



DRAFT

ROMANIA

NATIONAL TOURISM DEVELOPMENT

MASTER PLAN

2007 - 2026

EXECUTIVE SUMMARY

PREPARED BY



National Tourism Development Master Plan – Executive Summary

DRAFT

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NATIONAL TOURISM DEVELOPMENT MASTER PLAN

1. Preamble

This document is an Executive Summary of the National Tourism Development Master Plan for Romania. This concise version is intended to encapsulate the complex range of issues addressed in the full Plan and enable a rapid appreciation of the challenges and strategic directions recommended. It should not be taken in isolation, but read in conjunction with the full Plan and its annexes.

The Action Plan is the complete Master Plan Action Plan.

2. Introduction

This Master Plan has been elaborated by a team of World Tourism Organisation experts in conjunction with Romanian counterparts on behalf of the Government of Romania. It seeks to embrace the principles of sustainable tourism development as defined by the World Tourism Organisation, namely, "Sustainable tourism development meets the needs of present tourists and host regions while protecting and enhancing opportunities for the future. It is envisaged as leading to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems".

3. Objective

The objective of this tourism development master plan is to identify the weaknesses in the Romanian tourism industry and provide strategic directions as to how it can be restructured, resourced and regenerated in order to compete effectively in the global marketplace. The plan addresses the grassroots deficiencies of weak and unintegrated physical planning; the ineffective coordination and leadership provided by the public sector; the outdated processes for human resource development; the lack of a robust statistical basis for analysis, planning and marketing purposes; and an outmoded approach to destination marketing. All of these areas must be addressed if the industry is to be given a firm foundation on which to develop and progress.

Specific recommendations are made in the Action Plan as to how these deficiencies can be eradicated. The availability of EU Structural Funds until 2013, as well as the assistance of other donor organisations, offers a unique opportunity and resource to facilitate the implementation of these recommendations.

4. The Importance of Tourism for the Romanian Economy

There were 6,037,000 foreign visitors to Romania in 2006. This includes day visitors as well as tourists staying at least one night in the country.

Foreign Visitors to Romania – 2006

Origin	Visits
EU	2,803,000
Non-EU Europe	2,886,000
North America	164,000
Israel	62,000
Japan	14,000
Rest of World	108,000
Total	6,037,000

Source: National Institute of Statistics

Tourists – both foreign and domestic – spent 19,630,000 nights in registered accommodation in 2006.

Total expenditure in 2006 by foreign and domestic tourists is estimated at Euros 2,955 million.

It is estimated that foreign visitor expenditure was 1.1% of GDP and tourism as a whole was 3.5% of GDP.

151,000 people were employed in the hotels and restaurants sector alone in 2005. This represented 1.6% of the workforce. Significant additional employment is generated by tourism in other sectors such as transport, entertainment and services.

5. What Romania Offers Now

Natural Resources

The country has a wealth and diversity of natural resources, which form much of the "raw product" of tourism. This includes the Black Sea coast, the Danube and other river systems, the Carpathian and other mountain ranges and the Danube Delta Biosphere Reserve. There are 13 National Parks and 13 Natural Reserves encompassing 7% of the country's surface.

There is a great biodiversity with many species of flora and fauna unique to Europe. Romania has the greatest range of large mammals in Europe and is a major bird migration route.

Romania remains largely an agricultural country with numerous villages and attractive countryside offering excellent opportunities for rural tourism.

A third of Europe's natural springs are in Romania. There are 117 localities with identified therapeutic factors – water, muds, gases, etc. – which form the basis for the country's numerous spas. There are 29 spa resorts designated as of national importance and a further 32 of local importance. These are a major resource for health and beauty tourism as well as medical treatments.

The Romanian coast stretches 245 kilometres from the Danube Delta in the north to the Bulgarian border and features long stretches of beach with major tourist

resorts and ports. Over half of the country's accommodation stock is on the coast.

Cultural Heritage

The religious built heritage is a particular strength. There are 30 UNESCO World Heritage Sites including the wooden churches of Maramures, the painted monasteries of Moldavia and the Dacian fortresses in the Orastie Mountains.

There is a network of towns featuring a wealth of architectural monuments with several well preserved historic town centres.

There are over 6,600 monuments of national significance and over 670 museums.

There is a vibrant folk culture and numerous traditional events and festivals.

The performing arts are strong and of international standard. There are 146 major venues staging well over 17,000 performances annually.

Transport

The road network is extensive, but in the main below European standards. Planned infrastructure improvement projects should largely resolve this deficiency by 2015.

The rail network is one of the most extensive in Europe. Much of the rolling stock requires modernisation and electrification of more lines is required.

There is an extensive network of regional airports, many with international scheduled as well as charter services. Bucharest has two airports and direct connections and frequent services to most European and regional capitals.

There is increasing cruise traffic on the Danube and sea-going cruise ships visiting Black Sea harbours.

Accommodation

In 2006 there were 4,710 accommodation units offering 281,000 bedspaces. 70% of accommodation units are, however, 2 star or lower. There has been an increase in the numbers of city hotels and particularly rural and urban guest houses in recent years.

A high percentage of accommodation is on the coast, which has a short season.

Accommodation Units and Bedspaces by Location

Location	Accommodation Units	% Accommodation Units	Bedspaces	% Bedspaces
Seaside	1,497	42	160,214	56
Spa	369	10	39,090	14
Mountain	828	23	33,196	12
Delta	122	3	3,806	1
Cities	745	21	51,734	18

Source: National Institute of Statistics

Seaside accommodation has the shortest operational season, open less than three months on average. Danube Delta accommodation also operates for less than six months of the year on average. Occupancy levels during operational periods are not high.

Accommodation Average Annual Occupancy during Operational Periods

Location	% Occupancy
Seaside	45
Spa	53
Mountain	22
Delta	27
Cities	31

Source: National Institute of Statistics

The supply of lower quality accommodation far exceeds demand. There is demand for more higher quality accommodation.

Human Resources

There were 151,000 employees in the hotel and restaurant sector in 2005.

There are 2,822 registered travel agencies, 2,638 of which are also licensed to operate as tour operators. Staff numbers are not known.

There are 937 licensed tour guides.

6. Vision

The Vision of the tourism industry is to establish Romania as a quality tourism destination based on its natural and cultural heritage which matches EU standards of product and service delivery by 2013 and to generate environmentally sustainable growth in tourism at a rate in excess of other European destinations.

7. Strengths and Weaknesses

The Strengths of Romania as a Tourist Destination are:

Geographic and Environmental

- Danube Delta's biodiversity (UNESCO World Heritage Site)

- Diversity of National Parks and Reserves - 7% of the country – with pristine forest, lakes and rivers
- Rich and varied countryside with picturesque villages
- Black Sea coast and beaches
- Carpathian Mountains
- The River Danube and extensive river network throughout the country
- Extensive cave networks
- Rich diversity of flora and fauna, many unique or most populous in Europe, especially large carnivores
- 35% of Europe's natural springs and "mofeta" providing wide range of spa treatments
- Temperate continental climate
- Good natural conditions for tourism activities – skiing, hiking, riding, cycling, mountaineering, watersports, etc,

Culture and Heritage

- Diversity of heritage sites – monasteries, archaeological sites, fortified villages etc. including 6 UNESCO World Heritage sites/areas
- Medieval towns
- Rural villages featuring traditional way of life and festivals
- Museums – diverse themes
- World class performing arts - both classical and modern
- Wide range of traditional and folklore Festivals
- Legends – Dracula etc.
- Sibiu – Cultural Capital of Europe 2007

Infrastructure, Transport and Communications

- Good network of airports
- Extensive rail network – fourth largest in Europe
- Extensive road network with many border crossing points
- National air carrier with good network of destinations and many other carriers
- Good quality intercity coach services and other tour operator transport
- Well developed network of river harbours
- Well developed telecommunications networks – telephone, radio, GSM, satellite
- Electrical power supply in 95% of country
- Significant private sector investment in new accommodation

Human Resources

- Country of welcoming people and a tradition of hospitality
- Young population with linguistic skills providing many potential tourism employees
- Well developed networks of high schools and universities as a basis for tourism education and training
- National Centre for Tourism Education established and overseeing hospitality industry training
- Tourism courses offered at many tertiary education institutions
- Nucleus of skilled and experienced destination management organisations

Legal Framework and Organisation

- Tourism product and supplier licensing system operational

- Extensive legal framework controlling National Parks, Protected Areas, the environment and the cultural heritage
- Government recognition of tourism through the National Development Plan and National Tourism Authority
- Liberal visa regime

Marketing and Promotion

- Active tour operator sector
- National Institute for Tourism Research and Statistics (INCDT)
- Network of NTA promotional offices abroad
- Extensive promotional programme of activity abroad – advertising, fairs, media and operator visits
- Existing brands – Dracula and Transylvania

Other

- Increasing interest in tourism development among foreign investors

The Weaknesses of Romania as a tourist destination are:

Geographic and Environmental

- Industrial pollution
- Unsightly and polluted industrial ruins
- Major litter problem; insufficient waste collection and disposal facilities
- Pollution of the Danube, Black Sea and rivers
- Beach erosion and pollution
- Low altitude of many ski resorts limits the length of the season
- Poor implementation of environmental law
- Excessive density of tourism developments in some areas
- Unsustainable use of forest areas
- Unsustainable exploitation of natural resources even in protected area

