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Baleanu, V and Irimie, S and Ionica, Andreea

University of Petrosani

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ABOUT THE ROMANIAN TOURISM POTENTIAL: THE NATURAL STRENGTHS OF THE MAIN TOURIST DESTINATIONS

BĂLEANU VIRGINIA*
IRIMIE SABINA **
IONICĂ ANDREEA ***

ABSTRACT

The tourism industry plays a more and more important role in the world economy, and is generally acknowledged to represent a significant source of economic growth for the European Union (EU), as well as for our country. In order to highlight the Romanian tourism potential and the necessity to turn this potential into actual sources of income for the national economy this paper presents a few aspects of the evolution's tourism in Europe and Romania, also some particularities of the main Romanian tourist destinations. The paper aims to reveal those "natural strengths" that provide the basis for both diversification and differentiation the Romanian tourism offer so as to satisfy the various requirements of the tourists and to compete successfully in the different segments of the international tourism market.

Keywords: inbound tourism; outbound tourism; domestic tourism; tourists accommodation capacity; tourist destination

1. INTRODUCTION

Romania can be situated between the most attractive tourist destination in Europe, due to the variety of its tourism potential, including: accessible relief forms combined harmoniously; very diversified flora and fauna; favorable climate for practicing tourism during all the year; significant base of natural resources of cure and treatment; inestimable cultural – historical and architectural patrimony. These characteristics of the national potential provide the basis for elaborating and applying both diversification and differentiation strategies related to the offer and the possibilities to penetrate almost all the segments of the tourism market.

The most important tourism areas with a great attraction of the natural landscape are the seaside of Black Sea, the Danube Delta (south-east), the Carpathian Mountains (covering almost 35% of the country area) and the hills and planes areas that have rich balneal resources. Also, on whole territory of Romania, there can be found tourism areas with very cultural – historical value as Moldova, Bucovina (north-east), Transylvania (center), Banat, Crishana (west and north-west), Muntenia (south) and Oltenia (south-west). In fact, this delimitation reflects the traditional vision over the tourism areas in Romania.

During the last period, the necessity to be aligned to the EU norms and ruled, including in the field of statistics regarding the Romanian tourism led to an alternative that delimits six main tourist destinations as: *seaside, Danube Delta, mountain resorts, spas, Bucharest and county residence towns, and other localities and tourism routes*. It can be noticed that, in principle, it appears also two major categories of destinations: one with dominant natural potential (the first four, same with the traditional tourism areas), respective one with dominant cultural-historical potential (the last two, through which it is regrouped in a different way the localities included traditional within the cultural-historical tourism areas).

After a succinct description of the general status of the international and domestic tourism in Europe and Romania the paper attempts to focus attention on the four above-mentioned tourist destinations with dominant natural potential. So, firstly it is presented the comparative evolution of the main indices used in the tourism statistics related to inbound tourism, outbound tourism and domestic tourism. Then, it is pointed out the structure of existing tourists accommodation capacity in Romania, also the usual indices for its utilization by the six main tourist destinations, and finally are exposed some particularities of those destinations that reveal the Romanian tourism' natural strengths.

2. THE GENERAL STATUS OF THE INTERNATIONAL AND DOMESTIC TOURISM IN EUROPE AND ROMANIA

The dynamics of the two major components of the international tourism (inbound and outbound tourism, expressed by the arrivals of foreign visitors and departures of resident visitors abroad) shows some different evolutions for Romania comparative with Europe (see table 1).

So, if the inbound and outbound tourism in Europe have a general increasingly trend before 2000 and after 2001, the arrivals of foreign visitors in Romania continuously dropped during 1990-2002 period, and then significantly increased in 2003 and 2004. As regards the departures of the Romanian visitors abroad, there is a more fluctuant evolution: a significant dropping between 1990 and 1995, followed by a rising in 2000, stagnation in 2001, a decreasing in 2002, then a consecutive increasing in 2003 and 2004.

On the other hand, it is important to notice here one specific aspect for Romania: one year before the considered period, in 1989, were recording only 0,9 millions Romanian visitors abroad and 4,9 millions foreign visitors, so that the numbers of the departures and arrivals in 1990 may be considered a record

performance. But it must remember that in 1989 Romania had been isolating within the former communist bloc for many years. Thus, both for residents and nonresidents, there was a true travel motivation at that time and also the possibility to satisfy this motivation by the opening of the frontiers.

