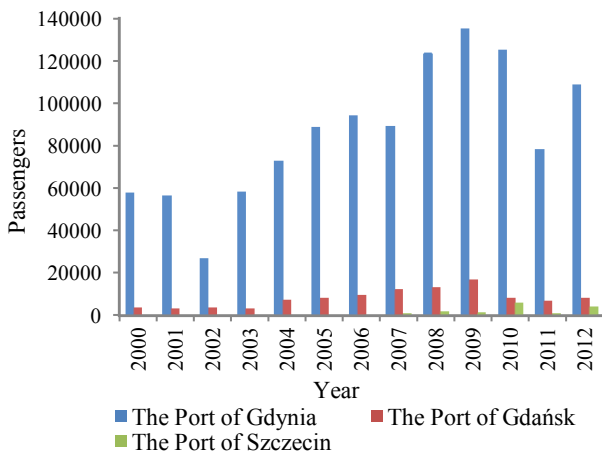


Fig. 6. The number of passengers of cruise vessels visiting seaports in Poland (own study on the base of [4, 8, 11, 12, 13])

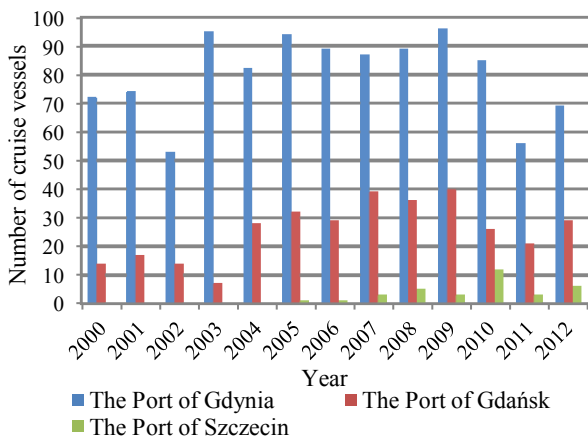


Fig. 7. The number of cruise ships visiting seaports in Poland (own study on the base of [4, 8, 11, 12, 13])

The Port of Gdynia is the leader in handling cruise ships on the Polish market. In 2009, there were 96 calls of cruise ships with 134,884 passengers on board, and in 2012 – only 69 calls and 108,628 passengers, what gives a decrease of 28% in the number of calling units and a decrease of 19% when it comes to the number of passengers, in comparison to 2009. The lowest number of calls of

cruise ships is recorded in the ports located in the western part of Polish seacoast, i.e. the ports of Szczecin and Świnoujście. In 2012, there were handled only 6 cruise ships (Table 3) with 4196 passengers on boards. However, the authorities of the West Pomerania Province appreciate the role and importance of development of the maritime tourism for their area. Therefore, as one of the strategic objectives of the development of marine economy, they indicate the development of maritime tourism i.e.: “promotion of the image of the West Pomerania Province as an area of maritime tourism and creation of conditions for handling of large cruise ships and tall ships in Szczecin and modernisation of port infrastructure” [16, p. 126].

The Polish seaports are mostly visited by cruise ships belonging to AIDA Cruises. Only in the years 2009–2012, there were 69 calls of AIDA’s cruise ships, in this AIDA Sol cruise ship were handled 23 times in Gdynia, AIDAblu – 26, and AIDAbella – 20. The AIDA Cruises is most recognized cruise brand in the German cruise industry. AIDA Cruises is a British-American owned German cruise line based in Rostock, in Germany. The company started its activities on the cruise tourism industry in the 1960s but in 2000, it was acquired by P&O Princess Cruises. While in 2003, P&O Princess merged with Carnival Corporation in order to create the Carnival Corporation & plc (the largest cruise holiday company all over the world). AIDA Cruises offers various tourist packages on board of nine cruise vessels: AIDAcara, AIDAvida, AIDAaura, AIDAdiva, AIDAbella, AIDA luna, AIDAblu, AIDA Sol and AIDamar. Passengers on the AIDA cruise ships, almost consist entirely of Germans and other German-speaking Europeans like Austrians and Swiss. AIDA ships have many on-board amenities and facilities that attract younger, more active tourists [17]. AIDA ships offer their guests a wide range of services and facilities. On board of AIDA