Culture and Heritage

- Decay of many historic buildings and monuments
- Conservation and architectural preservation legislation not implemented
- Presentation and interpretation of museum exhibits generally poor
- Lack of public investment in the development and promotion of cultural attractions – museums, monuments, etc.
- No database of festivals and cultural events available to permit effective promotion to visitors
- Lack of support for local traditions and folklore

Infrastructure, Transport and Communications

- Poor ground facilities at regional airports and railway stations
- Some airport runways are too short to attract additional and international services extensions required to encourage regional gateways and spread of tourism
- Low quality of many trains and local buses
- Poor road quality
- Lack of motorways and incomplete trans-European roads
- Lack of ring roads around heritage towns
- Few river transport services

- Lack of signage to tourism sites and facilities - international brown tourism signs
- Insufficient electrification of rail network
- Limited provision of access for the disabled at many hotels and attractions
- Lack of sewerage and water supply especially in rural areas
- Low use of renewable energy sources
- Low standard of much accommodation
- Camping facilities often poor
- Old equipment in many spas
- Lack of parking and toilets at many tourist attractions
- Inconvenient domestic air links and schedules
- Uncoordinated ground transport between towns and airports
- No purpose-built international conference centre

Human Resources

- Low awareness of tourism's economic importance
- No Hotel School
- Low rates of pay and poor working conditions stimulating exodus of hospitality industry workers
- Vocational training in hospitality sector does not correspond well with employers' needs
- Lack of vocational training courses in the regions
- Emigration of hospitality workers
- Little education in schools on environmental protection and tourism
- Low awareness of career paths and potential within the tourism industry
- Limited skills in use of IT by tourism SMEs

Legal Framework and Organisation

- Implementation of tourism product and supplier registration system under resourced
- Licensing regulations do not meet current market conditions
- Lack of regional tourism development strategies
- Lack of integrated town/resort tourism development plans
- Lack of incentives and support mechanisms for investors
- Unresolved land and property ownership issues restricting development
- Inter-governmental consultation prior to new legislation is poor
- Implementation of current legislation often inadequate
- Right of way on designated trails needs to be established
- Lack of coordination between local, regional and national public authorities for the development of tourism
- No structure for public / private sector collaboration

Marketing and Promotion

- Lack of strong, positive image abroad for destination Romania
- Lack of formal destination marketing planning at national level
- Insufficient market research
- NTA offices abroad have limited impact due mainly to low staff levels
- Uncoordinated network of Tourist Information Centres in Romania providing varied service levels
- Insufficient use of IT and the Internet for information, marketing and reservations

- Limited private/public sector collaboration in marketing

Other

- Short seasons for coastal and winter sports resorts

8. Goals

- To establish a heightened awareness both domestically and internationally of Romania's positive appeals as a tourist destination and its tourism brand image;
- To ensure that tourism is developed in a sustainable manner so that the environmental, cultural and heritage appeals are both appreciated today and preserved for future generations;
- To ensure tourism is recognised as a key sector within the economy and as a generator of an increasing number of jobs;
- To create an awareness among the population of Romania of the tourism appeals of the country and a desire to share these with visitors;
- To restructure the NTA as an efficient and effective national tourism organisation, marketing the tourism products and services of Romania, ensuring quality product and service standards, providing information to visitors and supporting all sectors of the country's tourism industry in the development of tourism;
- To develop and implement annual collaborative public/private sector destination marketing plans targetting all major markets with potential for Romania
- To offer coordinated support mechanisms to regional and local tourism organisations in the development of area tourism policy, strategies and plans;
- To expand the system for the regular collection, analysis and dissemination of tourism statistics and research to assist in the creation of a Tourism Satellite Account for Romania and facilitating investment and marketing decision-making;
- To establish a network of coordinated tourist information centres in all main tourist areas in order to extend a warm welcome to visitors, providing appropriate information to assist in their orientation, enjoyment and appreciation of the destination;
- To develop a nationwide database of tourism products, facilities, events and services with both tourism industry and public access;
- To upgrade and expand the role of the national tourism website as a major promotional, information, reservations and e-marketing tool;
- To develop a refined system of product and service classification and grading to ensure the provision of quality products and services to meet visitor needs and expectations;
- To introduce mechanisms and incentives to facilitate investment in tourism by both Romanian and foreign investors;
- To consolidate the legal framework for tourism so that it will ensure good practice and guarantee high standards without undue bureaucracy;
- To encourage town, county and regional authorities to develop integrated tourism development plans including all infrastructure elements to avoid uncoordinated and incompatible development;
- To develop the provision of pre-vocational and vocational training for the hospitality sector so that curricula evolve to meet changing market needs and sufficient staff are qualified to meet employment demand / fill employment vacancies;

- To facilitate the development of a national convention centre enabling the capital and country to compete for international meetings;
- To develop Romania's spa resorts to offer the range of treatments, facilities and services demanded by a rapidly changing customer base;
- To develop mountain areas and resorts to offer year round facilities and attractions for visitors;
- To identify season lengthening development opportunities for Black Sea coastal resorts and facilitate their introduction;
- To ensure the requirements of tourists are given prominence in the development of the national transport system including road and rail networks, airport and harbour infrastructure;
- To expand the national tourism signage system in conformity with EU standards and introduce themed tourism routes;
- To assist the development of ecotourism in the Danube Delta, national parks and reserves and rural areas legislation;
- To train and assist major national museums and monuments in improving their visitor facilities, especially welcome and interpretation and marketing, as an example to all such monuments.
- The creation of a national cultural events database to facilitate the promotion of visual and performing arts, and particularly traditional festival and folklore events;
- To establish cooperative and collaborative frameworks within and between public and private sectors.
- To develop an effective Implementation Strategy to ensure the Master Plan goals are realised.

9. Targets – the Potential

Provided the structural, product, service and marketing improvements recommended in this plan are implemented, foreign visitor arrivals are targeted to increase two and a half times by 2026 to 15.485 million.

Foreign Arrivals Targets, by Source/Country/ies, 2006-2026

Origin	2006 ('000)	2011 ('000)	2016 ('000)	2021 ('000)	2026 ('000)
EU	2,803	3,777	4,990	6,569	8,642
Non-EU Europe	2,886	3,428	4,022	4,663	5,340
North America	164	235	337	484	695
Israel	62	89	128	184	263
Japan	14	23	37	60	86
Rest of World	108	155	222	319	459
Total	6,037	7,707	9,736	12,279	15,485

Source: Master Plan estimates based on Arrivals data

Foreign visitor expenditure is targeted to increase by over eight times by 2006 to around Euro 7.7 billion. Domestic tourism expenditure is targeted to increase by nearly four and a half times to Euro 8.3 billion over the same period.

Visitor Expenditure Targets 2006-2026

Year	International Visitor Expenditure (Euros million)	Domestic Visitor Expenditure (Euros million)	Total Visitor Expenditure (Euros million)
2005	877	1,878	2,755
2011	1,726	2,385	4,561
2016	2,947	4,058	7,005
2021	4,798	5,914	10,712
2026	7,740	8,329	16,069

Source: Master Plan estimates based on Arrivals data

The total contribution to Romania's GDP is targeted to increase to 6.9% by 2026.

Estimated Total Tourism Earnings as a Percentage of GDP in Billion Euros

	2005	2011	2016	2021	2026
Romanian GDP (Billion Euros)	79.3	106.1	142.0	181.3	231.3
Total Tourism Earnings (Billion Euros)	2.755	4.561	7.005	10.712	16.069
Earnings as a Percentage of GDP	3.5	4.3	4.9	5.9	6.9

Source: National Bank of Romania, Ministry of Public Finance and Master Plan Estimates

10. Strategic Directions / Initiatives

10.1 Structural Arrangements and Responsibilities for the Coordination of the Tourism Industry

The Government role in Tourism is to provide leadership for the total industry as an economic force in the nation. It will intervene only where the industry itself is unable to act effectively. Specifically the Government roles are to:

- Formulate medium to long-term tourism policy, plan for tourism development, and regulate tourism activities through the provision of requisite legislation.
- Co-ordinate the actions of other Government Ministries and Agencies impacting on tourism development
- Facilitate tourism development by providing the economic, infrastructure, regulatory and fiscal environment that encourages investment and orderly growth.
- Ensure training and education facilities are in place to provide a skilled workforce for the industry.
- Ensure the projection and maintenance of a positive image of Romania internationally as a tourism destination.

The Ministry with responsibility for tourism will:

- Formulate and elaborate medium to long term tourism policy and plans
- Secure adequate funding and resources for tourism

- Advise on the allocation of infrastructural and other resources that will have a positive impact on tourism
- Monitor performance of Ministries and agencies in implementing tourism quality and safety standards and achieving targets.
- Co-ordinate bilateral and multilateral relations in tourism with international organizations, funding and donor agencies
- Undertake research and make inputs to general policy and planning
- Establish and fund a semi-autonomous National Tourism Organisation (NTO) to implement Government tourism policy in conjunction with the industry
- Monitor and evaluate performance of the industry and the NTO
- Drive the implementation of this National Tourism Master Plan

The National Tourism Organisation will be constituted as a semi-autonomous body under the chairmanship of the State Secretary appointed by the Minister with responsibility for tourism with the brand name "Romania Tourism". It will have a Chief Executive Officer reporting to a Board comprising representatives of the tourism industry and public sector under the chairmanship of the State Secretary.