Table 1 International tourism's evolution in Europe and Romania (inbound&outbound tourism)

(Millions persons)

	1990	1995	2000	2001	2002	2003	2004
Europe* : •arrivals (inbound)	264.8	309.3	384.1	383.8	394.0	396.6	416.4
•departures (outbound)	252.5	307.2	389.5	390.4	401.6	406.7	431.3
Romania** :•arrivals (inbound)	6.5	5.4	5.3	4.9	4.8	5.6	6.6
•departures (outbound)	11.3	5.7	6.4	6.4	5.8	6.5	7.0

*Source: WTO, Tourism Highlights, 2005 Edition

**Source: National Institute of Statistics, Yearbooks, International Romania's Tourism in 2004

An other relevant aspect of the general tourism status deals with the domestic vs. inbound tourism observation, which mainly consists in comparing the residents and nonresidents' overnights in the establishments of tourists reception with functions of tourists accommodation. Table 2 shows this sort of comparative data for the domestic and inbound tourism in E.U. and Romania.

Table 2. Domestic vs. inbound tourism in E.U and Romania

(Millions overnights)

	1995	1996	1997	1998	1999	2000	2001	2002	2003
Domestic tourism (d):	608.0	642.5	631.8	640.1	777.4	767.5	752.1	738.6	713.7
- E.U. (25)*	21.7	19.6	17.1	16.1	15.1	15.5	15.7	14.7	15.2
- Romania**									
Inbound tourism (i):	523.6	530.1	553.1	570.9	623.0	640.4	597.9	578.1	516.5
- E.U. (25)*	2.4	2.3	2.6	2.2	2.0	2.1	2.4	2.5	2.8
- Romania**									
Ratio (d/i):									
- E.U. (25)	1.2	1.2	1.1	1.1	1.2	1.2	1.3	1.3	1.4
- Romania	9.0	8.5	6.6	7.3	7.6	7.4	6.5	5.9	5.4

*Source: Eurostat yearbook 2004 (www.europa.eu.int/comm/eurostat)

**Source: National Institute of Statistics, Yearbooks, Overnights in the establishments of tourist reception with functions of tourist accommodation

This comparison allow us to find almost oppositional tendencies between E.U and Romania: if overnights related to domestic tourism in E.U. fluctuate before 1999, then continuously decrease, in Romania appears exactly the reverse situation. Also, the overnights related to inbound tourism in Romania fluctuate between 1995 and 1999, but continuously increase after 1999, while they continuously increase before 2000, and decrease after this moment, in E.U. Obviously, the calculated ratios

(domestic/inbound tourism in E.U and in Romania), reflect a similar oppositional tendency, but also an inferior position of Romania as inbound tourist destination: if each annual ratio shows that in E.U. are under 2 resident visitors to one foreign visitor, in Romania the minimum annual ratio shows over 5 resident visitors to one foreign visitor.

Because the above discussed issues referring to Romanian Tourism finally appear as a resultant of the tourists accommodation activities realized within the various establishments of tourists reception, the next section presents some of the aspects related to the tourists accommodation capacity in Romania.

3.THE TOURISTS ACCOMMODATION CAPACITY IN ROMANIA

In order to assess the tourists accommodation capacity in Romania, we present its evolution since 1990 (year of reference 1989) and/or recent situation of several indices of this capacity.

So, the evolutions of the volume indices related to the establishments of tourists reception with functions of tourists accommodation, the existing tourist accommodation capacity and the tourists accommodation capacity in function are represented in figure 1. It may remark a relatively different evolution between the number of establishments, on the one hand, and the number of bed places (existing tourists accommodation capacity) and the number of bed places-days (tourists accommodation capacity in function), on the other hand.

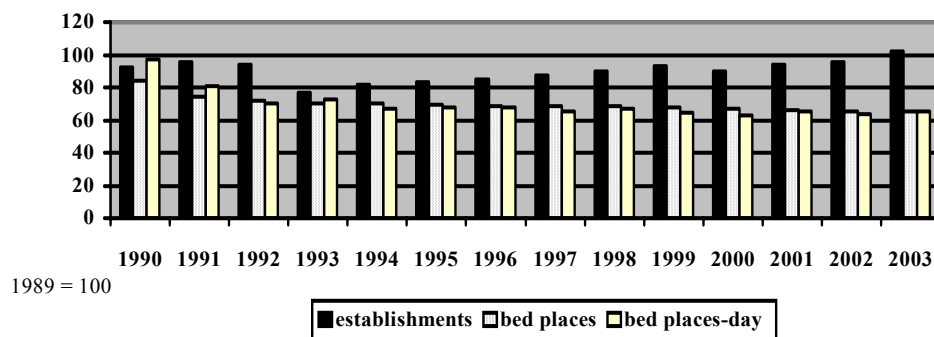


Figure 1. The evolution of the tourists accommodation capacity in Romania since 1990

That is, the number of establishments of tourists reception with functions of tourists accommodation fluctuates under the 1989' level during the considered period, but oversteps this level in the last year (2003). In return, the other two indices tend to slowly go down alongside between 1990 and 1999 (under their 1989' levels) and reach a plateau at about 60% of the 1989' levels during the last interval of the period (2000-2003).

