

DATOURWAY

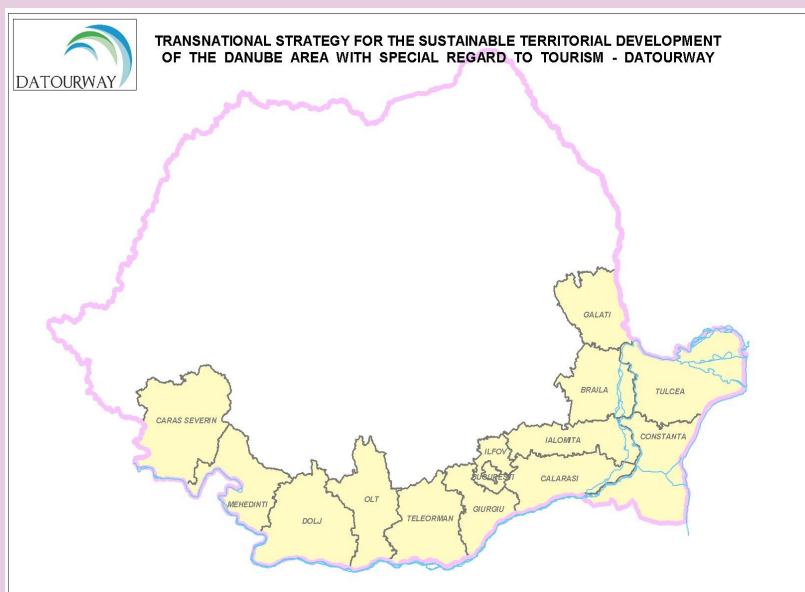
The national analysis
of the territorial tourism strategy

Romania



Position of the DATOURWAY area and macroregional relations

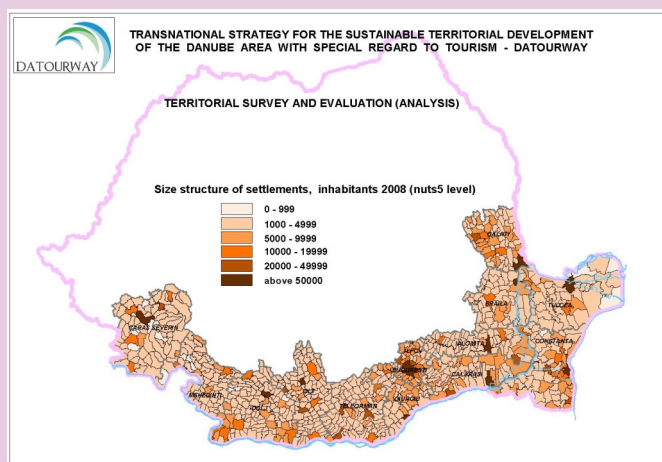
The Danube is the second largest river in Europe both in length (2.857 km) and in flow (approximately 5.600 m³/sec when it enters Romania). Danube represents a real axis of Central Europe, which it connects to the Black Sea and the more remote areas of Central Asia. It represents the linking element for 10 European countries: Germany, Austria, Slovakia, Croatia, Serbia, Hungary, Romania, Bulgaria, Moldavia and Ukraine. The Danube region has an insufficiently harnessed potential for economic growth. Being declared a part of the European Union's Pan European Transport Corridor VII, the Danube represents an important navigable route linking, through the Rhine-Main-Danube canal, the port of Constanța, the industrial centres of western Europe and the port of Rotterdam. The extended Danube basin includes countries and regions that, in the future, could benefit from direct access to the Black Sea, and the importance of connecting the European Union with the broad region of the Caucasus and Central Asia has already been significantly agreed to by the Black Sea Synergy.



The Danube's macroregion is an extremely heterogeneous area culturally and socially, characterised by a great diversity from a linguistic, ethnic and religious point of view. The Danube river is an important catalyst for creativity and intercultural dialogue. The Danube region is characterised by its linguistic and cultural diversity, resulted from stratified historical influences and confluences, which materialised in the variety of mobile and fixed cultural heritage objects, as well as in the appearance of creative patterns that irradiated in the Danube basin. Culture and the protection of patrimony could thus constitute an important area for cooperation.

From the spatial planning perspective it is necessary for this strategic planning exercise for the Danube region to focus on a somewhat delimited study perimeter, in order to be able to establish the objectives and the priorities for the respective territory.

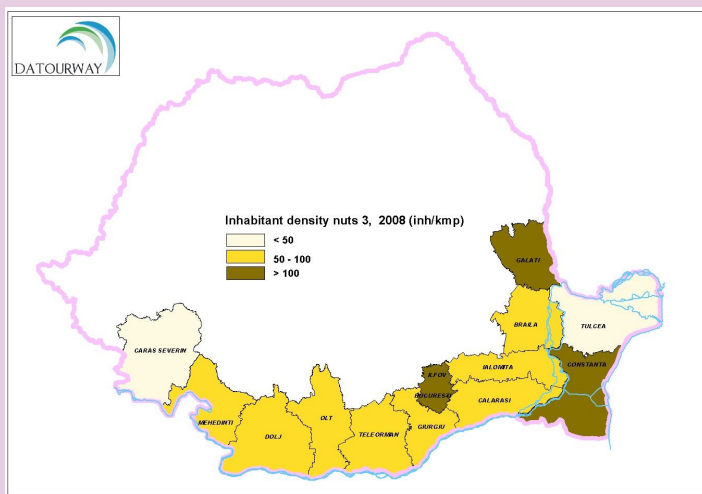
Settlement structure of the Romanian Danubian zone is insufficiently developed, especially concerning centres of regional importance. The Capital Bucharest, with almost 2 million people, is the biggest municipality in the country. Bucharest is occupying place no.6 among the European metropolis and has the biggest populations' number among the East-European cities, determining preferential investments. The region has 5 of the main 10 cities in Romania: Bucharest, Constanta, Craiova, Galati and Braila. Urban network is not enough sustained by above 300.000 inhabitants class towns and 80% of settlements have less than 10 000 inhabitants.