As the main vehicle for the implementation of the Ministry's tourism policy the role of the National Tourism Organisation is to encourage and promote the development of tourism to and within Romania. This will be achieved through the formulation and implementation of short to medium term policies, strategies and plans. The functions of the NTO will include the following:

- The marketing of Romania as a tourist destination domestically and internationally
- The provision of tourist information services to visitors and their intermediaries before and during their visits
- The development of high standards of tourism facilities, amenities and services and monitoring quality and safety through the application of licensing and classification regulations and other measures
- Assistance to the industry in the development of marketing skills and initiatives
- The establishment of a Human Resources Development Advisory Committee to coordinate the provision of human resource education and training in tourism
- Promotion of the development of tourism products, services and facilities that have potential to attract tourists
- The generation of an increased awareness in Romania on the benefits of tourism through awareness and education programs
- The administration of annual budgets

The main roles of County Councils and local administrations in tourism are set out in Ordinance No. 58 of 1998, Article 20. In addition their roles shall be to:

- Identify, preserve, protect and develop tourism assets and resources within the county/area;
- Promote and market their county/area as a tourist destination to the domestic and where appropriate to the regional markets;
- Provide information services to visitors and residents in accordance with the guidelines established by the NTO;
- Generating positive attitudes to tourism, promulgating the benefits of well managed tourism activities;

- Undertake research and data collection to contribute to national surveys commissioned by the NTO;
- Make recommendations to the NTO on actions to benefit tourism.

10.2 Planning and Physical Infrastructure

Access and Infrastructure

At a strategic level road, rail and air transport linkages are being upgraded, primarily with EU funding. This programme will continue through the period of structural funding and as a consequence no strategic transport problems should limit tourism development in Romania. Similarly service infrastructure, including water supply, sewage, waste disposal, electrical supply and telecoms are being upgraded to European standards and will be adequate to support tourism growth at a strategic level.

More locally access and service infrastructure is often found to be lacking due primarily to poor planning and coordination. It is recommended that at regional, county and city levels of government Tourism Infrastructure Committees be established to identify requirements and ensure the timely provision of infrastructure to tourism development areas and sites.

Environmental conditions in tourist areas and require to be addressed urgently. It is recommended that a number of actions be taken with the general public to raise awareness of environmental issues. In addition specific measures are recommended to reduce pollution and to incorporate environmental parameters into NTO-issued operating licences and grading assessments.

Planning

The planning of tourism development in Romania is fragmented and uncoordinated. The following problems arise frequently:

- Informal Development – often around prime tourist attractions, such as Bran Castle or Mamaia beach, in the form of low quality developments such as market stalls, catering outlets and discothèques.
- Over-development – excessive development in sensitive areas such as seaside resorts and even some villages, which exceed the carrying capacity of the destination resulting in its degradation.
- Poor Design Standards – many examples of developments not in tune with the architectural style of the locality.
- Poor Support Infrastructure - including capacity constraints on local access roads, insufficient vehicle parking, and visitor facilities such as toilets, information centres and signage.

A clear planning framework hierarchy has been established by government to provide strategic guidance to the national development process. It is clear that the present process, although covered by extensive legislation, is failing to respond to the needs of tourism and its future development.

There are three levels of spatial planning in Romania:

- national,

- regional or county level, and
- local or urban level.

The apex of the system is the National Plan (PATN) the main framework of which has been prepared and passed into law by Parliament. The detailed tourism section of the plan, Section 6, is currently being finalised and is expected to pass into law in late 2007.

Regional plans fall into a number of categories; regional spatial plans derived from the PATN, regional planning studies, county planning studies, and town or village planning studies individually or by the cluster areas identified by the master plan study.

To provide a clear and integrated planning framework the tourism components of regional and local plans must be completed. This requires that a planning hierarchy is respected with Section 6 (Tourism) of the PATN assuming the key position as the national strategic tourism plan.

The regional tourism plans should be referred to the Ministry of Development, Public Works and Housing for approval, while county plans must be referenced to regional plans and city plans to county plans.

The role of the National Tourism Organisation in this process will be to:

- Supply timely accurate and relevant statistical information and projections to the central and regional planning authorities.
- Participate in the preparation of the national and regional plans
- Focus marketing and promotional activities in support of the approved plans
- Review the implementation progress of the plans and provide feedback to the national and regional planning authorities.

It is strongly recommended that no applications for funding be considered by the National Tourism Organisation or Regional Development Agencies until national, regional and municipal tourism plans have been prepared enabling the suitability of funding applications to be evaluated against an approved planning framework and objectives.

Implementation

At the level of city and county planning there is a clear need to prepare detailed design standards and guidelines to ensure that design standards and quality in tourism zones meets acceptable international standards. Design guidelines should establish standards for the following;

- **Tourist Accommodation.**
- **Building Design.** Defining site coverage, maximum building height and development ratio, or plot ratio. Building style, for example the adoption of a 'Transylvanian' architectural vocabulary, wall finishes, roof form and materials, fenestration style, external works design and materials, and colour palette.
- **Public Spaces and Landscaping**
- **Parking and Access**
- **Common Visitor Facilities**

In mature and developed resort areas, both on the coast and in the mountains, it is necessary to identify special purpose vehicles or institutional frameworks that will facilitate and guide restructuring and redevelopment. It is recommended that these be in

the form of public private partnerships (PPPs) and structured as local resort management companies.

Finally, development control is an issue that must be addressed and resolved. Local plans will identify planning zones, permitted uses and standards. It is crucial, however, that these measures are fully enforced by local and regional authorities and the proliferation of sub-standard and conflicting uses is ended if a quality tourism product is to be achieved.

10.3 Human Resource Development

There are a number of generic weaknesses in the training and education of staff for the tourism industry. There is generally a lack of awareness within the country of tourism's value as an economic sector, of the opportunities it offers people throughout society and of how to interact with visitors. The staff currently employed in the industry often lacks the skills and training to perform at international service standards. Training and educational institutions provide mainly academic instruction and graduates frequently lack the practical skills required by employers. Many service staff are leaving Romania to work abroad where salaries and opportunities are perceived to be better, thus creating a shortfall of qualified staff.

To remedy the current deficiencies and provide sufficient well trained and motivated staff for the future a number of actions are to be taken:

- Tourism awareness campaigns, combined where appropriate with customer care training, in schools (primary and secondary levels), among public sector employees and tourism staff at all levels.
- Establishment of a Tourism Human Resources Development Advisory Committee with representation from the private sector (employers), training bodies, Ministries of Education, Tourism and Labour and the NTO to oversee the provision of quality training to meet industry needs. Alternatively a separate Tourism Human Resource Foundation might be established to perform this role.
- Establishment of a series of regional Hospitality Training Institutes to deliver vocational training
- Review and updating of the course structure, curriculum and syllabi of travel and tourism related courses at existing specialised training institutes
- Development of up-to-date occupational standards and of up-to-date European tourism training standards
- Utilising foreign trainers train a team of travel and tourism trainers to provide skills upgrading courses to current employees and thereafter operate from regional Hospitality Training Institutes delivering vocational training
- Delivery of guiding skills courses to tour guides over and above their academic training qualifications
- Provision of Tourist Information Centre staff with training in enquirer communication and information centre operations skills
- Provision of NTO and Ministry staff with regular training in their speciality fields
- Introduction of a Hospitality Training Levy on accommodation to be used by a Training Trust on the instructions of the Tourism Human Resources Development Advisory Committee to ensure the continued delivery of vocational training to all industry sectors at affordable rates.

10.4 Product Enhancement

It is the responsibility of the Local and County planning authorities and National Park and Nature Reserve administrators to develop tourism plans to meet current and future visitor requirements and to integrate these into overall plans for their areas of responsibility. For the most part the private sector is expected to invest in specific tourism product improvements and new developments. These should comply with local tourism planning guidelines and any application for external funding shall be contingent on compliance with local tourism plans.

There are products which require public sector support and coordination. These include the following:

10.4.1 Accommodation

Customers are consistently demanding higher quality accommodation and the majority of the serviced accommodation stock is below standard.

There is a major imbalance between the current supply of serviced accommodation and the projected demand. Based on a notional 65% room occupancy rate there is an immediate demand for more High grade rooms (5 and 4 star); there is sufficient Mid grade accommodation (3 and 2 star) until nearly 2020; whereas there will still be double the requirement of Low grade (1 star and unclassified) rooms in 2026.

The current classification system for accommodation is unnecessarily complex and onerous to assess. The criteria need rationalising and a revised quality assessment system should be introduced incorporating service standards as well as facilities.