There is a probable relation between the mentioned rising of the number of establishments (from 3490 in 1989 to 3569 in 2003), and the privatization process of the Romanian tourist sector, which have intensified just in the last few years. Thus, in the total of 3900 establishments of tourist reception with functions of tourist

accommodation existing in 2004, it was recording 3170 with private majority ownership (81.3%) and 730 (18.7%) with state majority ownership (see table 3).

Table 3. Tourists accommodation capacity, by type of ownership and type of establishments

Establishments	Total, of wich:		State majority		Private majority	
	Number	%	Number	%	Number	%
Total, of which:	3900	100	730	18.7	3170	81.3
Hotels	928	23.8	209	5.3	719	18.4
Rural tourist boarding houses*	892	22.9	6	0.2	886	22.7
Tourist villas	691	17.7	208	5.3	483	12.4
Urban tourist boarding houses	461	11.8	8	0.2	453	11.6
Bungalows	279	7.2	66	1.7	213	5.5
School camps	157	4.0	151	3.9	6	0.2
Motels	149	3.8	18	0.5	131	3.3
Tourist chalets	132	3.4	25	0.6	107	2.7
Campings	72	1.8	12	0.3	60	1.5
Houselet-type units	53	1.4	8	0.2	45	1.2
Tourist halting places	25	0.6	4	0.1	21	0.5
Hostels	21	0.5	3	0.1	18	0.5
Tourist inns	15	0.4	5	0.1	10	0.3
Ship accommodation spaces	13	0.3	4	0.1	9	0.2
Hotels for youth	10	0.3	3	0.1	7	0.2
Holiday villages	2	0.1	-	-	2	0.1

* Including the agro-tourist boarding houses

Distribution by type of establishments and type of ownership indicates that in only one of the 16 types of establishments (namely school camps) the state majority ownership is clearly dominant (96.2%), while another is entire with private majority ownership (the two holiday villages). All the others are with private majority ownership, in percents varying between a minimum of 66.7% (in the case of the tourist inns) and a maximum of 99.3% (in the case of rural tourist boarding houses).

The tourists accommodation activity's of any establishment, either private or state majority ownership, is measured by the net use of bed places indices (NUBPI) of the tourists accommodation capacity in function. In Romania, the average NUBPI decreased from 57.8% in 1990 to 34.6% in 2003, so that since 1997 the NUBPI values are under the international average values, which vary between 40% and 60%. However, there is some different situation of the NUBPI values' distribution by main Romanian tourist destinations, which we discuss together with theirs particularities in the following.

4. THE PARTICULARITIES: NATURAL STRENGTHS OF THE MAIN ROMANIAN TOURIST DESTINATIONS

The distribution of the tourists accommodation capacity and inbound vs. domestic tourism' indices (including NUBPI) by the six main tourist destinations in 2004 is presented in table 4.

Table 4. Distribution of tourists accommodation capacity and inbound vs. domestic tourism' indices by the six main tourist destinations in 2004

	Seaside	Spas	M.R.*	D.D.*	B&RT*	O.L.*
Number of establishments [% of total]	21.8	9.3	21.9	3.1	16.5	27.4
Existing tourists accommodation capacity (bed places) [% of total]	42.4	14.8	11.8	1.2	16.9	12.9
Tourists accommodation capacity (bed places-days) [% of total]	19.2	21.2	16.9	0.8	27.7	14.2
NUBPI [%]	41.8	48.6	22.6	28.3	32.9	19.5
Foreign tourists arrivals [% of total]	6.1	3.3	8.5	1.2	71.3	9.5
Foreign tourists overnights [% of total]	17.8	5.5	8.1	0.9	60.1	7.6
Romanian tourists arrivals [% of total]	15.7	14.9	16.8	1.3	38.7	12.6
Romanian tourists overnights [% of total]	24.7	35.4	11.8	0.7	19.2	8.2

*M.R. – Mountain resorts; D.D. – Danube Delta; B&RT – Bucharest and county residence towns; O.L. – Other localities and tourism routes

The foreign tourists arrivals and overnights, also the Romanian tourists arrivals, by tourist destinations in 2004 reveal that the first destination is Bucharest and county residence towns, but in regard to the resident tourists overnights the spas and the seaside surpass this destination. So, the situation seems to suggest a predominant motivation for urban tourism and business travels, and may be explained by the actual concentration of the developing business organizations around these towns. However, the different distribution of the Romanian tourists overnights deals with holiday motivation and their typical preferences for the two traditional destinations just because the particularities that we attempt to point-out in the next.