cruise ships, passengers have to their disposal: shopping centers, galleries, libraries, internet cafes, conference centre, medical care centre, beauty salons, swimming pools, saunas, fitness center, volleyball court, basketball court, squash courts, golf simulators, jogging path, and for children: Kids Club and Teens Club. In addition, on board, there is also a travel office that offers a variety of tour excursions for tourists, who want to arrange individually their stays. Next to AIDA Cruises, in the years 2009–2012, Polish seaports (mostly the Port of Gdynia) were visited by Empress cruise ship (36 calls) and Zenith (18 calls) belonging to the Pullmantur Cruises and also by Princess Daphne cruise ship, belonging to the Golden Laurel Maritime (17 calls).

Constellation cruise ship is the largest cruise ship, who visited seaports in Poland (Table 4) over the past five years. She belongs to the Celebrity Cruise Line and has the length of 294 m in, the width of 32.2 m, a capacity of 91,000 GT and draught of 8.3 m. This ship can take on board 2034 passengers and 999 of a crew. There are 11 passenger decks, where there is a wide range of facilities and services such as: Emporium gallery of shops, a cinema and conference center, “Celebrity Theater”, “Fortune’s casino”, Rendez – Vous Lounge, Night Club Reflections, Online @ Celebrity, Shipmates Fun Factory, The Conservatory, a library, Persian Garden, Aqua Spa® by Elemis, hairdresser, a solarium, Fitness Center, Seaside Pool, 4 Jacuzzis, sports ground and a jogging path.

It is needed to highlight, that currently in Poland only the Port of Gdynia has got organizational and technical conditions to support the largest cruise ships operating in the Baltic Sea, i.e. vessels with

a length of more than 295 m and a draught of up to 12 m.

The studies, that were carried out with seaports authorities in Poland, show that, unfortunately, handling of cruise ships is not a priority for development. The seaports in Poland derive major benefits from supporting of cargo ships and therefore, the investment activities are mainly targeted at this segment of the market. There are no plans for building of a dedicated terminal to handle cruise ships in Poland because the potential costs of these investments are too high to any revenues that could be gained eventually.

In Europe, the main cruise route leads through five major seaports on the Baltic Sea, i.e.: from Copenhagen to Tallinn, St. Petersburg, Helsinki to Stockholm. The ports in Gdynia and Gdańsk are located far away to the South from the main cruise route of the Baltic Sea. During the growth of prices of fuel, ship-owners consider the costs associated with extending of cruise routes in order to rebound from the main cruising route to the ports in the South of the Baltic Sea. It is obvious, that it is connected with an increase of the costs of fuel and it affects the operating costs. Mostly cruise itineraries begin or end in Copenhagen or Stockholm. These two ports are among the top five major ports handling cruise ships on the Baltic Sea. In 2012, the Port of Copenhagen handled until 372 units and 840 passengers, and the port in Stockholm – 274 and 470,000 passengers [4, pp. 1–9].

The negative trend, in decreasing of a number of calls of cruise ships in the Polish seaports, is caused by several main factors, i.e.:

- peripheral location of the Polish seaports in relation to the major cruise routes in the Baltic Sea;

Table 4. The biggest cruise ships visiting seaports in Poland in the years 2009–2013 (own study on the base of [8, 11, 12, 13])

