

The Effects of the World Economic Crisis on the Tourist Market from Romania

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Abstract: Considering itself as a unique market, the European Union has the most developed economy from the sector of Travels and Tourism, now representing a share of approximately 40% of the world market. Obviously, its share has grown significantly during the last few years, according to the EU extension beyond its initial borders to the current 27 member states.

The EU dimension and its importance in the economy of Travels and Tourism explains why the World Travels and Tourism Committee (WTTC) has remained very active in the region, intensifying as well its activities in the whole Central and Eastern Europe in the last 12 months, in close collaboration with industry and individual government in order to try and increase the operational environment for Travels and Tourism. The activities include the promotion of members and the consolidation of the unfolding relations with industry and governmental leaders. It has been a year since the crisis has shown its "teeth" in Romania as well, implicitly in the Romanian tourism: bankruptcies, huge bank interests, financial blockings, lack of cash and thousands of unemployed people are some of the effects of the crisis. What have the travel companies and actors from this field and the people learnt from this crisis? This article is currently trying to present the most visible painful metamorphosis for the Romanian tourism, trying to make a correct diagnosis of the phenomenon. How do we survive the crisis? Despite all the predictions of the analysts, no one can say exactly when the crisis will end, as no one had anticipated when it would begin.

Business representatives have thought of a few solutions to survive crisis: low budget spending, a real policy for the recovery of the economy and for the solution of the economic and financial blockings, increasing consumption and exports, balance of exchange rate.

Key-Words: tourism, sustainable, economic crisis, diagnosis, tourist destination.

1 Introduction

The demand for Travels and Tourism in Europe in general is expected to grow with a relatively modest share of 2.3% in 2010, although this region masks the average growth which varies from country to country. Montenegro anticipates a powerful grow, of 14.2%,

followed by Romania with 8.9%.

The sector of Travels and Tourism is an inseparable part of the world we live in, having an essential contribution to the world economy, as well as to the quality of life of its citizens. This divides the achievement of the universal aspirations, of unifying

friends and families, the stimulation of the trading beyond frontiers, the creation of sustainable work places and the minimisation of the climate changes.

Or, the sustainable and responsible economic growth may be achieved only by overcoming all the inequalities regarding the welfare and opportunity, the increase of the international understanding, as well as the balance of the use of resources with their availability.

The number of tourists who have spent at least one night in Romania in 2009 has dropped significantly amid the crisis. Of the 4.3 million foreigners who have visited the country, only half have stayed more than one day. Meanwhile, many Romanians have decided to give up spending holidays in the country, although, according to a specific analysis, accommodation rates have decreased nationally by up to 20-30% compared to 2008.

The number of foreign tourists who visited the country in the first seven months of 2009 decreased by about 14% over the same period last year, to 4.29 million, according to official statistics. These show that only a little over 1.5 million tourists spent the night in our country, while other 719,000 stayed more than one night.

2 Problem Formulation

Most foreign visitors come from European countries such as Hungary, Bulgaria, Germany and Italy, according to the National Institute of Statistics (INS). The data show that overnight stays recorded in the tourist reception facilities during January 1 to July 31 totalled 9.3 million, down about 17% compared to the same period last year. Of these, the stays of the Romanian tourists represented 83.8%. Regarding the accommodation on several days, a decline of 13.6% was observed. Thus, there were recorded 3.45 million arrivals, of which 79.2% of Romanian tourists, and 20.8% of foreigners. However, the net utilization of accommodation in the same period was 26.9% on all tourist accommodation structures, declining by 6.5 percentage points. On the other hand, the customs points, 6.8 million departures of Romanian tourists abroad were recorded, down by 3.3%.