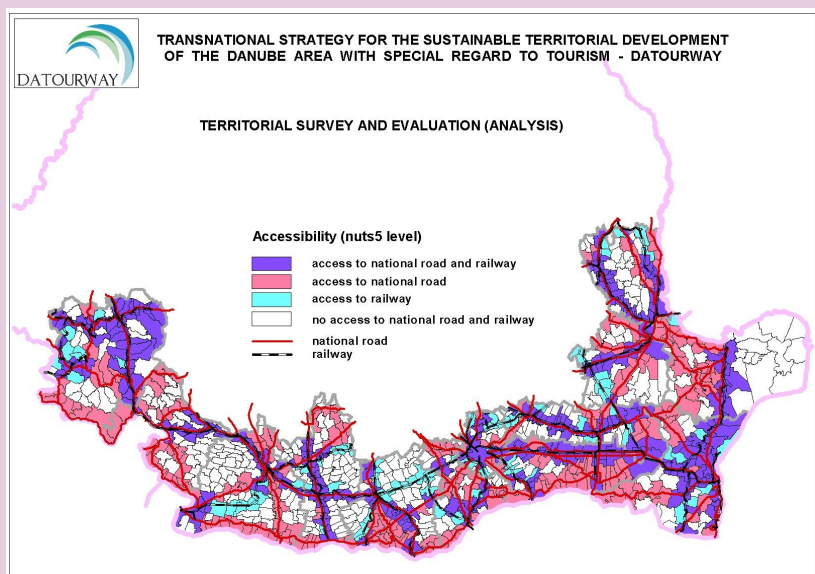
The region density of studied area, excepting Bucharest, is under national value (73.6 inhabitants/km²). This situation is influenced by a low level of rural density, specific to this region (41.2 inhabitants/km²), urban density at national level being 91.44 inhabitants/km².

Regarding the demographic issues must be pointed the fact that the total number of the population in the area is decreasing and, consequently, almost all cities and communes have declining characteristics. Towns and cities concentrate 63.9% of the total population, with diminishing trends. The urban population is concentrated only in Galati, Braila, Constanta, Caras-Severin and Dolj counties which have more urban population than the rural one. The general economic decline of the country generated a new type of migration in the region, from urban to rural, and the continuous decreasing of urban population.

Most of counties belonging to the region registered a negative average population growth in 2008 comparing with 1990. The age structure is characterized by the demographic ageing of the population, due mainly to the decreasing of the birth rate. Major causes for the study zone's population decline where: low birth rate and net migration out of the zone. Ilfov and Constanta County presents one of the biggest densities of population. Ilfov because its position around the capital, Bucharest. Constanta witch include most of Romanian seaside. Instead, Tulcea, the county that include the Danube Delta has one of the lower densities of population.



Accessibility in the Danube area is poor. Lack of Danube crossings make difficult to access transport networks of European importance. The poor accessibility of communes to the main network of transport respectively location on a DN or CF of the communes, the viability of communal and county roads that provide the link between towns, lack of links to the major transport network, access of population to facilities and services of superior level (link to urban localities of superior rank) made the accessibility of rural localities is a major problem and constant over time. The different access of region to the county national and international transport infrastructure cause disparities in tourism development except the counties of Bucharest-Ilfov and South-Muntenia regions.



The inadequate and low developed transport network hinders the development of small and medium-sized cities, the communes and villages (the villages from Danube Delta), causing even the isolation of some localities.

The main problems of public road network at regional level is represented by the insufficient capacity to take heavy traffic and heavy vehicles (especially in Bucharest-Ilfov region), the existing of a single and incomplete motorway A2, leading to decrease of driving speed, increased travel time and high consumption of fuel.

Share of modernized roads in these regions is low, which has negative consequences for attracting large territories in productive economic activities. Almost half of all modernized roads are in an advanced state of degradation due to intensive exploitation of roads that link towns and development poles in the region, border areas with other regions. All the major roads usually carry heavy traffic with both trucks and passenger cars.

This region also includes the international corridors IV road/rail, IX road/rail and corridor VII Danube which will add additional traffic in future but in present also, for industrial and commercial activities. Besides these, the region has direct access to other important transport axis that connects it to the neighbouring countries, as well as to the rest of the continent. The most important roads for this region are A2 (in construction), E60, E70, E81, E85, E87, E79, E574, E584, E771, E671, E675, most of them being in good condition or rehabilitated.

The Romanian Danubian region benefits by points of control and border passage for mixed traffic of passengers, merchandise and cars, existing in the counties Teleorman, Giurgiu, Calarasi. The most important is the border passage control point and custom terminal for merchandise Giurgiu, through which it is carried out one of the main connexions between the countries located in Western and North – Western Europe and the Middle East, on the road E85 (Romania - Bulgaria).