Among the general factors of influence of the tourism on the Romanian seaside can be mentioned:

- The complementarities with economical activities from other industries as the waterside ones (Constanta and Mangalia), industrial ones (Navodari), commercial ones etc.;

- *The fragility of surrounding environment in comparison with other tourist areas, due mainly to erosion of the soil (for example an average retraction of the cliffs is estimated at almost a half of meter every year, this process being intermittent);*
- The complementarities with balneal tourism activities, as a consequence of the presence of some natural factors for maintaining of the health, treatment and prevention of different affection (from the 11 resorts on the Romanian seaside, 5 are for the restoration and balneal treatment);
- The seasonality due to the strict dependence of climatic conditions.

The particularities of the Romanian seaside that can make a natural differentiation of the offer on this tourism market segment, are the sea water, the beach, the sea bio-climate, the balneal resources and the specific of the flora and fauna. *The sea water*, with its chemical composition, its reduced salinity comparative to the one of other seas, the thermal contrast with the air, the wave action, the presence of the aerosols resulted from braking the water waves constitute an important factor of cure in specific forms, as sea baths and wave-therapy. Another important feature constitute the lack of some dangerous insects and animals into the sea water (in Black Sea it exists a species of shark called “sea dog”, which is harmless for the people and it never come near the beach, but which is included as a delicates into the restaurants menus. So, the seawater creates a good frame for being practices the water sports and scuba diving. *The beach* is different from the offer of other countries in a series of aspects as: the orientation to the east and south-east that facilitates a long exposure to the sun (almost 10 hours every day); the climbing down into the sea with a line slope; a relative great width (of 400-500 m from Mamaia to 50-200 m in rest); the sand quality (type, purity, granulation, drying grade). As a result, there are special conditions for a heliotherapy; from this point of view the Romanian beach has not many rivals in Europe (the south costs of Italy and the Bulgarian ones). The sea bio-climate is characterized by the air purity and modest temperatures, by thermal stability and a reduced regime of rain (as average 140 sunny days in a year), which are benefit over the human body. Also, the lack of tide makes that the swimming to be practiced in safety conditions better than in other places of the world and that the beaches to be used in their whole capacity. The *balneal resources* as the mineral waters and therapeutic mud assure the elements necessary for a complex treatment (prophylactic, therapeutic and recovering treatment). Finally, the attraction of the tourism offer of the Romanian seaside is increased by the neighborhoods of some tourists interest as the natural reservations (eg. Dune reservations from Agigea, Hagieni Forest, the cave from Limanu), the historical places and archeological sites (the ruins of the most older towns in Romania: Histria, Callatis, Tomis). The Dobrogea places in which is framed this shore of Black Sea offer also other motivations adequate to the segment of thematic tourism (plants and animals specific to the region; rupestral caves and pictures; tasting the wines from the Murfatlar wine yard; a unique combination of cultural-ethnic elements, folkloric and traditional-food ones in which are combined the Romanian traditions with the Turkey, Greek and Tatar ones that had been come on these places). As a conclusion, even only these few particularities of the Romanian seaside of the Black Sea prove its special potential for tourism, supporting the development of attractive offers and also

differentiate ones, on many segment of tourism with dynamical evolutions on the international market.