A name of a cruise ship	A shipowner of a cruise ship	Flag	A capacity in GT	A length of a cruise ship	A draught of a cruise ship
Constellation	Celebrity Cruise Line	Malta	91,000	294.00 m	8.30 m
Queen Victoria	Cunard Line	Great Britain	89,500	294.00 m	7.90 m
MSC Poesia	MSC Cruises	Panama	93,330	293.80 m	7.70 m
Costa Mediterranea	Costa Crociere	Italy	85,619	292.50 m	8.00 m
Costa Pacifica	Costa Crociere	Italy	114,147	290.20 m	8.30 m
Star Princess	Princess Cruises	Bermuda	108,977	289.51 m	8.50 m
Grand Princess	Princess Cruises	Bermuda	108,977	289.50 m	8.52 m
Crown Princess	Princess Cruises	Bermuda	113,567	288.70 m	8.50 m
Emerald Princess	Princess Cruises	Bermuda	113,561	288.70 m	8.50 m
Arcadia	P & O Cruises	Bermuda	83,781	285.10 m	8.10 m
Costa Magica	Costa Crociere	Italy	102,587	272.19 m	8.20 m

- the low competitiveness of tourist packages in the tourist destinations areas in Poland in relation to other countries in the Baltic Sea region;
- insufficient promotion of tourist attractions of the coastal regions in Poland;
- the lack of passenger terminals dedicated to support of cruise ships in the seaports in Poland;
- insufficient image campaign on behalf of promotion of Poland as a maritime tourist destination.

Coastal regions in Poland have a huge tourist potential, thanks to their unique tourist attractions and a developed tourist infrastructure and supra-infrastructure. However, without an effective and coherent promotional and information campaign, which should promote the image of Poland as a maritime tourist destination, the ship-owners of cruise ships will still avoid visiting the Polish seaports. If the Polish seaports are hard-coded in the itineraries of cruise ships, it is necessary to work out the common platform for cooperation between all entities involved in supporting of cruise ships, i.e. above all, local authorities, port authorities, tourism industry and maritime economy. The aim of this cooperation, in addition to integrated actions for business, it should be improvement of the state of port infrastructure dedicated to cruise ships. The European Commission also stresses that “the dialogue is of a great importance, because it allows to ensure social acceptance and effectiveness, improves the image of ports, provides a better spatial organization of urban, recreation and tourist features” [18, p. 3].

Organization of handling of cruise ships in Poland

In the world, ports handling cruise ships are divided into two main groups, i.e. a base port and a port of call. According to F.M. Collison “*a base port is the point that a cruise ship uses as its home port of call. This is typically where passenger initial embarkation and final debarkation take place. The base port often is used for the provisioning of the ship, including fuel, food and beverages, and other consumable and non-consumable stores*” [19, p. 52]. The base ports are usually located in the areas with a concentration of a tourist demand, with unique tourist attractions, high standard of tourist amenities and with suitable communication accessibility. Among the most important base ports of the world must be mentioned as follows: in the USA - Miami, Port Everglades, Port of San Juan, but also San Francisco, Los Angeles, on Hawaii – Honolulu, in Argentina – Buenos Aires, in Chile –

Valparaiso, in the South Africa – Cape Town, in Australia – Sydney, in New Zealand – Auckland, in China – Beijing, in Thailand – Bangkok, in Singapore – Singapore, and in India – Bombay. Moreover, in Southern Europe, among the most important base ports are listed: in Spain – Barcelona, in Italy – Rome and Venice, in Greece – Athens, in Portugal – Lisbon, and also Grand Harbor in Maltese. In turn, in Northern Europe, the dominant role, as base ports are: in Great Britain – London, in the Netherlands – Amsterdam, in Denmark – Copenhagen and in Sweden – Stockholm.

While a port of call is an intermediate stop for a cruise vessel on its sailing itinerary. At these ports, the cruise lines call for a few to several hours in order to explore the tourist attractions. In Poland, cruise ships call at ports in: Gdynia, Gdańsk, Szczecin and Świnoujście.

The owners of cruise ships expect preparation and organization of a full range of services at the seaports which are ports of call or base ports, i.e.: pilotage, towage and moorage services, delivery of drinking water and catering, delivering energy, reception of waste water and rubbish from the ship, delivery of fuel for ships, safe stopping of a ship at berth (protection of land and water side) and organization of sightseeing tours for cruise ship passengers. These services are provided in all ports where cruise ships are handled. While, in the base ports, it is additionally developed the infrastructure of hotel services, catering and accompanying services for passengers waiting for embarkation or coming back from the cruise travel to their places of residence. It is also necessary to ensure an adequate communication accessibility to the seaport, both by air, rail and road, in order to be able to handle tens of thousands of tourists benefiting from cruises on cruise ships.