Here have to be mentioned the under construction rail/road bridge with Bulgaria (Calafat-Vidin) which will replace the current river ferry. Also have to be mentioned the road bridge border crossing at Drobeta Turnu-Severin. The bridge links the Danube zone to Eastern Serbia.

The existing transport infrastructure has to be modernised and continuously developed in order to achieve the high European standards.

There is a civil airport for air transport of passengers and merchandise, Romania's biggest airport (Otopeni Airport) in Ilfov County and also there are two airports are operating the International Airport Mihail Kogalniceanu and a utilitarian airport from Tuzla in Constanta County.

The region benefits by the main trans-European navigation thoroughfare, Danube River. The construction of the Danube-Black Sea Channel allowed for the creation of a river way of great Euro-

pean importance. The study zone contains all Romanian ports: 2 maritime ports (Constanta and Mangalia) and 17 naval, commercial and even industrial ports to the Danube (Moldova Noua, Orsova, Drobeta Turnu-Severin, Calafat, Corabia, Turnu Magurele, Zimnicea, Giurgiu, Oltenita, Calarasi, Cernavoda, Harsova, Macin, Braila, Galati, Tulcea and Sulina). These ports towns alongside the Danube are less developed and are not attracting population.

Geographical characteristics



The natural and environmental characteristics underline the rich potential of the area for the development of various tourism activities. Danube River and the rich hydrographic network are important resource for tourism, offering a variety of ecosystems, of which Danube Delta Biosphere Reserve, RAMSAR site, UNESCO site, is the best preserved wetland in Europe. Along with the good natural conditions for practicing outdoor tourism activities, the variety of landscapes and variety of the relief (mountains to sea-side), spa resources the cultural heritage completes the richness of the tourism offer. In the analysed area, there are an important number of protected areas with diverse, rich flora and fauna with valuable exhibits, also having administrative structures with official documents (e. g. environmental reports, management plans, visitor plans) regulating the possible conflicts that might occur between tourism and environment.

Also, there are some restrictions for developing tourism activities in the area, most of them referring to the poor exploitation of the natural therapeutic resources, many floodplains on the Danube.



The analysed area along the Danube River includes a large variety of natural resources, offering a variety of relief forms, hydrological networks, vegetation, flora and fauna.

The Danube River - Lower Danube sector (the Romanian), 1075 km in length, begins with a spectacular and impressive gorge (Iron Gates), 144 km long, which crosses south west part of the Southern Carpathians, with a portion of 9 km long (called boilers - Cazane), with steep and calcareous slopes. Danube Gorge at Iron Gates is one of the longest and most spectacular cross-valleys in Europe and the biggest of the Carpathians.

Nearly all forms of *relief* in Romania mark the analysed territory: mountain, hills, plateaus, valleys, plains. In the west and southwest, the mountains occupy an important part of the territory, starting with Banat Mountains, Ţarcu Mountains, Godeanu and Cerna Mountain in Caras Severin County, and Mehedinti (well known for karst phenomena) and Almaj Mountains in Mehedinti County with altitudes between 600 and 2.200 m.



The mountain area continues with the Getic and Mehedinti Plateaus.

Natural therapeutic factors for balneal treatment:

- Therapeutic mud of salt lakes, spring waters is the base for the spa treatment in Chişcani, Vişani, Movila Miresei (Braila County).
- Sulphurous waters, containing sodium chloride and magnesium, salt waters in lakes Amara and Fundata (Ialomita County) are excellent in treating rheumatism.
- Sulphurous depth waters (over 100 m), deep thermal waters (over 3,000 m) (in the Giurgeni village, Ialomita County).
- Spring waters for treatment in Baile Herculane (Caras Severin County).

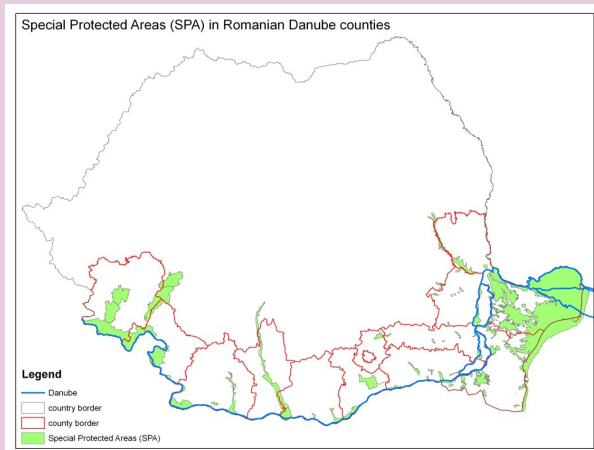
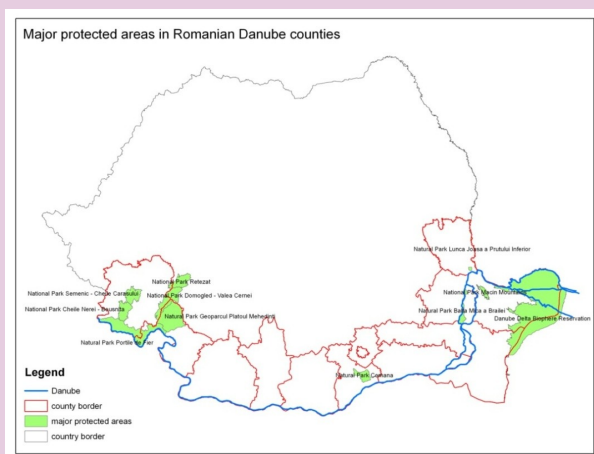


- Mineral waters from Bala (Mehedinti County) are as good as those of Herculane, and in some respects even better and stronger than them, but unfortunately mineral reserves are underused.
- Therapeutic mud, salt lakes, spring waters in Techirghiol, Eforie, Mangalia, Nuntasi (Constanta County).
- Black Sea Coast: The natural resources give high quality to spas cures: orientation of the beach to the east-southeast, long duration of sunshine during the summer (10-11 hours per day), thermal stability from day to day, rare precipitation, breezes, seawater, healing mud/sludge.