The spas destination rejoins over 200 places of the whole territory of Romania, with natural resources of a great variety and therapeutic value (in present, it is known the possibility to use them in treating 14 types of affections). Among the Romanian balneal resorts there are known from the Romans time (e.g.: Herculane, Geoagiu-Bai, Ocna Sibiului, Calimanesti-Caciulata). Starting with the eighteenth century, the capitalizing of this type of resources was extended continuously, being developed and promoted on the international level the new resorts as Sovata, Vatra Dornei, Covasna, Eforie Nord, Neptun etc. The special potential and tradition of the balneal resorts known due to their results of treating successfully different affection of human body situate Romania on the first places of the top on this segment of European tourism market. The main features of the Romanian balneal potential, respectively *the particularities* of a great interest for tourism are as follows:

- *The presence of all types of resources from the category of mineral therapeutic substances* (mineral waters which are a thermal and thermo-mineral, volcanic lakes, salty climate and therapeutic gases). For example the Romanian mineral waters have a physical-chemical and thermal structure of a great complexity (it means that there are represented all categories of waters known all over the worlds) and there are some important reserves, concentrated especially into the mountain regions, but also into the under-Carpathians and on the fields;

- *The existence of some natural substances of this type, with character of rarities and/or uniqueness.* It is the case of the therapeutic lakes that are located in few places in Europe and whose value became known starting with the nineteenth century, after using them for the first time in Romania, at Balta Alba. Also the features of our country are the gases of solfatara considered to be a rarity of the nature, unique on the European continent. Practically, there are few resorts in the worlds same to the Romanian ones in which the natural substances of type mofette associated with mineral waters have the qualities necessary for the treatment of a large palette of affections especially the cardio-vascular ones. The features of rarity/uniqueness distinguish also the *therapeutic Salinas* that, through their specific climate, have a great efficacy in treating some respiratory affections and they are also pretty rare in Europe;

- *The high curative value and significant geological reserves of the Romanian balneal resources,* both by types and by categories of substances, allow to exploit them efficiently. That is their intensive use, on the one hand through all the forms specific to the balneal cures, and on the other hand through the multitude of affections that are treatable with same type of substance.

The special potential and tradition of the balneal resorts known due to their results of treating successfully different affection of human body, situate Romania on the first places of the top on this segment of European tourism market.

These above-mentioned particularities of the seaside and spas may explain also the significant values of the indices of tourists accommodation capacity at this destinations' level (represented in table 4). In particular, NUBPI exceed the national average in 2004 entering into the interval of the international average values of reference (48,6% in the case of spas and 41,8% in the case of seaside). But, even if the

Danube Delta and mountain resorts as tourist destinations have lower NUBPI (28.3% and 22.6%) they have a similar valuable potential that must be highlighted.

So, the *Danube Delta* is the second delta in Europe (in size), having been composed of a dense network of channels and lakes, alternating with the beach in a special way. From its way of composing and also from the variety and originality of landscape and fauna, this destination conserves a special tourism potential, considered to be unique in Europe. This argues for the present statute of the Danube Delta, internationally recognized as a *reservation of the biosphere*, with 18 areas extended on a surface of almost 500 kmsq that represents an area strictly protected, opened only for authorized research. Practically, certain features of the delta area are considered real records ones being nationally, and the others European (INCDT, 2005): •it is the youngest unit of relief in Romania; it includes: •the most compact bushy area (almost 240.000 ha); •the biggest sand dunes (almost 20.000 ha) and •the bigger lake in the country (Razim – 415 kmsq); •the biggest beach of Romanian littoral of Black Sea (almost 30 km length and 1-2 km width); •the biggest river-sea grind (Letea – 17.000 ha); •the most eastern town in Romania (Sulina), situated at •the smallest altitude (3,5 m); •the richest and more diverse ornithological fauna in Europe (over 300 species); • the biggest reservation of wet fields in Europe (2.681 kmsq). Evidently, these features influence generally the tourism in this area, characterized particularly by the elements of great attraction that offer different motivations for some many categories of tourists. So, among the *particularities* that give special attraction to the Danube Delta can be mentioned as follows:

- *The originality and momentousness of the landscape* (aquatic surfaces combined with bushes, marsh areas and marine and river grinds with oak forests and willow and aspen parks, the sea beach and sand dunes with arid and exotic landscapes). Also spectaculars there are the *water mirrors* (especially the Danube arms, the channels, small and big lakes), which constitute some places for trips, recreation and sportive fishing and also it constitute the main ways of touristy access and circulation in the area;

- *The variety, wealth and specific of the flora and fauna* (over 1,150 species of plants, over 300 species of birds, different as geographic origin and of scientific, esthetic and hunting interest, depending on the case). There are special the great reed bush areas and floating islands, also the willow forests, black aspens and thermo-phylla oaks with dense netting of lianas, wild grapes and clematis, which give an exotic charm of tropical and luxuriant forest for the landscape on the grind of Letea and Caraorman;

- *The specific of beaches* answers to some different touristy motivations (visiting the delta from Salina to Saint Gheorghe, heliotherapy cures, complex programs sea – delta, great activity for the tourists);

- *The climate*, benefit to practice the tourism from spring to autumn (each season offers original attraction, but the most beautiful season seems to be the autumn, the most favorite season of the hunters and fishermen and also of the landscapes lovers);

- *The cultural-historical specific* (given by many historical vestiges, original elements of ethnography, folklore and even by life style of the delta inhabitants, etc.)