At the seaside, prices went up over the weekend, faced with the declining number of tourists, but also with a strong competition due to the increasing number of hotel rooms in service. The hotel managers came up with more tempting offers, according to the people in the field. "The largest decreases of tariffs were recorded in the capital, afferent to the segments of hotels 3, 4 and 5 stars, which reported mean

decreases from 25% to 30%. The same happened to the hotels in Europe, which continued, amid the crisis, to lower their prices, but the biggest reductions were recorded by the hotels in Moscow. With a decrease of 20.6% compared to the third trimester of 2008, Bucharest occupies the fourth position in the top 21 rate reductions and the 21st place in the hierarchy of the most expensive European cities. In a ranking of 30 cities, drawn up by the booking service, Geneva is the most expensive European city in terms of average tariff per room, of 195.29 euros.

Prices charged by hotels in the Swiss city fell in the third quarter of this year by 11.4% compared to the same period of 2008, when it increased to 220.51 euros. Geneva occupies the leading position worldwide as well, ahead of cities like New York (151.33), Tokyo (118.09) and Dubai (112.26).

In Romania, in the provinces, the tariffs have been slowly reduced, by about 8%, and in some tourist areas such as spas, the managers from the tourism field have managed to maintain last year's tariffs", according to an analysis of Capitan.Go, conducted at the level of 600 hotels in the country. The same study shows that, in the Prahova Valley, the largest price drops have been at 4 and 5 star hotels, with about 20%, the price per night being 67 euros, 82 euros respectively. At the same time, for 2 and 3 star rooms, prices have fallen by 13%, to 40-53 euros. Instead, at the seaside, frequent fluctuations of prices have been observed at the weekend, when the maximum number of customers has been recorded.

One aspect of tourism at the seaside, amid the crisis, is the sale of the rooms with high demand for the weekend at extra prices, justified by several advantages, such as the sea view, an upstairs room location or even the increased demand. These practices are not encouraged in terms of the responsibility towards the customer.

Romania has ceased to be an attractive tourist destination because of the competition, of the limited supply, of the inadequate infrastructure and services, according to the tourism development strategy published by the Romanian National Tourism Authority (NTA).

3 Problem Solution

According to the strategy, the Romanian tourism offer faces more problems. All the types of programs offered by Romania face a stiff competition on Western European markets, while competing destinations offer a wide range of facilities for all categories of tourists. Also, the Romanian offer is limited, restricted to a few resorts and there to only a

few hotels. The services are inferior to those of competing destinations such as Bulgaria, Turkey, Greece and Cyprus, while the entertainment is not up to the level of the other destinations.

These problems add to inadequate road and technical infrastructure, lack of superior hotels in major cities and tourist resorts of international interest.

In terms of quality-price report, Romania has ceased to be an attractive tourist market (see the worst indicators giving Romania a competitive disadvantage as a tourist destination)-see Figure 1.

The worst indicators	Score on the competitive disadvantage
Quality of roads	2.59
Sustainability of the development of the tourism industry	2.57
The effectiveness of the marketing and brand building	2.43
Tourism rank among the priorities of government	2.41
The enlargement and the effect of taxation	2.12
The transparency of the government policy	2.10
The access to improved drinking water	1.87
The tourism opening	1.86

Fig. 1 Romania: the most important development disadvantages in tourism

(Source: Eurostat, Panorama on Tourism, 2008)

The main causes due to which, compared to other Central and Eastern European countries, Romania modestly presents itself related to the economic performance of the tourism industry:

- lack of a coherent and stable action plan regarding the tourism development and
- lack of investment funds for the general and specific development, rehabilitation and change of the infrastructure, because of the slow and complicated process of privatization, of inappropriate taxation,
- lack of bank loans facilities

However, the tourism sector reform has started later, even if some economic reform attempts have been made since the early '90s, but the duration of their application has been extended on a very large period of time.

However, more researches show that the future of European tourism will focus on the quality of tourist experience - in the sense that they will realize that the

destinations which will give increased attention to the environment, employees and local communities, are the most likely to show more care for tourists.