Nature conservation (nature protection areas, Natura 2000, ecological network)

In the counties bordering the Danube River are recorded:

- 11 out of 28 existing major national protected areas, National Parks, Natural Parks and Biosphere Reservations, (63.4% of their surface);
- 68 out of 273 Sites of Community Importance (SCI) established at national level (44.6% of their surface);
- 60 of the 108 Special Protection Areas for Bird (SPAs) established at national level (52.5% of the surface).
- 162 scientific reserves, natural monuments and nature reserves (category I, III and V IUCN).



Beside the natural resources, the diversity of the protected cultural patrimony including architectural, archaeological historical monuments, memorials and monuments of public forum represent valuable elements which could be capitalized through tourism. In the analysed territory, there are around 8,450 historical monuments of which 6.1% of category A (of national importance) and the rest of category B (regional importance). The highest number of monuments is in Bucharest (2628), of which 259 category A and 2,369 category B.

Unfortunately, some of the tourist sights in the cultural-artistic patrimony are affected by a profound degradation. In all the counties along the Danube are organized complex cultural events with national and international participation, important for the regional creative potential and raising the interest of communities, promoting the multiculturalism and ethnic and intercultural dialogue. Still, the interest of communities to participate in cultural life and to get involved in the initiation and development of inter-county and interregional projects is relatively low. Just a reduced number of cultural events have an international impact among the visitors. In some regions, the ancient traditions and customs are well preserved. In the riverside counties there is a rich folk tradition, ethnographic areas having a relatively diverse arts and crafts market, also with a diversity of folklore festivals reflecting many folklore areas in Romania (Banat, Oltenia, Muntenia, Dobrogea and Moldova) representing all the Romanian historical regions excepting Transylvania, some of them being dedicated to the Danube.

From the economic point of view, in the analysed region some disparities could be registered. Thus, ones the most developed counties in the country (Bucharest, Constanta, Ilfov) are encountered here, but the southern counties (Calarasi, Teleorman, Giurgiu and Olt) are low developed regions, mostly agricultural ones, known like economically backward regions.

In general, in the majority of the Danube counties, the economic sectors are low developed, the GDP/inhabitant average value (4,235 Euro) being lower than at country level (4,613 Euro). The business community is relatively low developed, especially in the south counties, the investment opportunities in various economic sectors being poor promoted. Even if, the number of enterprises/1000 inhabitants (31.3) is higher than national one (25.8), still there is an unequal distribution of the enterprises in the

territory, concentrating in particular in the urban areas. The number of active units operating in the territory is growing.

**GDP/inhabitant at current market prices at NUTS3 level
(2006)**

No.	County	GDP/capita in PPS-Euro
1.	Braila	3266.1
2.	Bucharest	10325.2
3.	Calarasi	2454.4
4.	Caras-Severin	3885.9
5.	Constanta	5908.4
6.	Dolj	3567.1
7.	Galati	3347.3
8.	Giurgiu	2516.2
9.	Ialomita	3315.5
10.	Ifov	8715.8
11.	Mehedinti	3111.1
12.	Olt	2749.0
13.	Teleorman	2664.4
14.	Tulcea	3476.3
	Area Average	4235.9
	Country Level	4613.6

Source: Romanian Statistical Yearbook, 2008

The region has a high agricultural and zoo technical potential, with qualitative agricultural lands. Agriculture is the main economic activities in Teleorman, Calarasi, Ialomita, Giurgiu, Olt, Dolj located in the Romanian Plain, but also in Braila, Constanta, Galati located in the southeast part of the country, absorbing a substantial number of persons employed providing them a source of income. Still, the agricultural holdings practice subsistence agriculture (poor mechanization, poor irrigation system) and they are mostly fragmented. The organic agriculture started its diversification and diversification of the agricultural production. Except for the counties with a mountain relief, the rest of the counties have a reduced forest funds and an increased degradation of the forest fund quality. Nevertheless, in some counties and especially Caras Severin but also Dolj and Constanta the hunting fund is valuable. Along with the opportunities offered by the Danube and other rivers, the hunting and fishing tourism offer a real potential of development.

The number and surface of the hunting fund, in the counties analysed

No.	County	The number of the hunting funds	The total surface of the hunting funds (ha)
1.	Brăila	50	462,955
2.	Caraș Severin	76	827,445
3.	Călărași	49	483,725
4.	Constanța	56	658,344
5.	Dolj	77	693,149
6.	Galați	44	418,312
7.	Giurgiu	43	327,431
8.	Ialomița	44	424,427
9.	Ilfov	22	157,752
10.	Mehedinți	40	481,719
11.	Olt	57	492,073
12.	Teleorman	62	563,094
13.	Tulcea	54	598,701
	TOTAL	674	6,589,127

Source: Order no. 193/2002

The industry sector suffers a process of restructuring and even decline of some branches. There is a high number of mono-industrial areas and de-industrialization in some other areas and the level of industrial innovation is relatively low. Due to the fact that the analysed area is large, there is a relatively high diversification of the industrial sector in the analysed area, including extractive industry, manufacture and electric and thermal energy, gas and water. Still, there are an important number of mono-industrial areas affecting the sustainable development of the urban zones, where the main industrial activities are located. The service sector has a low contribution to the development of the regional economy in general and of the tourism sector in particular.