In these conditions, the potential of this incredible “waters land” transforms the Danube delta in one of the most valuable and complex Romanian tourist destinations,

sustaining the development and promotion of offers that can enter into different segments of international tourism market.

Finally, *the mountain resort* is represented in Romania by the Carpathians (it was talked about them as about a basic component of the relief, through its length, position, configuration, structure and altitude), these mountains being located as a coronet around a plate limited by many depressions well individualized and covered. In comparison with other mountain chain, the Carpathians are young, of average height (peaks over 2,000 m among which 10 have over 2,500 m) and a reduced height with round peaks not more 30 km length. The transversal dales that fragment them and also the 300 intra-mountain depression, crossings and planes facility connection with the extra-Carpathians areas. Even if they have important competitors, especially through their height and snow layer (as the Alps, Pyrenees and Tatra Mountains), the Carpathians are imposed as a tourist destination important for Romania, with some *particularities* that give them a distinct place into the hierarchy of European mountain systems, respectively:

- *Diversity of the landscape* associated to the geological structures, types of relief, and also to the alternance of mountain units with the under-mountain and depression ones (alpine and glacial landscapes into the Fagaras, Retezat, Rodna, Parang mountains; karstic landscapes into the area of the Aninei, Cernei, Bihor-Vlădeasa, Mehedinți mountains, calcareous abrupt in Piatra Craiului, the keys and defiles of Bicaz, Oltet, Olt, Jiu, Danube rivers);

- *Accessibility* due to their central position, configuration, small altitude and the fact that they are crossed by numerous valleys and river courses, which favors the easy access to the peak areas, even for the tourists who are not specially trained;

- *The rich cave potential* (the over 10,000 caves from the Carpathians situate Romania on the third place in Europe; some of them have an exceptional esthetic and/or scientific value, others have even the state of nature monuments or reservations, as for example are Topolnita, Ponor Cities, Iceberg from Scarisoara, Bears cave);

- *The complexity* is given by the variety of the relief forms, associated with the presence of a rich hydrographical network (numerous rivers, hundreds of natural glacier, tectonic or volcanic lakes and tens of accumulated lakes) and of an exceptional hunting base (the number of big carnivores is in the Carpathians of 10-20 times bigger than in the Alps, the Romanian mountains containing the greater part of wolves and brown bears of Europe). As a result, in this area it can be found some of the most beautiful national parks and natural reservations in Europe (these reservations protect an area of 75,000 ha). Some of them, as the one from Retezat Mountain, have a statute of national parks, including some species of very rare flora and fauna.

The general image over the potential of this tourist destination can be completed by other elements of attraction as the important fish base, the opportunities of practicing the winter sports and the cultural-historical, ethnographic and folkloric specific of the human places. All these support the promotion of vary offers, especially related to the segments of sportive, thematic and adventure tourism, also to the alpinism, trips, sky, hunting and fishing, active holydays into mountain resorts and agro-tourist boarding houses, rafting, gliding, cave studying, scientific research etc.

CONCLUSIONS

It is very important that by this sort of particularities, the Romanian tourism offer can be adjusted to the international tourism market demand's features for each of the ten segments considered by WTO as being the most important and/or dynamic during the last period: seaside, sports, adventure, cultural, urban, rural, cruises, theme, MICE (Meetings, Incentives, Conferences and Exhibition) and ecotourism' segments (quoted by National Institute for Tourism Research and Development, 2005: 1). But nor these natural strengths themselves, nor EU integration are not a warranty to the fact that the foreign tourists will be more attracted by the Romanian tourist destinations. This is rather a chance that has to be capitalized. In other words, it has to be solved the present issues of the Romanian tourism through:

- Improvement of the tourist product/services quality as well as the regional infrastructure conditions;
- Construction of the image identity for the tourist destinations and their aggressive promotion on the international market;
- Diversification of the market segments that are aimed to be reached, including neighboring region (the East and Central European Country, not only the EU members).

This will require substantial investment efforts not only in "hard" components of the tourism industry (related to infrastructure) but also in the "soft" ones (such as personnel training, management and marketing), so as to attain the quality level, which is needed for successfully competing on international market.

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