There are lots of various entities dealing with supporting of cruise ships calling to the seaports in Poland. Among the others, it is necessary to mention: port authorities, shipping agencies, tour operators, transport companies and the others (Table 7). The port authorities of the seaports make deals with ship-owners of cruise ships regarding the dates and terms of calling of cruise ships, not later than a year before calling, and sometimes even two years before. Then technical characteristics of a cruise ship i.e. its length, width, height and draught, as well as, the number of passengers on board are determined. At the same time, port authorities indicate a quay, where a cruise ship will be handled safely. Moreover, an obligation of seaport staff is to ensure a safe entry and exit of a cruise ship from the port, which is associated with offering of pilotage, towage and moorage services.

For all the services provided in a seaport for owners of cruise ships port charges are taken (Tables 5 and 6). In Poland, these issues have been regulated by law regulations in the act regarding ports and marine terminals [20]. There are distinguished the following port charges:

- 1) tonnage fee for entry of a seagoing ship to the port and departure of a ship from the port, transit through the port area, and assurance of ship waste reception for recycling or treatment per 1 GT;
- 2) wharfage fee for seagoing ships for use of a wharf or jetty, that may not be higher than 0.17 euros per unit of gross tonnage (GT) of the vessel;
- 3) passenger fee collected for passengers embarking and disembarking, which may not be higher than EUR 1.74 per 1 passenger. In addition, the act indicated, that port fees are dependent on the nature of these charges, types and size of a ship, time of use of the port infrastructure and also a type of passenger traffic [20].

Table 5. Port fees used in seaports in Poland (own study on the base of [15, 21, 22])

A name of a seaport	Types of port charges for owners of cruise ships	The height of the port fees
The Port of Gdansk Authority Joint Stock Company	Tonnage fee per 1 GT	0.13 euro
	Wharfage fee	0.04 euro
	Passenger fee	0.65 euro
The Port of Gdynia Authority Joint Stock Company	Tonnage fee per 1 GT	0.13 euro
	Wharfage fee	0.04 euro
	Passenger fee	0.90 euro
The Ports of Szczecin & Świnoujście Authorities Joint Stock Company	Tonnage fee per 1 GT	0.53 PLN*
	Wharfage fee	0.16 PLN*
	Passenger fee	4.00 PLN**

* Cruise ships with a gross tonnage above 50,000 GT are settled from the capacity 50,000 GT.

** Applies to passenger ships and other maritime vessels with a capacity of more than 1000 GT, because ferries and passenger-cargo ships have a price 3.25 PLN/pax.

Some seaports, to encourage shipowners to visit their ports, introduce a flexible pricing policy in the field of port charges and so for example the Port of Gdansk Authority Joint Stock Company prepared separate tonnage fees for cruise ships which are dependent on frequency of calls. If a cruise ship has 2–3 calls per a year, a port fee in Gdańsk amounts to 80%, but if 4–5 calls – 60%, if more then it amounts only 50%.

The analysis of fees used in the seaports in Poland indicates that their height is much lower,

than it is allowed in law regulations. According to J. Neider “port authorities must pay attention to the total amount of fees, what shall be borne by a shipowner at the port, and so not only on the amounts of tonnage and wharfage fees, but costs of necessary pilotage, towage and moorage services. In a case of vessels, which port authorities want to attract and maintain particularly e.g. passenger ships, they are willing to grant additional discounts or exempt from the obligation of hire of the full cast of tugs at the entrance to the port, so that the total costs regarding supporting of a ship was competitive to other ports” [23, pp. 113–114]. The owners of cruise ships leave on average from 11 to 20 thousand euros in seaports in Poland, while for example in Copenhagen, these costs are three times higher and come up to 60,000 Euro [8]. Due to that, it is possible to say that seaports in Poland are competitive on the Baltic Sea.