Number of enterprises/1000 inhabitants and the share of trade enterprises and hotels in all services enterprises (2008)

No.	County	Number of enterprises/1000 inhabitants	Micro-enterprises (0-9 employed) %	Enterprises of services %	Enterprises of trade %	Hotels and restaurants %
1.	Braila	19.8	88.8	76.0	63.6	6.0
2.	Bucharest	60.6	89.5	82.3	40.5	2.8
3.	Calarasi	16.0	89.3	72.2	67.6	4.7
4.	Caras-Severin	17.1	89.4	71.6	54.0	8.9
5.	Constanta	32.8	89.3	78.7	48.5	9.0
6.	Dolj	20.4	90.2	79.3	63.8	5.3
7.	Galati	20.8	89.3	78.9	64.7	5.7
8.	Giurgiu	15.0	91.1	71.2	62.9	4.8
9.	Ialomita	14.8	87.8	71.8	63.3	6.1
10.	Ifov	39.9	87.8	75.8	52.2	3.2
11.	Mehedinti	14.2	89.5	79.9	60.9	8.2
12.	Olt	13.9	91.1	74.2	68.2	5.8
13.	Teleorman	13.0	91.4	77.3	72.2	4.8
14.	Tulcea	19.3	88.9	74.7	57.5	8.3

Source: National Institute of Statistics, TEMPO online database

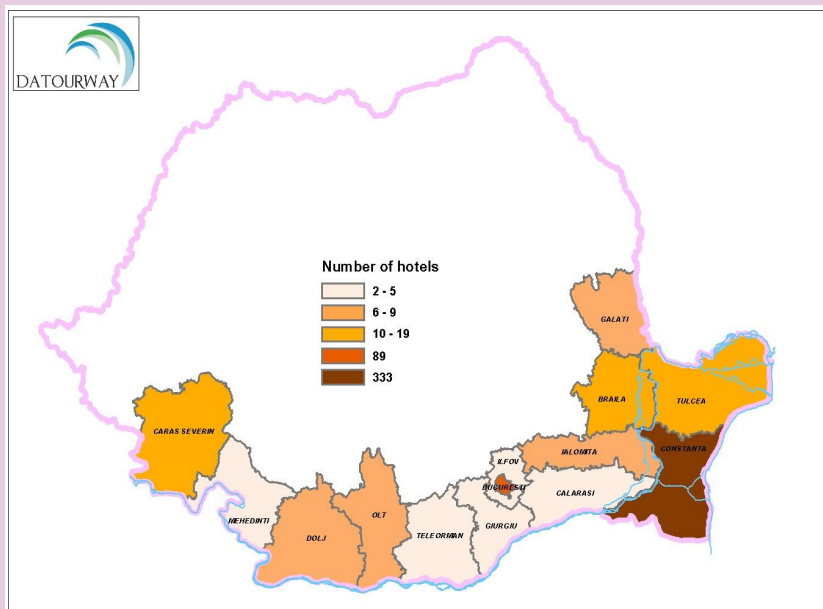
Tourism sector

Tourism, as a service sector has a real potential for development in the analysed area, but insufficient valorised at its full potential, due to various economic, social, environmental restrictions. The tourism activity is mainly concentrated in the west counties (Caras-Severin) and south-east counties (Constanta, Tulcea and Braila) where the tourism facilities are more diversified. The network of trade units is insufficient developed so they could satisfy the tourists' demand for goods and services. Improving the tourism infrastructure in the pilot area can be a priority for tourism development. Still, in some countries like, Tulcea or Caras-Severin, tourism has represented a real alternative for the economic recovery, an alternative to agriculture or industry. Boarding houses for tourists were opened in the last years, permitting the start up of rural tourism, agrotourism, mountain tourism, silvo-tourism.

Accommodation units by types in the analyzed area, in 2008

	Total	Hotels	Hotels for youth	Hostels	Motels	Inns	Villas	Chalets	Hunting / fishing Chalets	Urban tourist boarding houses	Rural tourist boarding houses	Camping places	Holiday villages	Bungalows	Scouts and pre-school camps	Houselet - 1 type units	Ships accommodation spaces	Private accommodation
Caras Severin	119	19	2	2	5	1	15	7	0	29	24	0	4	0	2	7	1	1
Mehedinti	20	5	2	3	2	0	1	0	0	5	1	0	0	0	0	0	0	1
Dolj	22	7	3	2	3	0	3	0	0	4	0	0	0	0	0	0	0	0
Olt	9	8	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0
Teleorman	9	5	0	0	1	1	0	0	0	0	0	0	0	0	0	2	0	0
Giurgiu	12	2	0	1	7	0	0	0	0	0	0	0	0	0	0	0	2	0
Calarasi	8	2	0	0	3	0	0	0	0	1	2	0	0	0	0	0	0	0
Ialomita	17	7	0	1	4	0	1	0	0	0	1	1	0	0	0	1	1	0
Galati	21	9	0	1	0	0	0	8	0	0	0	0	0	0	0	3	0	0
Braila	23	13	0	0	2	0	2	0	0	1	0	0	1	0	0	2	2	0
Constanta	1021	333	6	6	4	0	315	1	0	43	33	18	0	0	206	12	29	0
Tulcea	107	17	0	0	0	1	52	1	0	8	14	1	2	1	1	1	2	4
Bucharest	185	89	1	4	0	0	2	0	0	27	0	0	0	0	0	0	0	62
Ifov	45	5	0	0	3	0	6	0	1	4	10	0	2	0	3	5	2	0
Bucharest-Ifov	230	94	1	4	3	0	8	0	1	31	10	0	2	0	3	5	2	0
Total	1618	521	14	20	34	3	397	17	1	123	85	20	9	1	212	33	37	6
																		85