Integrating sustainability concerns into their activities, the stakeholders in tourism will protect the competitive advantages that make Europe the most attractive tourist destination in the world - will protect its intrinsic diversity and variety of landscapes and cultures. Also addressing sustainability concerns in a socially responsible manner, the tourism industry will be able to provide innovative products and services, quality and added value.

As part of the European Union, Romania, volens-nolens, is subjected to approach certain principles in the development of tourism to register itself on the route of competitiveness and sustainability.

The principles for achieving a competitive and sustainable Romanian tourism should be just those highlighted by the European Commission, which calls on all actors to respect the following principles:

- **A holistic and integrated approach** - the planning and tourism development should take account all the impacts tourism has. Furthermore, tourism should be well balanced and integrated in the range of activities that have an impact on society and environment.

- **Long term planning** - Sustainable development refers to the protection of the needs of future generations and this generation. Long term planning requires the ability to sustain actions over time.

- **Finding an appropriate pace for development** - The level, pace and form of development should reflect and respect the character, the resources and the needs of host communities and destinations.

- **Involving all stakeholders** - A sustainable approach requires widespread and committed participation in decision making and implementation by all parties concerned by the results, including a real financial support (see Fig.2).

- **Use of the best knowledge available** - Policies and actions should be developed based on the latest and best knowledge available. Throughout Europe, the information on tourism trends and impacts, on skills and experiences should be shared.

- **Risk reduction and management** (precautionary principle) - If there is uncertainty about outcomes, a full evaluation should be performed and then the preventive measures should be taken to avoid damage to the environment or society.

- **Passing effects on costs** (the user and polluter pay) - the prices should reflect the real costs to society generated by the consumption and the

production activities. This has implications not only on pollution, but also on the use of the equipment that generates significant costs of management.

- o **Set and respect limits, where appropriate** - the limited capacity of individual sites and regions should be recognized, and where appropriate, the will and the capacity to limit the tourism development and the number of tourists should exist.

- o **Undertake continuous monitoring** - Sustainability is about understanding impacts and being alert to them, so that the necessary changes and improvements should be fulfilled.

In the digital economy, in which the client is the "boss" and the attitude of travel agencies is entirely directed towards it, the recovery of the value of the destination Romania should be focused on finding those elements of the conceptual development leading to the satisfaction of the consumer, respectively to the enthusiasm, so that, beyond the stage of 'attraction' of the consumer, to ensure not only the preservation, but also the strength of his loyalty.

However, unfortunately the damage done by the bad image of Gypsies will not be deleted for a long time. The aggressive begging, the theft could have been quickly countered by the broadcast, at the expense of the Romanian State, on the foreign television channels of Gypsy palaces built with money obtained by public mercy and by applying the western principles on a minority at that time unable to understand them. Moreover, even for the built palaces "from honest work, the sale of scrap ... (!?)" verification was required not only for the manner in which they had got the scrap, but also for the possible complicity of those who had accepted to collect and reevaluate it. In parallel, the legal situations should have been clearly marked, not to condemn the ethnicity, but only the individuals whose actions have negative effects on the whole people. The scale of the phenomenon has all the features of a media event, particularly effective, as it may be established empirically by anyone, having a very harmful effect on the tourist promotion of Romania.

"I have begun to study tourism from a new perspective: as a means of mass communication (media). The field is, as shown at a first glance, huge and theoretical research in the field does not exist.

But the history of tourism after World War II shows that there were, in many countries, well outlined guidelines for the purposes stated. The collapse of the "wall" and the recent years show the need for a theoretical system and a practice in using this tool, in the construction or destruction of social movements by persuasion, self-suggestion and incentive through tourism." (Globalization and Tourism, the case of Romania, Ilie Rotariu, Ed.Continent, Sibiu, 2004).

Naturally, the economic value of tourism can not be debated, perhaps, as we have said before, it is overbid. But tourism is a "distribution" of knowledge about a region, a community, raising the quality of tourist experience, but also a perpetual metamorphosis of its components that complement the identity in time and space.