Next to port authorities, a number of services on behalf of shipowners of cruise ships is offered by shipping agencies. Some of them carry out pilotage, towage and moorage services but also they help in organization of an efficient service while customs and border procedures, but also ensure safety of a cruise ship in the port, arrival and departure assistance, organization of various / necessary inspections and surveys or assistance in emergency situations i.e. providing medical help. Moreover, they provide catering and other services and goods at ship-owners’ orders. Among the leaders there must be mentioned such companies as: Polsteam Shipping Agency Ltd., Gdynia Maritime Agency Ltd., “WUZ” Port and Maritime Services Ltd., Baltic Shipping Agency Ltd or Inchcape Shipping Services Poland Ltd. and the others.

The owners of cruise ships also cooperate with stakeholders of the tourism industry, who organise stays of cruise ship passengers in popular destinations. Cruise ships frequently stay in the seaports in Poland for the period from 8 to 12 hours. At that time passengers are picked up on organised trips to tourist destinations around the region. In Poland, tourist services for cruise ship passengers are provided by several tour operators, among them there are: Baltic Gateway Poland, “Sanus Travel” Andrzej Ossowski Sopot, *Mazurkas Travel Travel Office* Ltd. Warsaw, Fifi Travel Ltd. Gdańsk and Sport Tourist Ltd. Gdańsk (Table 7). In Poland, Baltic Gateway Poland (BGP) is the market leader in terms of tourist service of the cruise ship passengers and BGP represents the following shipowners: Peter Deilmann Reederei, Transocean Tours, Planturs & Partner oraz Costa Cruises. BGP has been servicing cruise vessels since 1995, organizing tourist land

Table 6. The fees for pilotage, towage and moorage services in seaports in Poland (own study on the base of [8, 12, 13, 15, 21, 22])

A name of a seaport	The types of fees	The capacity of a ship GT	The height of the port fees charged in euros
The Port of Gdansk Authority Joint Stock Company	Fees for pilotage services	do 2000	130
		10,001 – 11,000	340
		20,001 – 22,000	580
		100,001 – 110,000	1910
		251,001 – 300,000	2460
	Fees for towage services due to capacity of a ship	do 2000	135
		10,001 – 11,000	535
		20,001 – 22,000	850
		100,001 – 110,000	2680
		251,001 – 300,000	3780
	Fees for moorage services	do 2000	35
		10,001 – 11,000	127.5
		20,001 – 22,000	270
		100,001 – 110,000	1190
		251,001 – 300,000	1760
The Port of Gdynia Authority Joint Stock Company	Fees for pilotage services	do 2000	470
		10,001 – 11,000	1265
		20,001 – 22,000	2145
		100,001 – 110,000	7075
		251,001 – 300,000	9010
	Fees for towage services due to capacity of a ship	do 2000	132
		10,001 – 11,000	528
		20,001 – 22,000	842
		100,001 – 110,000	2640
		251,001 – 300,000	3729
	Fees for moorage services	do 2000	32
		10,001 – 11,000	126
		20,001 – 22,000	268
		100,001 – 110,000	1181
		251,001 – 300,000	1764
The Ports of Szczecin & Świnoujście Authorities Joint Stock Company	Fees for pilotage services A	do 2000	100 euro + 0.24 euro for every started 10 m ³
		20,001 – 75,000	580 euro + 0.17 euro for every started 10 m ³ excess over 20 000 m ³
		75,001 – 150,000	1515 euro + 0.10 euro for every started 10 m ³ excess over 75 000 m ³
	Fees for pilotage services B	do 2000	300 euro + 0.48 euro for every started 10 m ³
		20,001 – 75,000	1260 euro + 0.34 euro for every started 10 m ³ excess over 20 000 m ³
		75,001 – 150,000	3180 euro + 0.20 euro for every started 10 m ³ excess over 75 000 m ³
	Fees for towage services due to capacity of a ship	do 2000	120
		10,001 – 11,000	480
		20,001 – 22,000	765
		100,001 – 110,000	2400
		251,001 – 300,000	3300
	Fees for moorage services	do 2000	To be agreed with the company providing the service. The amounts of the fees are not published.
		10,001 – 11,000	
		20,001 – 22,000	
		100,001 – 110,000	
251,001 – 300,000			

programs for international cruise companies with an average of 80 calls per year. They are able to provide various types of active, special or overland tours for individuals and small groups from cruise vessels.