Source: Romanian National Institute of Statistics, Ministry of Tourism



In the Danube riverside area, an important number of resorts (17) with traditions in mountain, seaside, balneal-climatic tourism, internationally and nationally recognized are located especially in Constanta (Cap Aurora, Costinești, Eforie Nord, Eforie Sud, Jupiter, Mamaia, Mangalia, Neptun-Olimp, Saturn, Techirghiol, Venus), Caras Severin (Băile Herculane, Crivaia, Semenic, Trei Ape), Ialomita (Amara), Ilfov (Snagov) counties. The concentration of the accommodation infrastructure especially in the tourism resorts and urban areas creates disparities in the territory, but still the lodging offer is a relatively diversified one. The development of the tourism activities is also sustained by the initiation of some financing projects for tourist infrastructure, including tourist information and promotion centres by the Tourism Ministry. But the number of tourist information and promotion centres (in cities and also in the areas of national and natural parks) is insufficient and the services they offer and their working program are limited. The natural conditions offer possibilities for recreational activities, starting with hiking, horse riding, cycling, golf, but the diversification of corresponding infrastructure for the tourists is relatively low.



Despite the rich balneal, therapeutically natural resources present in counties like Braila, Ialomita, Caras-Severin, Mehedinti, Constanta, the spa resorts and thermal baths are largely dependent on social tourism (subsidized by the state) and the medical facilities in the spa resorts are not up-graded. In general, the tourism offer has a low competitiveness of foreign market.

The tourist flows in the analyzed area represents 36.3% of the total tourists accommodated in Romania in 2008. The highest number of tourists lodged in Bucharest-Ilfov (40.1%), followed by Constanta (37.8%), Caras Severin (4.0%), Tulcea (3.7%). Disparities between the counties regarding the number of guests and high concentration of the arrivals in Constanta County are registered. Regarding the foreign tourists, their number reached 720 thousand persons, their large majority preferring Bucharest-Ilfov region (80.6%) especially for business purposes, followed by Constanta (9%) and Tulcea (2.4%). As an average, from the total number of tourists arrived in the case study region, 27.9% were foreigners. The tourism activity is seasonal, especially in the summer season the tourists flows are higher.

It is interesting to notice that exists a major interest of the county authorities in developing tourism sector as a priority area for the county development, until now being developed local a few strategies for stimulating tourism activity in the cross-border area Romania-Bulgaria. Still a poor number of partnerships exist in the tourism field among for example local administrations and tourism organization.

SWOT

Strengths

- The existence of Pan European corridors IV road/rail, IX road/rail and corridor VII Danube;
- The existence of European roads E60, E70, E81, E85, E87, E79, E574, E584, E771, E671, E675;
- High density of the county and communal network of roads;
- High density of the rail network;
- The percentage of homes connected to broadband Internet has increased between 2006 and 2009;
- Extended market of Internet services;
- Development of central heating systems in individual or a small number of users;
- Danube River, important resource for tourism; Major interest of the county authorities in developing tourism sector as a priority area for the county development;
- Traditional market for local and cross-border tourism;
- Danube River has a variety of ecosystems; Danube Delta Biosphere Reserve, RAMSAR site, UNESCO site - the best preserved wetland in Europe;
- Good natural conditions for the practice of tourism activities outside;
- Rich hydrographic network – rivers, natural or manmade lakes;
- Variety of landscapes, variety of the relief (mountains to sea-side);
- Natural areas untouched by the human intervention;
- Rich ichthyofauna especially in the Danube Delta and many areas suitable for fishery;
- Endemic species (flowers and animals) and a wide habitat for birds;
- The existence of spa resources;
- The diversity of the protected cultural patrimony including architectural, archaeological historical monuments, memorials and monuments of public forum;
- Diversity of folklore festivals reflecting many folklore areas in Romania (Banat, Oltenia, Muntenia, Dobrogea and Moldova), some of them being dedicated to the Danube;
- A complex cultural market with highly segmented interests;
- Rich folk traditions with the existence of ethnography areas

with various traditions and customs, with a relatively divers arts and crafts traditions;

- The presence of ones the most developed counties from country (Bucharest, Constanta, Ilfov)
- Relatively high diversification of the industrial sector in the analysed area (e.g. extractive industry, manufacture and electric and thermal energy, gas and water);
- The generally growing number of active units operating in the territory;
- Significant wood stocks, forestry being the main source for the wood industrialization;
- Valuable hunting funds;
- The presence of an important number of resorts with traditions in mountain, seaside, balneal-climatic tourism, internationally and nationally recognized;
- The presence of the accommodation infrastructure in the territory being a relatively diversified one;
- The initiation of some financing projects for tourist infrastructure, including tourist information and promotion centres by the Tourism Ministry;