If besides the conditions of economic uncertainty of the major economies of the EU the prospects of terrorist attacks or the reactivation of the old conflicts in the Balkans (Kosovo) are added, it is more than likely that we will assist at a constant preservation or even decrease of the tourism demand in Europe. Given that all countries in the region (Bulgaria, Hungary, Romania, Turkey, and Greece) want an increase in international-receiver flows, each will show a strong competition, and Romania can be disadvantaged because of the tourism policy manifested at the moment.

Globalization can bring, in turn, besides the positive effects of the enhanced investments, the increasing employment, negative effects as well. The latter will be felt especially in the cultural field by damage, for the sake of higher profits, of the customs and of the traditional lifestyle. Thus, traditional dishes will be attuned to tourists' tastes, customs and folk traditions will be in danger of becoming synonymous with Kitsch and cultural values of people will change after the dominant cultural values, at the moment from the American culture.

Under the conditions of the economic life globalisation, all the aspects regarding the social responsibility and the ethical problems become extremely important preoccupations of the tourist companies, especially from the perspective of the sustainable development, itself affected by the globalisation metamorphoses, undergoing a process of inter-conditioning. (fig.2)

Fig. 2. Tourism interrelation with other areas



The new world context imposes on the parties involved in the tourist sector the approach of new interdisciplinary concepts, doctrines, managerial principles or even tricks in order to focus the stakeholders on the ethical-responsible component.

The good development of the tourist activity depends on the degree of involvement and the interests of the different groups of stakeholders.

The design of sustainable strategies which can take into account the stakeholders represent a competitive advantage for the tourist units. The main groups of stakeholders, intensely involved in the social and economic activities, are represented by the managers, clients, suppliers, competitors, employees, unions, bodies of the central and local administration, respectively the city halls, the financial administrations etc. (Nicolescu and Verboncu, 1999)

For the purpose of the solution of the problems referring to the social responsibility and the ethical behaviour, the tourist companies shall have to initiate and maintain a permanent dialogue with their own personnel, with the clients and the governmental bodies, determining thus the confidence of the clients and the facilitation of the consolidation of the connections between the unit and the external environment.

The vocation of the company represents for the tourism operators the strong point of diffusion of internal government principles, the general expression of the reason to exist, the social policy – the responsibility to the employees and the consumption in its ensemble, shaping the evolution direction of the organisation according to the natural expectations of the stakeholders.

It is considered that the responsibility of the company, regardless of the legal obligations or the economic and normative constraints imposed by the European Union directives, is to supervise the achievement of some objectives for the community.

The concept of social responsibility refers to the ethical and legal behaviour at the working place, on the market or in the community. The special appreciation of the employees and the respect for the community represent the essence of the HR notion. The constant positive contribution to the society may bring direct benefits in time, ensuring the competitiveness on a long term. However, most of the times, the social involvement in Romania is associated to a source of profit for the organisation.

The companies, especially the ones with a tourist profile, must take into account, along the development of activities, the application of requirements imposed on by the unwritten laws of common sense doubled by the respect for the nature and humanity (Popa and Filip, 1999):

- To act in order to respect the basic values;
- To follow the obvious moral rules;
- To conclude contracts in good faith and in everyone's benefit;
- To offer profitable conditions to the less favoured social categories;
- To comply with the ethical norms when they decide long and medium term objectives;
- To give each interested party what is necessary.

We still need a lot of years until achieving Recognition, Reputation and Gratitude, the three important coordinates which guide the occidental business world, where the social responsibility is understood and risen to company policy rank.

Under the current conditions, the survival of the tourist companies is more based on instinct and on the ability to anticipate the new attributes required by the tourist market. But the competitive advantage accompanied by the profit achievement does not often allow the assumed decisions to be in favour of the social/environment.