In addition, local authorities, in the coastal tourist regions in Poland, are interested in generating of the economic benefits thanks to the flow of cruise ship passengers and encouraging them to use the services of local tourist economy. Therefore, in

Table 7. The scope of services offered to ship-owners in Poland [own study]

A type of an entity	A name of an entity	The scope of services provided
Port authorities	The Port of Gdansk Authority JSC The Port of Gdynia Authority JSC The Ports of Szczecin & Świnoujście Authorities JSC	Ensurance of the safe entry and exit of the vessel to/from the port; Designation of a berth for mooring of a vessel; Help in towage, pilotage and moorage of a ship; Collection of port charges: Delivering of drinking water, energy and reception of waste water and rubbish.
Tour operators	Baltic Gateway Poland Gdynia	Organization of various tourist packages for groups and individuals at tourist destinations; Local excursions, Comfortable buses, vans and cars; Qualified multilingual guides; Ships agency services in all ports and cruise destinations in Poland: (Ships Clearance; Pilotage Planning and cost estimates of different variations of inner lead / outer lead pilotage; Crew transfer arrangements & Medical follow-up and assistance for passengers and crew).
	“Sanus Travel” Andrzej Ossowski Sopot	Local excursions (Gdańsk, Malbork Castle, Cashubian lakes); Comfortable buses, vans and cars; Qualified multilingual guides; Hotel reservations.
	Mazurkas Travel Biuro Podróży Ltd. Warsaw	Excursions; Regular sightseeings and day tours as well as arrangements for evening entertainment; Restaurant reservations; Tailor-made programs; Private guide-assistance or any other services in response to clients request; English-speaking tour escort assistance; Obligatory local guides; Private air-conditioned motor coach/minibus/car (depending on the group size).
	Sport Tourist Ltd. Gdańsk	Local group and individual excursions; Obligatory local guides; Transport by buses.
	Fifi Tavel, Travel Agency Gdańsk	Various tourist packages for groups and individuals in the Tri-city and in the region.
Shipping agencies	Port Company “SIEĆ” Ltd.	A 24-hour reception of wastewater with vessels and ferries.
	SHIP – SERVICE S.A.	Marine fuels fully compliant with international standard.
	Marbalco Shipping Co. Ltd.	Baltic Deep-sea Pilotage; Forwarding and inland haulage.
	Polsteam Shipping Agency Ltd.	Full agency service in all Polish ports for all types of vessels; Chartering; Bunkering, managing the most representative quay in Szczecin – Wały Chrobrego Quay.
	Baltic Shipping Agency Ltd,	Port Agency and vessel attendance in all Polish seaports; Chartering; Forwarding; Professional attendance of the vessel (24 hrs per 7 days).
	Maritime Gdynia Agency Ltd.	Customs clearance; Arrival and departure assistance; Port operations supervision; Organization of various / necessary inspections and surveys; Keeping records of the ships; Assistance in emergency situations i.e. providing medical help.
	Maritime Services Enterprise “Gdansk-Pilot” Ltd	Gdańsk Harbour Pilotage Services.
	“WUZ” Port and Maritime Services Ltd.	Port, offshore and deep sea towage; A full range of tugs to suit every purpose; Work boats small passenger vessels.
	Zakład Usług Żeglugowych Sp. z o.o. & Co. Sp.k. Szczecin	Harbour towage in the ports of Szczecin, Świnoujście and Police, Offshore and deep sea towage, Salvage and rescue operations.
	WULKAN. Sp. z o.o. Szczecin	Harbour towage in the ports of Szczecin, Świnoujście and Police, Offshore and deep sea towage.
	Fairplay Polska Spółka z o.o. & Co. Sp. k. Świnoujście	Deep-Sea Towage, Off-Shore Support and Salvage Works.
	Inchcape Shipping Services Poland Sp z o.o	Freightage; Consulting services in the scope of maritime transport.
Transport companies	Taxi corporations, Bus carriers, The owners of shuttle buses	Organization of transportation of tourists and the crew coming from cruise ships to attractive tourist destinations.