The following actions are required:

- Continued construction of new 4 and 5 star properties in selected areas with designs compatible with the environment and surroundings
- Upgrading of Mid range accommodation to meet higher visitor expectations
- Conversion of some Low grade accommodation for other purposes – student accommodation, offices, etc. - or complete removal from the sector
- Significant upgrade of some Low range accommodation to at least 3 star level
- Continued improvements to all levels of accommodation including units in national parks and nature reserves
- Review of the classification system and introduction of a star rating system based on quality of service standards.

10.4.2 Attractions

A diversity of attractions offering a variety of visit opportunities are required. These may be either conveniently on a tourist's itinerary or an excursion from a base where he is staying. Improvements to existing attractions and the introduction of "new" ones in tourism circuits is recommended, including:

Museums and Heritage Attractions

The interpretation, hospitality and retail facilities in many museums, galleries and heritage buildings are antiquated and neither do justice to the cultural and historic assets, nor encourage additional visitors. To improve the appeal and outreach of these cultural and heritage institutions the directors and administration agencies are encouraged to:

- Provide customer care training to staff
- Introduce innovative presentation techniques
- Provide catering facilities where appropriate
- Expand retail operations

Museums and memorial buildings designated as of National or Local importance should receive preferential consideration in respect of resources and technical assistance.

Salt Mines

Romania's salt mines are operated on behalf of the government by Salrom. Apart from mineral extraction, several mines attract visitors for medical treatment and tourism purposes. To improve the visitor experience and expand visitor numbers Salrom should:

- Expand and implement the Praid mine tourism development project including visitor reception facilities, the mine visit experience and interpretation and marketing
- Develop feasibility studies and business plans for other accessible mines and secure donor and/or commercial investors for their implementation

Caves

Romania has a wealth of caves, which have great potential for development as visitor attractions. There are significant safety and environmental impact implications inherent in expanded access. In order to meet both the opportunities and challenges it is proposed to develop a number of "show caves". A number of suitable caves have been identified in conjunction with speleological specialists. Administrators of these caves suited to general public visits are encouraged:

- to develop visitor access, thematic lighting, interpretation and visitor reception facilities and promote them as visitor attractions

Narrow Gauge Railways

Narrow gauge railways have a particular appeal to visitors combining heritage with activity and enjoyment of the countryside all at once. Viseu de Sus is the only narrow gauge railway currently operating on a regular basis. Trains based at Moldovita and Abrud-Campeni operate for groups on demand. Operational overheads are high, which makes the viability of these heritage attractions difficult.

The Sibiu – Agnita line has recently been designated as an historical monument, which is hopefully a first step to the re-introduction of trains on this route both for tourist and resident use.

10.4.3 Business Tourism (MICE)

In order to establish Romania as a competitive destination for international meetings and conventions commensurate with its membership of the European Union and to improve the seasonality of tourism action is to be taken to:

- Research the optimum size and configuration of multi-purpose convention centres for Bucharest and Constanta to meet potential market demand
- Develop purpose-built convention centres in Bucharest and Constanta as private / public sector partnerships
- Upgrade the marketing of Romania as a destination for international meetings through a collaboration between the NTO and the Romanian Convention Bureau

10.4.4 Spa Tourism

In most spas the infrastructure, whether private or public sector owned, is in a very poor condition. The vast majority of accommodation is two star or below. There is an over supply of accommodation in quantity though a lack of quality accommodation.

Seven out of eight spa bed nights are paid for by government subsidised Bilete. The treatments offered are geared to traditional practices with often very old equipment, not to the desires of today's paying customers.

There are a few examples of individual properties in spas upgrading and expanding their facilities and product offer to meet market expectations.

In order to assist with the regeneration of spa resorts the following action is to be taken:

- Research into the domestic and foreign market demand for traditional spa treatment; expectations of foreign markets of spa resorts including details of facilities, treatments and activities; communications channels to spa clients
- Provision of resultant advice and intelligence to spa resorts and operators to assist in redevelopment, expansion and marketing planning
- Development of marketing campaigns by the NTO and spa resorts to identified market segments
- Vesting of the concessions for the distribution of spring waters, muds, gases and other natural therapeutic resources with local authorities to ensure equitable access for the common good
- The preparation of integrated resort development plans with emphasis on the restoration of heritage buildings as a pre-requisite to applications for funding

10.4.5 Rural Tourism

Rural Tourism

Rural tourism can be considered in its broadest sense as comprising recreation in rural settings or rural environments for the purpose of participating in or experiencing activities, events or attractions not readily available in urbanised areas. This includes national parks and nature reserves, open countryside, villages and agricultural areas. It embraces ecotourism and agritourism.

Rural tourism is becoming increasingly attractive as tourists become more mobile and seek a change from urban life. The degree of their immersion in rural life varies. Some visitors will purely wish to spectate. Others will want direct involvement in environmental protection and conservation projects or in agricultural activities. There are developmental challenges and promotional challenges to be met if the appropriate products are to be provided and communicated to potential visitors.

There has been a significant increase in recent years in both the quality and quantity of rural accommodation thanks to individual investors and SAPARD funding. Activities of organisations such as ANTREC are assisting rural suppliers reach the market. Organisations such as ADEPT and the Ecotourism Association are helping rural communities appreciate what tourism means and how they can benefit from it. The formation of more local cooperatives of rural tourism products – attractions, accommodation, activities and retailers – are needed to focus visitor attention on particular areas of the country.

More non accommodation product development is required in order to improve the range of visitor attractions and activities on offer. In particular opportunities exist for the environmentally sustainable expansion of visitor activities in the protected areas. These can have a significant beneficial impact on local community suppliers in or around the protected areas.

Better advance publicity of traditional rural events is needed to facilitate visitor planning.

It is recommended that national parks and nature reserves prepare sustainable tourism development plans following the Retezat model and seek funding for identified visitor facilities.

It is also recommended that the NTO give priority public relations and promotional assistance to the various rural associations as the range of products and activities they foster represents some of the most important core values of Romania's brand image.

The proposed network of NTO regional development officers will assist individual rural suppliers with development advice in a broader regional and national context. They will also facilitate the establishment of local promotional consortia. At the same time they will facilitate the collection of event, attraction and activity data through the local TIC network for inclusion in the national tourism database and relevant promotional activity.

10.4.6 Coastal Tourism

The coastal resorts are experiencing a decrease in visitor traffic as the product offer has failed to match increased visitor expectations. The reasons behind this situation are deep rooted. What had previously been integrated resort developments under state control and management have evolved into hundreds of medium to small commercial operations with little relationship one to the other. In the period since privatisation both the domestic and international tourist markets have matured and are now demanding a more sophisticated range of products and services. With fragmented ownership and no clear strategic direction the seaside resorts have found it difficult to respond to changing markets and have suffered as a result.

The difficulties faced by the resorts are numerous and include:

- A predominance of low quality accommodation mostly in large units
- A very short season, which means uncompetitive prices have to be charged even to break even
- Impossibility of attracting and retaining professional staff for a short season
- Great competition between hotels for the available business rather than collaboration to grow the business
- Insufficient activities and entertainments in and around hotels and resorts to meet the requirements of today's market
- Short sightedness among hoteliers capitalising on the growing weekend visitor demand at the expense of losing longer stay group business over an extended season
- Beach erosion – in some resorts there are now more than twice as many bed spaces as beach spaces
- Poorly maintained public infrastructure
- Transport congestion and insufficient parking
- Conflicting interests of beach concessionaires and accommodation suppliers
- Loss of most charter operations to Kogalniceanu Airport

Continued efforts are required to attract low cost carriers to Constanta airport to increase destination publicity as well as passengers. The proposed establishment of two hospitality training institutes on the coast may alleviate the personnel problem somewhat. The proposed large scale conference centre for Constanta may also contribute to off season business. Studies into solutions of the beach erosion problem are on-going, but even if they provide successful solutions there will still be a need for an increase in off beach activities to fulfill the demands of today's market, which requires 'beach plus' – not just beach activities, but additional excursions, inland activities, attraction visits, shopping, etc.

Individual operator initiatives in upgrading and diversifying their product offer are essential but can only partly resolve the fundamental problems. To resolve these individual resort local authorities need to develop, on the one hand, integrated tourism development plans to give their resorts a clear direction, which will meet today's market needs and provide season extending reasons to visit. On the other hand resort management companies with all stakeholders as shareholders should be formed in order to overcome the disputes and deterioration in quality and variety of service provision that fragmented ownership has created.

10.4.7 Cultural Tourism

Romanian culture forms a significant motivation for many visitors. The architectural and religious monuments, many of them still living cultural assets, are major attractions. The wealth of monasteries, churches and other religious buildings form the backbone of many group and individual tours. Their maintenance and improvement for visitor enjoyment and appreciation is imperative. This requires improvement in visitor reception facilities, interpretation, as well as the provision of retail facilities and catering where appropriate.

The visual arts, whether in museums or galleries, require similar presentation support.

Cultural events and traditions offer significant potential for tourism growth, which can assist in their being sustained and not lost to future generations. There are many

festivals and traditional annual events that do not attract the visitor interest they warrant. There is a deficiency in advance publicity for many such events, in time to permit tour planning and promotion. Better event data collection and dissemination is required.