Especially these variable aspects are analysed by ethics. At the level of the tourism operators, all sorts of ethical dilemmas (Țigu, 2003) appear, like:

- Is it normal that the older employees have higher salaries than the young people?
- Is it normal to fire the old employees at a certain point?
- Is the premeditated "omission" of tourist information regarding the free of charge services justified?
- Is it normal to turn to the indirect advertising?
- Are we excused if we pollute nature as long as we do not have access to utilities?
- Is it fair to minimise the hygiene conditions inside the kitchen?
- Is it ethical to refuse the personnel employment of a certain sexual orientation, religious belief or a certain ethnicity?
- Is it normal to offer/receive bribe etc.?

The law does not always help in such situations; at least it can offer a minimum level of moral standards (Țigu, 2003), which are informational for the managerial decision. But what happens beyond the law? The solution of these inconsistencies depends most of the times on the personality of the one responsible with taking such decisions.

Another question resides in the fact that the social responsibility projects are decided and mainly coordinated at the level of the large and medium sized hotel units by the managers and not by the owners of the companies. Is it really ethical to make philanthropic gestures on somebody else's money? The role of the managers is to administer the company's money, but we must take into account the

related to the cultural values, customs, traditions and specific holidays.

Thus, the great diversity of tourist consumption components led to the need to develop comparing value indicators of this specific consumption of goods and services. Thus, researchers use the so-called "**tourist basket**", which expresses the total value of services and goods (services) consumed by an average tourist during a holiday (day of stay, average stay etc.) at a tourist destination.

For example, the rural areas invest in tourism to diversify their economies, necessary for their growth, employment and sustainable development. They offer real opportunities as attractive places in which to live and work, whether as a reservoir of natural resources or as valuable landscapes.

In this context, EU policies need to ensure coherence and synergies between them, the preservation of the natural environment and the protection of the rural areas.

Tourism can also contribute to the sustainable development of urban areas by improving business competitiveness, social needs satisfaction and by preserving the cultural and natural environment.

To be successful in all areas, urban destinations have to adopt a global approach based on sustainable development principles which should be acknowledged and supported by public policies at all levels, including at a European level.

The imperative changes that must be reflected in the policies of the tourism industry post-economic crisis are:

- **The focus should move on the general economic development, rather than** on uncoordinated and inconsistent measures targeted for tourism industry

- **Promoting a tourist oriented policy**, instead of the priority given to tour operators and - to a lesser extent - to the local tourist accommodation industry

- **Improving communication through smarter actions to create brand and advertising**

- **Networking industry by excellence, Romanian tourism has even more potential than other areas of the economy of a country.**

- **Tourism has been defined as a system in which the interdependence is essential and the cooperation among various organizations in a tourist destination creates the tourist product.**

- **Under the impact of globalization**, the development of tourism in each country in the world is possible only if an optimal public-private partnership exists;

- **There is not a real public-private partnership** in this sector and the competent

institutions creating a specific education and a conduct to support a sustainable development of Romanian tourism do not make the necessary efforts;

Basically, in this context of the crisis, Romanian tourism needs to maintain the accommodation capacities and has to improve the services. The real benefits will be obtained later.

The effects of global financial and economic crisis are felt by all the market players, including the European one, regardless of their domain.

Tourism is a major economic activity with a broadly positive impact on economic growth and employment in Europe. It is also an increasingly important aspect in the life of European citizens, more and more of whom are travelling, either for leisure or business. As an activity which impinges on cultural and natural heritage and on traditions and contemporary cultures in the European Union, tourism provides a textbook example of the need to reconcile economic growth and sustainable development, including an ethical dimension. Tourism is also an important instrument for reinforcing Europe's image in the world, projecting our values and promoting the attractions of the European model, which is the result of centuries of cultural exchanges, linguistic diversity and creativity.²

European tourism has recently experienced a difficult economic situation, aggravated by the eruption of the Eyjafjöll volcano, which has demonstrated both its vulnerability and its resilience, thanks to the importance Europeans attach to travel and holidays. Thus the economic and financial crisis, which has affected all economies since 2008, has had a considerable effect on demand for tourist services. More recently, the interruption of air traffic during April and May 2010 due to the presence of volcanic ash clouds had a major effect on travel in Europe, causing significant disruption to airlines, travel agencies and tour operators as well as tourists themselves.