Weaknesses

- Poor cooperation among the tourism operators in the country and in the cross-border area;
- Lack of regional strategies for tourism in a larger context of a national strategy where the representation role should be of the regional tourism promotion associations;
- Poor number of partnerships existing in the tourism field among local administrations and tourism organization;
- No correlation among the initiatives for tourism development and the national programmes of general infrastructure development;
- Insufficient financial resources especially in the local councils to implement new development projects;
- National roads with only two lanes;
- Existence of sections of national roads requiring works to improve transport infrastructure;
- Existence of a single motorways - A2 under construction
- Lack of express roads network;
- Low number of variants of the town roads, factor of noise and

air pollution in localities;

- Precarious status of local road network – county and communal roads;
- Difficult access in some rural areas and tourist zones;
- Poor exploitation of the natural therapeutic resources;
- Disappearing of many natural habitats because of damming;
- Desertification on some areas neighbouring the Danube due to climate changes;
- Degradation of existing flood protection systems because of lack of maintenance, as well as missing of repair works after flooding;
- Bad use of land located in flood risk areas;
- Overcrowding of tourist areas through construction zones without authorization or which do not respect the environment;
- Poor exploitation of the natural therapeutic resources;
- Disappearing of many natural habitats because of damming;
- Bad use of land located in flood risk areas;
- A profound degradation of some tourist sights in the cultural-artistic patrimony;
- Insufficient financial and human resources in relation to cultural programs and projects;
- Poor implementation of the laws regarding the building conservation and methods to maintain the architecture characteristics;
- Low development of the economic sectors in the majority of the Danube counties;
- Intensive use of forest areas and the reduction of areas with forests older than 100 years;
- Low capitalization of wood and old technologies for the exploitation of wood;
- Lack of many entertainment facilities such as golf courses or aqua parks;
- Lack of up-graded medical facilities in the spa resorts;
- Largely dependency of the spa resorts and thermal baths on social tourism (subsidized by the state);
- The insufficient number of tourist information and promotion centres (in cities and also in the areas of national and natural parks);
- A reduced number of specialized human resources and a not

too good quality of the presentations and translations in museums;

- Relatively high seasonality especially in the summer season;
- Concentration of the accommodation capacity in some distinctive areas, especially in the urban ones and in the tourism resorts;

Opportunities

- The present projects having various stages of implementation focused on the infrastructure development, especially in the tourism areas and areas with tourism potential;
- Raising funds for economic-social development in the cross-border area through projects financed through Structural Development Funds and developed both individually and in partnership;
- The existence of the financing opportunities designated to develop the tourism sector (aqua-parks, horse-back riding, rehabilitation of spas, new visiting centres and information locations), valorising the tourism offer and the elements of the national heritage, through European, governmental Funds;
- The existence of programs in the Lower Danube Euroregion, which facilitates partnerships for drawing up programs and cultural projects;
- The creation of the favourable conditions for the valorisation of the natural and cultural resources to develop commune tourism products on the banks of the Danube;
- The intensification of the cross-border cooperation and the multiplication of the cross-border partnerships;
- The openness of the existing projects of the sustainable development concept.
- Special interest at European level to keep folklore traditions of local population;
- The possibility to access Community funds which should be used for the rehabilitation of the cultural infrastructure;
- The entrepreneurship development and increasing volume of investments in the last years;
- Good prospects for the development of mountain tourism (recreational tourism, silvotourism);
- Diversification of the rural economy by encouraging the intervention through government funding from the European Union

- Existing potential for the development of the tourism sector, recreational tourism and Danube cruise tourism;
- Increasing interest for the development of rural tourism and agrotourism;
- Increasingly demand for spa services specially coming from great urban centre;
- Aging population in Western Europe which is a potential for spas located on the Romanian side of Danube territory;
- Possibility of specialization on thalasso-therapy for spa resorts situated on the Black Sea seaside (Eforie, Mangalia, Techirghiol);
- The existence of policies that foresees the development of equestrian tourism according to the strategy elaborated by National Equestrian Authority;
- The increased interest for eco-tourism as a distinct niche segment specially in protected areas;
- Existence of national programs of modernization for road transport sector;
- Development programs of railway national network;
- Construction of highway and express road network;
- Rehabilitation and modernizing of infrastructure for road, rail and naval;
- The extension of Internet network throughout the county;
- Existence of government programs to support investments in rehabilitation and expansion of water networks, sewerage and wastewater treatment;

Threats

- Maintained attitude of inertia in the development of the tourism sector
- Low exercise of the local autonomy and the excessive fiscal burdens, through various taxes and fees;
- Low level of absorption of the European Funds in the cross-border programmes for financing from the EU;
- The reduction or delaying the investments for projects with funds from the European Union.
- Climate changes effecting the ecosystems and bioclimate;
- Pollution of the Danube River because of uncontrolled discharges;
- Unauthorized constructions;

- Poor involvement and understanding by public authorities for the appropriate exploitation of tourism development not affecting the environment;
- The volume of foreign investments is still small compared with the national average and the requirements of modern development;
- The internal competition as well as the international one in the tourism field;
- Changing of European routes by avoiding the national territory;
- Assigning of low resources for road and rail;
- Port towns alongside the Danube are less developed and are not attracting population;

CONFLICT AREAS

Conflicts between tourism and environment

Tourism has both negative and positive effects upon environment. Particularly the negative effects of tourism in relation with the environment could occur in what could might call a conflict between tourism and environment.