The range and calibre of performing arts, particularly in major cities, is excellent. Prices and late availability of tickets are appealing to foreign visitors in particular. However, both publicity and ease of booking need to be improved significantly. Centralised and computerised box offices for performing arts, ideally with Internet booking options, are required.

10.4.8 Activity Tourism

Romania offers its visitors a wide range of activities. Many of these are regulated, administered and promoted by associations in conjunction with the relevant authorities – hunting, fishing, mountaineering, boating, golf, equestrianism, etc. – and further intervention is not currently required. In some areas direction and assistance is required.

Hiking

There is a well developed system for marking trails, particularly in mountain areas, and certifying them as maintained and safe for hikers. There is a lack of coordination in the promotion of these hiking opportunities and provision of requisite information to the significant number of potential hikers both in Romania and abroad. The NTO and National Parks Administration Romsilva as custodian of most certified trails are to:

- Introduce a national system for trail mapping and collection of ancillary information to meet hiker needs
- Research the hiking market.
- Develop and implement a hiking marketing campaign
- Revise the certification criteria for trails to include all information, GPS data etc. required.

Winter Sports

Winter sports have become very fashionable in Romania in recent years. This has resulted in rapid development of ski and other facilities in many mountain regions often without adequate planning. There are numerous instances of resultant stress on local infrastructure and the environment. Some resorts suffer from short (often unviable) operating seasons due lack of snow, which cannot always be remedied artificially. Development has frequently proceeded without researching market demand.

To improve viability of existing resorts and prevent uneconomic further development the following is recommended:

- Research into future market demand
- Stricter planning controls on winter sports developments to ensure market demand, no adverse environmental impacts and adequate local supporting infrastructure
- Consideration of staggering school holidays in February to help improve off-peak business

Cycling

Cycling is increasingly popular both in Romania and elsewhere in Europe and the region. It is proposed that work on mapping and describing the Danube Cycling Route be completed and a promotional campaign for the route be undertaken. This should bring some additional tourism to relatively under developed areas of the country. It should also stimulate interest in the development of additional cycling routes elsewhere and act as a prototype project.

10.4.9 Bucharest for City Breaks

Apart from being a major business travel destination Bucharest has great appeal for leisure tourists. The capital has many of the characteristics and appeals that have made other European cities successful city break destinations. There is considerable potential to increase this tourism particularly at periods when accommodation is available, such as at weekends, in the summer and over the Christmas and New Year periods. The advent of low cost carriers makes short breaks to the city increasingly attractive.

There are a number of actions, which will encourage this development, including:

- The provision of a Tourist Information Centre to assist the increasing number of independent visitors
- A central booking facility for events
- A hop-on hop-off city sightseeing tour operation
- Dedicated bus shuttles between the airports and central Bucharest

Extension of the programme of major events such as Formula 3 racing will also help establish Bucharest's position as an attractive destination.

10.4.10 Danube Cruise Ship Facilities

The cruise traffic on the Danube has been increasing rapidly and giving many tourists their first impressions of Romania. The reception facilities at the docking points in Romania do not meet the standards of those provided by other countries through which the river flows. To enhance these visitors' experience the following action is required:

- Provision of a central information point for cruise operators to communicate ship manifests, etc.
- Coordination of harbour fees and charges into a uniform system that is competitive with other Danube countries
- Improvement of docking facilities, harbour reception facilities and landside access to and from docking facilities

10.5 Information Services

Signage

To facilitate the orientation of the increasing number of independent visitors the system of brown tourism road needs to be introduced nationwide. A national protocol for the installation of these signs conforming to international standards is required. It is recommended the Ministry of Transport establish the qualification criteria for brown

tourism road signs with the NTO and devolve the authorisation and installation of signs to County authorities. Action is required as follows:

- Ministry of Transport to specify tourism sign criteria including type, location, design as well as application, authorisation and erection procedures
- County authorities to compile a plan of optimum tourism sign requirements in their area
- Submissions to be made for funding via Regional Development Agencies
- Application procedures to be drawn up for private sector funded signs featuring commercial tourism products and locations.

Tourist Information Centres

The need for an improved Tourist Information Centre (TIC) network has been recognised and a specific allocation for its development has been made in the EU Structural Funds. With advances in information technology tourists have come to expect information when and where they want it. This may be at a pre-planning stage, planning stage (website) or during the visit. TICs are a valuable resource to provide on the spot information and influence visitors' choices. They can help extend length of stay and also encourage repeat visits.

The life blood of TICs is comprehensive, impartial and current information. The development of a national tourism database is an essential resource on which TICs can draw whether directly or via the websites, which are the public face of this database.

Visitors expect to pay for some information services, such as guide books and maps, but expect to be able to purchase these at TICs. They also expect the TIC to be able to make accommodation reservations and sell event tickets. Provision needs to be made for TICs to engage in commercial activity as long as it does not compete with tourism operators' business.

Standards of information provision need to be set and it is recommended that the NTO establish guidelines for TIC operations nationwide and provide on-going assistance to local authorities and other sponsors in TIC development and systems improvement including training of TIC staff.

Only official, NTO approved, TICs should be permitted to display the international "i" sign so that visitors can expect a high level of service wherever they see it displayed.

10.6 Statistics and Research

The statistics on foreign arrivals were historically of limited value as they, for instance, did not permit a distinction between day visitors and tourists staying at least one night. Purpose of visit was also not identified. A new system of foreign visitor data collection will have to be introduced following accession to the European Union as the traditional opportunity of counting at land borders, at least, is no longer available. Although this makes the data collection process more complex, it also presents an opportunity to incorporate purpose of visit, country of residence data, etc. into the process. External advice on the optimum methodology for collection of this data is required.

There has been no accurate means of calculating foreign visitor expenditure and the Bank of Romania is keen to remedy this in order to gain clearer balance of payments information. This will probably involve the introduction of an exit survey. For domestic tourism expenditure an extension of the current Household Survey may be the best approach. However, in both cases technical assistance in developing the best methodology is required.

An on-going exit survey will also be required in order to develop data on visitor profiles, activity in Romania and visit satisfaction. This is a basic requirement in accessing data for product and service development and marketing purposes. This can be combined with the expenditure data collection process.

The collection of data on accommodation and occupancy needs to be refined. Some of the information currently collected is of limited use. However, accommodation occupancy levels by area and accommodation type should be improved and findings communicated back to the sector to facilitate their own performance assessment and forward planning.

Additional research may also be required in order to complete the requirements of the Tourism Satellite Accounting system, which is needed both to provide a better assessment of the overall economic impact of tourism and to allow comparison of performance with other tourism destinations.

The National Tourism Organisation needs to strengthen its statistical and research competence and, whether working with the National Institute of Research Development in Tourism (NIRDIT) or independently, develop a rolling programme of market research, market segment research and activity evaluation studies through which to plan its marketing activities better.

10.7 Destination Marketing

The NTA does not currently have a clear strategy based on full and deep understanding of market characteristics and trends for the marketing of Romania. A series of market surveys was carried out in 2006 but no use has so far been made of the findings and conclusions in shaping a coherent marketing and promotional strategy or programme, based on a ranking of source markets.

The mix of current marketing and promotional activities (i.e. offices abroad, tourism fair participation, website, collateral materials, advertising) is not coordinated or designed to fulfil specific strategic objectives. These activities tend to be undertaken in an ad hoc, scattergun manner.

The NTA does not provide either strategic direction to its offices abroad – in respect of market positioning and segmentation targeting – or sufficient support for their operations. There is also no performance benchmark criteria system for offices abroad or evaluation of the cost effectiveness of their operations.

Consumers in tourist source markets are increasingly using website research and booking engines for their travel requirements. The operation of street level destination promotion offices is consequently no longer a cost effective system for market penetration and is increasingly being abandoned by other destinations.

Romania's representation on tourism websites is poor: the style and design of www.romaniatourism.com is dated in appearance and the country is not as well represented on other relevant websites as are competitor countries.

The extensive and recently expanded programme of attendance at tourism fairs abroad is not monitored or evaluated in terms of any resultant increased tourist flow/income to the country. The programme's impact and effectiveness is unknown.

There is insufficient exposure of Romania and its tourist product offering in the media of main tourist source markets, leading to - at best – an unclear perception of the country as a serious and bona fide tourist destination. In consequence, tour operators do not recognise a groundswell of demand for Romania from their customer base and do not actively consider introducing new programmes to the country.

In-depth knowledge of Romania and its tourist product offering is poor among tour operator and travel agency personnel in main tourist source markets. These personnel cannot “sell” a destination on which they have at best only a superficial knowledge.

Romania does not have either a clear or strong image in the marketplace, and its destination branding gives mixed messages. “Simply surprising” encapsulates the fact that visitors typically find their experiences in the country exceed their expectations, but fails to recognise that surprises can also be unpleasant.

The NTA is currently not regarded positively as a marketing organisation either by the Romanian tourism private sector or by regional or local administrations around the country. Left unchanged in terms of structure, personnel and systems, it will not achieve the necessary close and productive working partnerships necessary to lead the establishment of Romania as a major tourism destination.