This difficult background for the tourism industry has highlighted a number of challenges which the European tourism sector must face. In order to respond, it is essential that all operators in the sector combine their efforts and work within a consolidated political framework that takes account of the new EU priorities set out in the 'Europe 2020'

² Europe, the world's No 1 tourist destination – a new political framework for tourism in Europe, Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, p 2.

http://ec.europa.eu/enterprise/sectors/tourism/files/communications/communication2010_en.pdf

strategy: Europe must remain the world's No 1 destination, able to capitalise on its territorial wealth and diversity.

With this communication, the European Commission intends to encourage a coordinated approach for initiatives linked to tourism and define a new framework for action to increase its competitiveness and its capacity for sustainable growth. It therefore proposes a number of European or multinational initiatives aimed at achieving these objectives, drawing in full on the Union's competence in the field of tourism as introduced by the Lisbon Treaty.

In addition, the European Union remains the world's No 1 tourist destination, with 370 million international tourist arrivals in 2008, or 40 % of arrivals around the world,⁴ 7.6 million of them from the BRIC countries (Brazil, Russia, India and China), a significant increase over the 4.2 million in 2004. These arrivals generated revenues of around EUR 266 billion, 75 billion of which was from tourists coming from outside the Union.⁵ As regards journeys by Europeans themselves, they are estimated at approximately 1.4 billion, some 90 % of which were within the EU. According to estimates by the World Tourism Organisation (WTO), international tourist arrivals in Europe should increase significantly in the coming years. Finally, European tourists are one of the largest groups travelling to third countries, providing an extremely important source of revenue in many countries. These elements justify providing more detail of the external dimension of EU tourism policy, in order to maintain tourist flows from third countries but also to support EU partners, particularly in the Mediterranean.³

Over the years, the European Union has been able to lay the foundations for a European tourism policy, stressing those factors which determine its competitiveness while taking account of the need for sustainable development. With the entry into force of the Lisbon Treaty, the importance of tourism is recognized; the European Union now has powers in this field to support, coordinate and complement action by the Member States. It is a step forward which provides the necessary clarification and enables the setting up of a coherent framework for action.

³ Idem 1, p3 and Eurostat, Statistics in Focus, 23/2009 (Balance of payments statistics), Communications from the Commission: Agenda for a sustainable and competitive European tourism (COM(2007)621 final); A renewed EU Tourism Policy - Towards a stronger partnership for European Tourism (COM(2006)134 final).

International monetary policy, in early 2009, will reach especially the "engine" sectors of the economy, including tourism. In this respect, I believe that the specialized consultancy services for the European funds absorption will be affected on the one hand by the impossibility of the beneficiaries of funds to secure the projects co-finance of the loans attracted, on the other hand the volume of EU funds, allocated under the n+2 rule, will be reduced in the next years.

4 Conclusion

We believe that 2010 will be full of events in the economic-financial sector and a better professional settlement of the Romanian companies, under restricted conditions created by the economic crisis, will lead to the stability of our services. Given the specific Romanian optimism, we believe that we will overcome this global obstacle as well.

Over time, tourism has been seen as geographically dispersed, often in remote areas from the source markets, consisting of small independent business with a high fluctuation of the staff operating in a turbulent business environment, however, the survival of the operators largely depends on the collective action, on their cooperation.