cooperation with local actors, they prepare interesting tourism products addressed to cruise ship passengers. For example, Agency for Gdynia Development Ltd. prepared such products as: Culinary Trail of Gdynia Center, Gdynia Modernism Route and the Maritime Legend of the City of Gdynia, and in turn, Gdansk Tourism Organization, in cooperation with local tourist companies, organized special offers for cruise ship passengers e.g.: Explo-

ration of the Historical Reconstruction in Pruszcz Gdański, “In the Footsteps of Solidarity”, “In Pursuit of the Amber – City game”, “In the Land of Amber”, City Tour Gdańsk (English, German, Italian, Spanish, French, Russian), and e.g. An interactive exhibition in the center of Hewelianum in Gdańsk “Energy, Sky and Sun” etc. Tourists arriving to Tri-City Agglomeration (Gdańsk, Sopot, Gdynia) have possibilities to choose a few of the

flagship products of the Pomeranian region, such as: a guided sightseeing of Gdańsk – a city with 1000-year's tradition, the medieval castle of the Teutonic Knights in Malbork, Hel Peninsula, Szymbark and Wdzydze Kiszewskie or e.g. golf courses in Postołowo. While, tourists visiting the ports of Świnoujście and Szczecin mostly visit the old town in Szczecin, but first of all, the Pomeranian Dukes' Castle, National Museum in Szczecin, Wały Chrobrego, or the Basilica of St. Jacob, and often go shopping to Berlin which is located about a 1.5-hour drive by bus, what unfortunately is wrong evaluated by tourist industry in Poland.

The analysis, that were carried out, show that tour operators offer a wide range of tourist products, but unfortunately, ship-owners decide, which of them will be offered in packages to cruise ship passengers. It is worth to point out that, a determining criterion is an economic aspect. The ship-owners usually impose high margins to prices of tourist packages that were prepared by tour operators and these are sources of high incomes for them. Therefore, ship-owners are not interested in cooperation with travel agencies that come out with proposals addressed directly to individual customers. Lately, it is observed a trend that cruise ship passengers organize individually, via the Internet, their stays in the places of ship calls and do not buy sightseeing tours offered by ship-owners. Soon, the owners of cruise ships will have to get used to this situation in order to meet the customers' needs.

Conclusions

“Many countries are aware of potential, what lies in the marine environment, therefore, they develop policies to stimulate activities in these areas” [24, pp. 1140–1144]. Some of them prepare even sectoral strategies for development of maritime tourism, as it is for example in Australia. While in Poland, the issues concerning the development of maritime tourism sector are considered marginally and included in various strategic documents in a partial way, i.e.: Strategy for Seaports Development until 2015, Strategy for Transport Development until 2020 (with a view to 2030), or Directions for Tourism Development until 2015. The lack of coordination of activities and a weak lobby in favor of maritime tourism development is the cause of deteriorating situation of this segment of the market.

However, in recent years in Poland, there is a noticeable increase in interest regarding the development of maritime tourism market, and in particular, a segment of cruise ship tourism. It is

evidenced by the fact that local authorities and seaports authorities participate in organizations aimed at promoting and development of cruise ship tourism, such as: Cruise Europe, Cruise Baltic, or Enjoy the Baltic. Moreover, the representatives of local authorities and seaports have regularly participated in the famous fairs of maritime tourism i.e.: Cruise Shipping Miami in the United States of America or Seatrade Europe Hamburg in Germany, in order to create the image of Polish cities in the coastal regions as unique maritime tourist destinations. These and other activities give hope that the negative downward trend in the number of calls of cruise ships in seaports in Poland will be changed.

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