The following changes in marketing approach are recommended:

- Tourist source markets should be categorised on the basis of the scale of market opportunity for Romania in the short, mid and long terms according to a three tier rating system:
 - **Primary/priority Markets** i.e. Germany, Austria, Italy, France, UK/Ireland, Hungary, Russia and the USA,
 - **Secondary Markets** i.e. Scandinavian countries, Benelux countries, Iberian peninsula and other EU countries,
 - **Opportunity Markets** i.e. China, Japan, other countries (as identified through research).
- A strategy based on a number of target market segments is recommended drawn up from a study of international tourism trends – these to be verified and modified as indicated through the market research studies proposed below. The principal market segments identified are:
 - International & Domestic*
 - **short breaks** to Bucharest and, in time, other cities to which low cost carriers operate
 - **business** (including conferences) to Bucharest and other industrial/commercial locations in line with the rise in business activity following Romania's accession to the EU

- **Black Sea coastal resorts** – both among domestic tourists and from principal international markets of Germany, France and Scandinavia as the resorts upgrade and diversified activities are developed
- **health and wellness market** – with existing spas developed to target the most appropriate sub-segments of the market
- **cultural/heritage tourism** – probably the largest market opportunity focussed on a series of “hubs” or “gateways” and featuring “tour circuits” either around “clusters of attractions” close to a single hub or linking together multiple hubs
- **adventure/sports** – principally targeted at younger age groups

International (mainly)

- **nature and local community-based activities, lodging etc.** (collectively termed ecotourism, or more accurately, geotourism) i.e. small-to-mid scale operations in various parts of the country (especially in the Carpathians and the Danube Delta) and marketed as individual attractions and as part of an ecotourism circuit
- **young travellers** – no European country has sought to identify itself as the principal destination for young travellers. Romania offers a good range of outdoor activities – both in summer and winter; it has a growing programme of music, sports and other events in Bucharest and elsewhere in the country; and it offers relatively low costs. These are all attributes that have appeal to young travellers

Domestic (mainly)

- **winter sports** – in line with the growing interest for outdoor winter recreation among Romanians. However, little growth potential in international markets because of the low height of slopes and lack of guaranteed snow and relatively difficult access compared with other European ski centres
- **recreation/theme parks** – developed on the outskirts of major urban centres and resort areas (e.g. Bucharest, Constanta) to provide diversified entertainment facilities. Examples might include water parks, thrill rides, and folk/culture parks (the last named also being an attraction for international tourist markets).
- A detailed market study should be conducted into the health and wellness market and the different “soft” and “hard” forms of interest/activity it constitutes i.e. ranging from the opportunity to rest and relax in a pristine natural setting with gentle walks, massages etc. available (“soft”), to full-scale medical treatments – surgery – (“hard”). The country’s specialist spa facilities are then to be related to the assessed potential, and recommendations made as to which of the different sub-segments of the health and wellness market each of these resorts should concentrate on in its upgrading, renovation and future development.
- A phased series of market research studies to be carried out in Primary/priority, Secondary and Opportunity tourist markets to ascertain:
 - market size and potential (including forecasts),
 - profile and characteristics of key market segments to be targeted,
 - assessment of the likely future mix between package tourists and independent travellers
 - assessment of the effectiveness of the various marketing, promotional and public relations tools and techniques in converting the potential of the key market segments.

- An immediate cost benefit analysis study should be carried out of the network of NTA offices abroad, considering specifically:
 - office locations – on or off street level
 - directly employed Romanian personnel versus marketing representation contracts
 - reporting system between offices abroad and head office
 - evaluation of the marketing and promotional activities carried out
 - definition of performance benchmarks and criteria by which the effectiveness of offices can be measured, monitored and assessed.
- The upgrading of the national tourism destination website to be accorded priority attention.
- The programme of international tourism fairs to be reduced to those in the Primary and Opportunity markets – the former to increase market penetration, the latter to achieve market awareness and stimulate interest. At the same time, a set of evaluation criteria need to be established to determine the cost effectiveness of participation.
- To address the weak perception of Romania in tourist source markets a major expansion in the programme of visits from media in all target markets.
- A significant annual programme of educational and familiarisation trips for the personnel of targeted tour operators and major travel agents. Participants to be selected based on their potential to generate tourism business for Romania.
- The NTA Promotions Department to be restructured into a Marketing and Promotions Directorate with particular attention in respect of:
 - statistics and market research of source markets and segments,
 - responsibility for individual source markets or groupings of markets through a system of “desk officers” working with offices abroad and market representatives,
 - digital marketing - website development and maintenance,
 - industry development within Romania – through, inter alia, the encouragement of public/private partnership initiatives and programmes.
- A professional agency to be engaged to explore the whole subject of Romania’s destination image and branding. The country’s key attributes and resources should be incorporated in the imagery and branding concept developed in a distinctive way that permits Romania to differentiate itself from regional competitors. It is also important that the concepts developed can serve as the “house of brands” for a series of sub-brands relating to the themes of tourist interests/attractions around the country e.g. Transylvania, Maramures. These sub-brands need to be developed as part of the process and will require extensive dialogue between the agency appointed and both the NTA and regional and local authorities. It will not be appropriate for the eight regional development agencies to develop tourism brands independently for their own areas and tourism products because the tourist themes/interests do not fit neatly into political or administrative boundaries.
- A sustained marketing and promotional programme both for domestic and international markets to be devised geared to realising Romania’s potential in the identified markets and segments. This will comprise three components:
 - **Public** - advertising and promotional activities (paid media, collaterals, website, tourism fairs),
 - **Travel trade** - advertising and promotional activities (trade advertising, photo/audio visual library, tour operator support, joint promotions, tourism fairs, familiarisation visits), and

- **Media** - public relations (representation abroad, press releases, information briefs/e-newsletters, media visits, celebrity endorsement, publicity events).

In the short term, the focus in international markets will be on image development rather than on the intense promotion of specific products – thereby allowing the indicated developments and upgrading of different products to be advanced; while in domestic markets a more intense programme of product-based marketing and promotion will be needed to restrict the outflow of Romanians on holidays to foreign destinations.

10.8 Environment

The pristine environment is perhaps Romania's greatest asset as a tourism destination. Regrettably this is damaged by negative practices, which pose a very real threat to the image of the country. The prime area of concern is litter and improper waste disposal. A number of measures are required:

- Strict enforcement of waste disposal regulations,
- Restriction of use of plastic bags and bottles by the introduction of mandatory charging and / or deposits
- Expansion of localised 'clean up' initiatives into a national clean up campaign
- Introduction of a 'Romania Inflorita' competition to encourage flower and shrub planting in order to improve the attractiveness of towns and villages and increase civic pride
- Strict controls on stray animals

10.9 Investment Policy

Romania presents a more favourable investment environment than many other countries in the region. Rates of VAT and Corporation Tax are generally lower and the accommodation sector enjoys a favourable 9% VAT rate. The presence of many European banks as well as a healthy Romanian banking sector means that loan facilities are becoming more competitive.

Romania has already benefited from much donor support for tourism, the PHARE and SAPARD programmes being prime examples, but with strategically important assistance from other agencies. EU Structural Funds will extend this support until 2013.

Much of the investment in major new and renovated hotels has come from Romanian investors, but the involvement of renowned international hotel companies in management contracts has raised the profile of the tourism sector among international investors.

Many local investors have become involved in tourism, particularly in the guest house sector, but often with limited experience of the hospitality industry. While this sort of investment is welcome, guidance is clearly needed to encourage further investment and to avoid costly errors. For this reason the appointment of NTO regional tourism development advisors is recommended to work with local authority planning departments and Regional Development Agencies as well as individual investors.

To attract larger scale investments it is recommended that within two years the NTO should stage the first of a series of Tourism Investment Forums in conjunction with Chambers of Commerce and the UNDP, which have particular experience in this area. In preparation for this standardised Investment Opportunity Profiles should be developed by local authorities and Regional Development Agencies reflecting the opportunities identified in their local and regional tourism development plans.

11. Regulatory Framework

There is currently a plethora of legislation relating directly to tourism. It is proposed that this should be consolidated in order to remove any anomalies, simplify comprehension, and improve ease of implementation. At the same time new legislation is recommended including:

- The establishment of the National Tourism Organisation as a semi-autonomous, state-funded body reporting to a private/public sector Board of Directors chaired by the State Secretary for Tourism, without formal constraints on staff levels and with the ability to raise funds.
- An annual licensing and classification system excluding classification of restaurants and catering establishments; featuring a rationalised range of accommodation criteria; incorporating quality grading based on subjective as well as physical criteria; and charging license fees.
- The vesting of discotheque monitoring with local authorities
- The authorisation of Tourist Information Centres to engage in commercial activity such as accommodation reservations and sales of tourist literature and collateral material.
- The repeal of the requirement for a resort to have a physical Tourist Information Centre

12. Implementation Strategy

Objective

The National Tourism Development Master Plan will only become viable if it is implemented in a timely fashion. It is not sufficient for just some elements of the plan to be actioned. The recommended actions are mostly interconnected and dependent one on the other. In order to ensure essential elements are not neglected this implementation strategy and its procedures have been established.

Implementation Group

This group comprises:

- State Secretary for Tourism – Chairman
- 10 members representing Ministries, regional and local authorities and main private sector disciplines
- NTA General Director Development – Secretary

and will be supported by the NTO Development Department.