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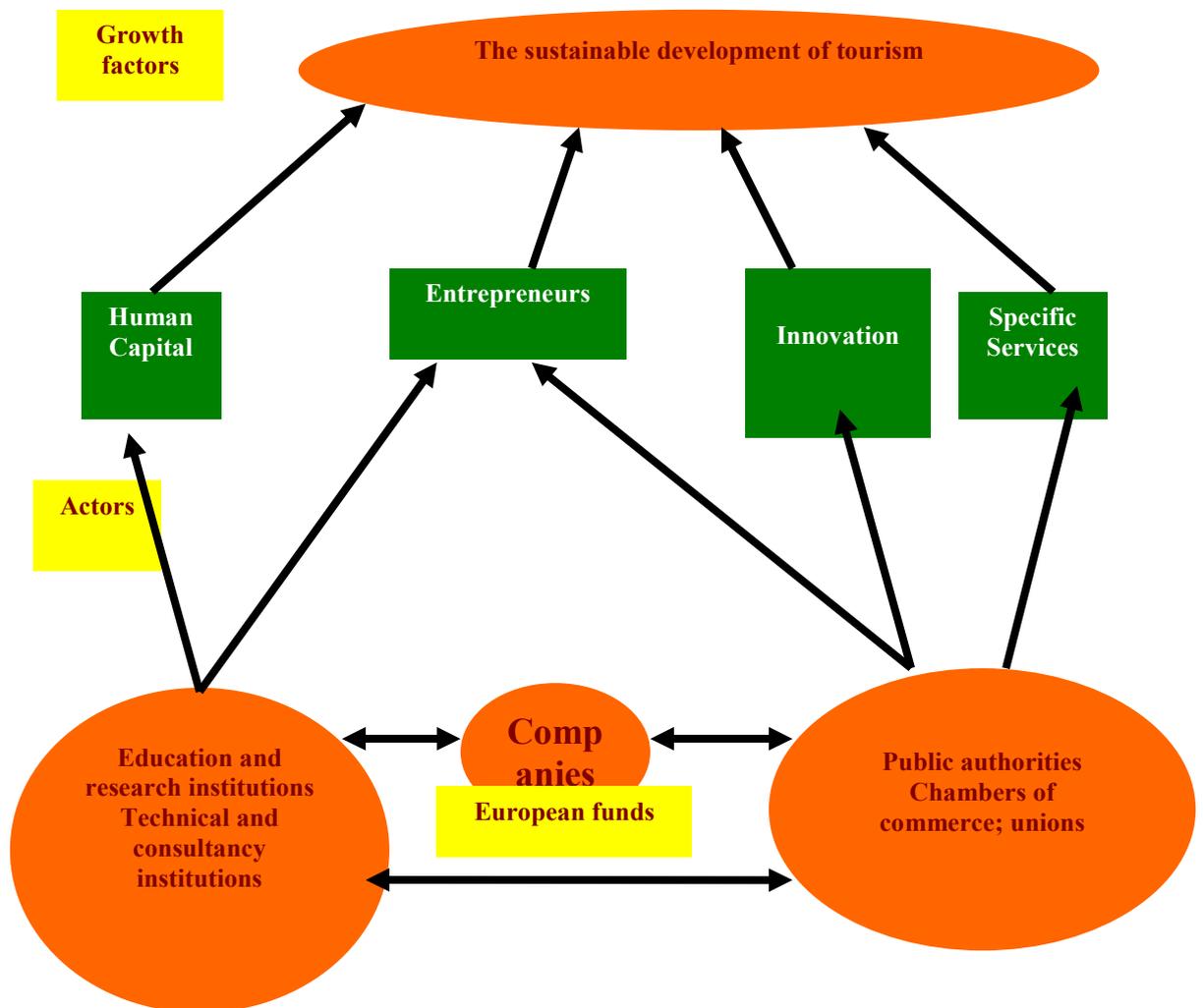


Fig. 4 Stakeholders' involvement in the sustainable development of tourism