There is an environmental pressure of tourism as a result of both tourist physical presence and developing tourism facilities. For example, in Dolj County when assessing the tourism impact upon environment, they consider the following negative aspects of tourism development (Dolj Agency for Environment Protection, 2008):

- Uncontrolled tourist flows (outside the official trails): damage of soils and vegetation, disturbing wildlife, fire starting.
- Increased tourist flows: disturbance on the environment, changes in animals' behaviour, increased pollution.

In the meantime these negative impacts of tourism could be overcome with some specific means such as proper capitalization of all natural resources, system for storage and recycling the garbage according to the ecological norms, forbidding of exploitation of timber and poaching unauthorized, reorganization of tourist activities, development of non-polluting means of transport etc. (Dolj Agency for Environment Protection, 2008).

A special issue of the environment pressure of tourism is uncontrolled tourism. This also recognized by Comana Natural Park which sees in their management strategy that uncontrolled

tourism could greatly affect habitats and biodiversity by the presence of tourists in the reproduction areas of species, specially the case of birds during the nesting and rearing offspring, by taking eggs or capturing the chicks (Management plan of Comana Natural Park). The presence of tourists in unorganized, uncontrolled way (including camping, lighting campfires, noise) in some areas where there are habitats or protected species, flora and fauna will lead gradually to their degradation.

In this regard, another aspect could be chaotic development of tourism infrastructure, particularly in the case of vacation homes. The construction of vacation homes directly on the Danube's shore is a threat directly on biodiversity, both as an aggression on the shore ecosystems, as well as the river ecosystem due to discharge of sewage directly into the Danube as it is stated in the draft Management Plan of the Iron Gates Natural Park (Caras Severin and Mehedinți counties). This relates to the issue of visual pollution particularly in case of failure of urban planning rules in the targeted area. In the last five years, in the park, namely the on Danube bank (inside and outside built area) there is a trend of building second homes, without a certain architecture style, many of them showing a lack of aesthetic taste and leading progressively to the loss of landscape values in the park area (Management Plan of Iron Gates Natural Park). Therefore, in the name of so-called "exploitation of tourism potential" there is a pressure on natural protected area in order to permit the construction of holiday homes and urbanization and which is badly managed by local authorities. This is a strong threat, as there are needs and calls for building a very large number of holiday homes located on the Danube at the expense of habitats and landscapes. Also, the „bad habits of visitors" could produce a sort of visual pollution. In this regard Semenic-Cheile Carasului National Park identifies some negative impacts of visitors such as deterioration of bark trees, graphite drawing on cave's walls, cutting the trees and shrubs for the fire (Visitors Management Plan for Semenic-Cheile Carasului National Park, 2009).

Indeed tourism could represent a major threat to the environment conservation particularly to the Danube Delta eco-system. This brings some limitations in relation with environmental sensitivity. For example in Danube Delta the purpose is to promote "the exploitation of Danube Delta in a slow rhythm". A conflict between tourism and environment could arise considering the

complex relation between these. As we have seen in the Romanian Danube territory there is a clear pressure of tourism upon environment that has to be properly managed in a sustainable manner.

Conflicts between tourism and human resources

An important phenomenon, unrevealed by the official statistics, is the temporary labour migration abroad. Relatively recent studies of this phenomenon show that some of the region counties recorded high vales of temporary migration prevalence rates, in rural areas: Teleorman, Dolj, Giurgiu, Caras Severin, Mehedinti, Olt, Tulcea. Labour migration has generated a lack of personnel in certain fields, tourism being one of the most affected, particularly the hotel business, as indicated by studies on the labour market in Romania.

Rural areas especially and confronting with difficulties regarding the human resources and occupancy, among the causes being:

- lack of training opportunities for women and young people;
- poorness;
- aging population;
- low number of training institutions and trainers;
- poor access to infrastructure;
- low number of employed and remunerated people;
- low incomes per inhabitant;
- poor access to information and advanced technologies (computers, internet);
- modest cultural offer.

The entrepreneurial initiatives are relatively low in the analysed territory, especially in the tourism field and other connected activities. The lack of motivation in developing a tourism business is generated not only by the lack of finances (initial amount of money to start a new business), but also the bureaucracy in starting a new company and in developing a project and apply for European Structural Funds (FEDR).). The youths are not appropriate trained to initiate a new business in the hospitality industry, and the special programmes to stimulate young entrepreneurship are missing. Still, the existing entrepreneurs in the tourism sector are opened in acquiring new information and specific knowledge and to participate to training courses.

Infrastructure obstacles in tourism development

Accessibility problem

One of the main causes of intra- and interregional disparities in tourism development is due to a different access of region to the county national and international transport infrastructure, and to its poor quality.

The counties of Bucharest-Ilfov and South-Muntenia regions have a better access to the transport infrastructure. Bucharest-Ilfov region concentrates the airports with the most national and international traffic. Four international roads, having a good access to the national and international road network, cross South-Muntenia region, with a significant section of national road network modernized.

At intra-regional level, the inadequate transport network hinders the development of small and medium-sized cities, the communes and villages. Many areas have a network of road transport low developed between localities (for example, the villages from Danube Delta), causing even the isolation of some localities.