It will meet every three months to:

- Review progress against each of the Action points within the Master Plan
- Communicate with the agencies or persons listed as "Lead" organisation in the event that satisfactory progress is not being made to enquire the reasons and to offer assistance
- Communicate a progress report on the implementation of the Master Plan to the Minister responsible for Tourism and the tourism industry after each meeting

13. Action Plan

The actions listed in the Action Plan below are presented in order of priority and by type:

- Immediate,
- Short Term (initiated by the end of 2008),
- Medium Term (initiated before 2013), and
- Long Term (initiated before 2020).

The "Duration" is the anticipated length of time the action will take whenever it is started.

The "Lead" is the organisation considered the most appropriate to prepare proposals, seek funding and lead the implantation of the action.

"Partners", who may assist in the action, are listed.

The "Funding" is an indication of sources that may be approached for finance. Applications for funding have to meet the relevant eligibility criteria. Listing here is no guarantee of approval.

The "Success Criteria" are measures to evaluate whether the action has been successfully completed.

TA = Technical Assistance
MIMMCTPL = Ministry for Small and Medium Enterprises, Trade, Tourism and Liberal Professions
RNIS = Romanian National Institute for Statistics
NIRDT = National Institute for Research and Development in Tourism
GTZ = Gemeinschaft fuer Technische Zusammenarbeit
UNDP = United Nations Development Programme

ESF– HRDOP = European Social Fund HRD Operational Programme

EU-SF ROP = European Union Structural Funds Regional Operational Programme

National Tourism Development Master Plan - Action Plan **DRAFT**

PRIORITY - IMMEDIATE								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
	STRUCTURAL ARRANGEMENTS							
	Establish a semi-autonomous National Tourism Organisation reporting to a Private / Public sector Board chaired by the State Secretary of the Ministry with responsibility for Tourism.	Introduce legislation to establish a new government funded national tourism organisation under a private/public sector Board with development, marketing and HRD responsibilities and authority to receive external funding	Involvement of the industry in the management of the NTO should ensure better collaboration and swifter progress industry wide	6 months	MIMMC-TPL	State Secretary at NTA	n/a	Legislation by spring 2008
	Enable private sector tourism interests to collaborate better with the public sector	Facilitate a gathering of industry associations to form a Confederation of Tourism Associations	Allow the industry to address government with a unified voice and achieve better collaboration	6 months	MIMMC-TPL	Tourism Industry Associations	n/a	By end 2007
	NTO Offices							
	Evaluation of the operations of the NTO offices abroad with a view to reorganizing the network	Cost benefit analysis study to examine: street level vs. non-street level sites; use of Romanian staff vs. marketing representation contracts; reporting systems between offices and HQ; effectiveness of	To determine the optimal form of representation abroad and to establish a system of performance measurement	6-9 months	NTO	Private sector associations	Own resources	Study complete by spring 2008

PRIORITY - IMMEDIATE								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
		marketing and promotional programmes; and definition of performance benchmarks/criteria						
	PLANNING AND INFRASTRUCTURE							
	To provide a national strategic planning context for tourism development	Complete Section 6, Tourism, of the National Spatial Plan	To provide a national strategic planning context for tourism development	Ongoing	Ministry of Development and Public Works	NTO	n/a	End of 2007
	HUMAN RESOURCE DEVELOPMENT							
	HRD Organisation and Coordination							
	EITHER Create one focal point of all HRD and training activities to initiate, organise, coordinate and monitor all training activities	<ul style="list-style-type: none"> ▪ Establish a strong HRD, Training and Tourism Awareness department within a new National Tourism Organisation ▪ Establish a National Hospitality and Tourism Training Advisory Committee 	In order to ensure hospitality training keeps up to date with industry needs a strong private:public sector partnership is needed to oversee developments	Ongoing	MIMMC-TPL + TA Master Plan Task Force	-	Own resources	Committee established by end 2007

PRIORITY - IMMEDIATE								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
	OR	OR						
	Create a separate independent NGO body to initiate, organise and coordinate Tourism Awareness Training and Industry Upgrading Training through its mobile training team	<ul style="list-style-type: none"> Establish a Mobile Hospitality Training Foundation (MHTF), headed by a Managing Director, employing trained and qualified mobile trainers, controlled by a Management Board, representing public and private sector 	To establish a new (parastatal) National Tourism Organisation with a strong HRD department, will take some time and effort. In order to be able to act fast in implementing the recommended actions an independent NGO should be created.	-	MIMMCTPL +TA Master Plan Task Force	Private sector associations	National budget	Foundation established by end 2007
	Tourism Awareness	“ROMWELCOME” programme						
	Develop general tourism awareness and visitor satisfaction for industry staff	<ul style="list-style-type: none"> Train mobile trainers and develop courses on tourism awareness and visitor satisfaction (TA Expert) Conduct tourism awareness training seminars within the industry (Mobile Trainers) Conduct applied training seminars on hospitality and tourism awareness and guest 	<p>A Train-the-trainer approach will have the best possible multiplier effect, because of the high quantities and the language barrier.</p> <p>The implementation of this programme is a continuous process which will take at least some years</p>	<p>5 weeks</p> <p>2-3 years</p>	<p>NTO/HRD or MHTF</p> <p>NTO/HRD or MHTF</p>	<p>TA</p> <p>Trade Associations</p>	<p>ESF - HRDOP</p> <p>ESF - HRDOP</p> <p>ESF - HRDOP</p>	Mobile trainers trained and operational

PRIORITY - IMMEDIATE								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
		satisfaction for spa resort employees, including medical and para-medical staff (Mobile Trainers)						
	Upgrading Existing Skills							
	Capacity building and Institutional strengthening of the NTO	<ul style="list-style-type: none"> Upgrade tourism administration and organisation skills (planning and development, research and statistics, marketing and promotion, etc.). TA expert and local trainers. 	In order to create a strong NTO, implementing government policy and strategy and provide services to the private sector, qualified NTO staff is a critical factor	2 years	NTO/HRD +TA	-	ESF - HRDOP	2 staff trained per month 2007 to end 2008
	Train the existing Tourist Information Officers in Tourist Information and Visitor Centre operations	<ul style="list-style-type: none"> Upgrading course on Tourist Information skills through external TA expert together with 3 local trainers. 	Providing Information to Tourists is a skill. This includes collection, preparing, producing and displaying tourist information.	3 months	NTO/HRD +TA	County and town councils	ESF – HRDOP	First course run by end 2007
	PRODUCT ENHANCEMENT							
	Bucharest City Breaks							
	Generate off-peak (particularly weekend)	<ul style="list-style-type: none"> Open a TIC in central Bucharest 	Bucharest has potential to	1 year	Bucharest City	Airlines, hotels, arts venues,	EU-SF ROP 5.3	TIC with box office open

PRIORITY - IMMEDIATE								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
	tourism to Bucharest	<ul style="list-style-type: none"> with satellites at the airports ▪ Develop a central reservations facility (box office) for all main performing arts venues and events ▪ Provide a dedicated non-stop bus shuttle service between the airports and central Bucharest connecting to all flights ▪ Provide a hop on hop off bus tour of Bucharest ▪ Develop an marketing campaign for City Breaks in Bucharest 	emulate other European City Break destinations. Hotels need to improve weekend, summer and Christmas/New Year occupancy. A short break to Bucharest can inspire repeat visits to other parts of the country.		Council	NTO	<p>Local authority and private sector</p> <p>Local authority and private sector.</p> <p>EU-SF ROP 5.3</p>	by 2008. Airport shuttle operational by 2008. Tourist bus operational by 2008. Marketing campaign by 2008.
	Coastal Tourism							
	Attract low cost carriers to Constanta	<ul style="list-style-type: none"> ▪ Continue negotiations with low cost carriers to establish a number of high profile routes attractive for independent travellers 	Low cost carriers have a proven track record of generating traffic and also generate much awareness for their destinations.	6 months	Constanta airport	Constanta County Council	Own resources	2 carriers operating by end 2008
	Danube Cruises							

PRIORITY - IMMEDIATE								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
	To provide common systems of charging and administrative operations to cruise operators for all Romanian Danube ports	<ul style="list-style-type: none"> Convene annual meetings of all relevant Danube authorities and operators to agree solutions to common issues regarding Danube Cruise traffic 	Compete more effectively with other Danube ports and make Romania a preferred destination for operators	Annual	NTO	Port, Naval and local authorities, Naval Department of Ministry of Transport, tour and cruise operators, Die Donau Association	NTO	Meeting before end 2008
	Hiking							
	To publicise the considerable opportunities for hiking in Romania and make all requisite information available.	<ul style="list-style-type: none"> Prepare development plan for trail mapping and data collection. 	First stage in hiking development programme	3 months	NTO and Administrators of nature reserves and national parks	SALVAMONT and local authorities	EU-SF ROP 5.3 and own resources	Plan by end 2007.
	MICE							
	Produce feasibility studies for international conference centres in Bucharest and Constanta	<ul style="list-style-type: none"> Appoint specialist consultants to research the international meetings market and identify the optimum size and configuration of conference centres for Bucharest and Constanta Prepare outline design specifications and costs of appropriate 	Bucharest is the only EU capital without a purpose built conference centre capable of handling major international meetings and conventions. Its construction would bring significant additional business to Bucharest and first time visitors to the country. Constanta needs	3 months	NTO	Primarii of Bucharest and Constanta with Romanian Convention Bureau	Own resources	Studies complete by spring 2008

PRIORITY - IMMEDIATE								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
		centres	additional attractions to generate off season business for coastal hotels. The local and regional meetings market represents an opportunity for this.					
	Spa Resorts							
	Identify market needs, potential and means of promoting to it.	<ul style="list-style-type: none"> Market research into the domestic and foreign market demand for traditional spa treatment; expectations of foreign markets of spa resorts; communications channels to spa clients 	To determine if a foreign market can be developed and specify product enhancements needed to appeal to it. Identify promotional channels	3 months	NTO	Spa Owners Association	EU-SF ROP 5.3	Research complete by spring 2008
	Winter Sports							
	Improve the viability of current facilities / resorts and ensure future expansion responds to market needs	<ul style="list-style-type: none"> Commission research into future market demand for winter sports to assist in planning of facility and resort expansion 	New facility development should be contingent on proven demand	6 months	NTO	Local authorities	EU-SF ROP 5.3 and own resources	Study by spring 2008
	INFORMATION SERVICES							
	Establish a national	<ul style="list-style-type: none"> Establish a 	This database is	6 months	NTO	TICs and	EU-SF	Database

PRIORITY - IMMEDIATE								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
	tourism database	computerised tourism information database with sections updated by TICs, NTO licensing department and other authorised providers <ul style="list-style-type: none"> ▪ Provide data outputs to websites, TICs and other users. 	the source of data for websites, promotional materials and TICs	and on-going		industry associations	ROP 5.3	operational mid 2008
	STATISTICS AND RESEARCH							
	Statistics							
	Expansion to and improvement of existing tourism statistics collecting	<ul style="list-style-type: none"> ▪ Provision of international technical assistance to NTO and RNIS 	To advise upon the introduction of new data collection methodology and techniques	3 months	NTO/RNIS	Border Police Ministry of Transport NIRD	EU-SF ROP 5.3 and own resources	New systems operational for 2009
	DESTINATION MARKETING							
	Upgrade and increase the presence of, and availability of information on, Romania's tourism electronically	<ul style="list-style-type: none"> ▪ Update and redesign the national tourism websites in line with tourist markets' needs and interests. ▪ Develop material 	To address the increasing trend for consumers to access the internet to research and book their travel and tourism destinations and	Immediate and ongoing	NTO	Private sector associations	EU-SF ROP 5.3	Annual increase of 10% in site visits

PRIORITY - IMMEDIATE								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
		<p>for website offshoots from the parent sites for major markets.</p> <ul style="list-style-type: none"> Study and select for subscription all independent travel and tourism websites. 	arrangements					
	To refine the programme of participation at foreign travel and tourism fairs to improve cost effectiveness	<ul style="list-style-type: none"> Reduce overseas tourism fair participation by concentrating initially only on primary and opportunity markets. Establish a set of targets to be met (relating, for example, to new contacts generated and bookings achieved). Set criteria to be fulfilled by private sector participants as a condition for their subsidised participation 	To reduce wastage in respect of tourism fair participation and to establish monitoring and evaluation systems to enable cost effectiveness to be assessed.	Immediate and ongoing	NTO	Private sector associations	Own resources	Fair targets met
	To create a strong destination image through the development of a powerful, coherent	<ul style="list-style-type: none"> Appointment of a specialist international brand 	To establish the perception in international & domestic tourist	6 months	NTO	Private sector associations, Regional Development	EU-SF ROP 5.3	New brand adopted and used by Romanian

PRIORITY - IMMEDIATE								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
	and persuasive brand	<p>development creative agency to research and define Romania's national tourism brand, and</p> <ul style="list-style-type: none"> Define a strategy for its launch 	<p>markets of Romania as a destination offering a diverse and distinctive range of tourism products of special appeal to current tastes</p>			Agencies, County and Town Councils		and international operators
	To access the necessary technical and management expertise to develop, direct and coordinate the programme of marketing and promotional activities	<ul style="list-style-type: none"> Recruitment of an International Tourism Marketing Specialist to assist the NTO Marketing Directorate become established and proficient. 	<p>Outside assistance is needed in view of: the scale of the institutional changes and relationship building needs (between the NTO and the tourism private sector); and the depth of the knowledge required of tourism marketing trends, techniques and tools.</p>	Minimum 2 years	NTO	Private tourism sector and all other tourism stakeholders	EU-SF Program Access 6	Fully functioning NTO marketing division by end 2009
	ENVIRONMENT							
	To remove unsightly and unhealthy waste	<ul style="list-style-type: none"> Give priority to the enforcement of disposal of waste by public and private sectors in an environmentally sound manner 	<p>The many open waste dumps and illegal waste disposal does great damage to the image of Romania</p>	1 year	Ministry of Environment and Sustainable Development	County and local authorities	National and local budgets	More rigid enforcement by end 2008.

PRIORITY - IMMEDIATE								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
	To remove the cause of much non bio-degradable litter	<ul style="list-style-type: none"> Introduce legislation to reduce the circulation of plastic bags and bottles 	By charging for bags and placing deposits on bottles consumers are encouraged to dispose of them properly	1 year	Ministry of Environment and Sustainable Development	NTA	n/a	Legislation proposed by end 2008
	To remove the health and safety risk posed by stray dogs in Bucharest	<ul style="list-style-type: none"> Collaborate with animal welfare groups to impound stray animals and find responsible owners 	Stray dogs pose a threat to health and also of adverse destination publicity if tourist are attacked	1 year	Bucharest Municipality	Animal welfare NGOs	Local authorities and NGOs	50% reduction in hospital dog bite admissions
	REGULATORY FRAMEWORK							
	To designate official Tourist Information Centres	Introduce a legal requirement for TICs to be approved by the NTO and that only approved TICs may use the International 'i' symbol	Maintain high quality standards for TICs so that visitors know what services they can expect from them.	6 months	NTO	Local authorities	n/a	Legislation by spring 2008
	Enable TICs to recoup some of their costs and provide additional services	Authorise existing and future TICs to undertake commercial activities – publication sales and reservations.	Visitors are prepared to pay for quality information and TICs should seek to reduce their costs by generating revenue provided this does not undermine commercial	2 years	Local authorities	NTO	n/a	Legislation by spring 2008

PRIORITY - IMMEDIATE								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
			operators' activities					
	Improve the monitoring of accommodation standards	Make accommodation licensing and classification an annual requirement and subject to payment of fees	Annual reviews necessary to ensure standards are maintained. Fees contribute towards the cost of the additional assessors required	6 months	NTO	MIMMCTPL	n/a	Legislation by spring 2008
	Remove unnecessary controls	Discontinue classification of restaurants and catering establishments	The industry is sufficiently developed to help tourists make informed choices of where to eat.	6 months	NTO	MIMMCTPL	n/a	Legislation by spring 2008
	Make the accommodation classification system more user friendly and the gradings more meaningful	Rationalise the categories into which accommodation is classified and introduce more effected means of assessing quality. (Technical assistance)	Current classifications are confusing and the gradings imprecise	1 year	NTO	MIMMCTPL	Own resources	Develop new system by mid 2008. Introduce in 2009.
	Clarify tourism legislation through consolidation	Introduce a new tourism law incorporating the existing laws, revisions and new recommendations	Tourism legislation is diffuse and causes confusion	1 year	MIMMC-TPL	NTO	n/a	Legislation by end 2008

PRIORITY – SHORT TERM								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
	STRUCTURAL ARRANGEMENTS							
	Establish a national network of TICs providing common service levels	Produce guidelines for the establishment and operation of a TIC; work with the "owners" of TICs to establish their centres; install equipment; train staff; publicise network	To satisfy the information needs of the increasing number of independent tourists and assist with local reservations particularly for small establishments.	5 years	NTO	Local Authorities and other TIC sponsors	EU-SF ROP 5.3	Guidelines by spring 2008. Upgrade proposals by end 2008. Training by end 2008.
	PLANNING AND INFRASTRUCTURE							
	To provide a regional planning context and strategic guidelines to tourism development.	Prepare integrated tourism development plans for each of the 8 development regions	To provide a regional planning context and strategic guidelines to tourism development	2 years	RDAs	NTO	PHARE	By mid 2008
	To provide local, municipal and commune, Tourism Plans	Prepare integrated tourism development plans for each tourism destination identified in the Regional Tourism Plan	To provide a planning context and strategic guidelines to tourism development	3 years	Local governments	RDAs NTO	PHARE	By end 2008
	To provide guidelines and sample documents for the	Prepare a comprehensive set of	To provide detailed design and	1 year	Ministry of Development,	NTO, Ministry of Culture	Own resources	By mid 2008

PRIORITY – SHORT TERM								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
	preparation of Tourism zone development Standards and Guidelines.	architectural guidelines and planning standards to be met in the development of tourist facilities and areas	development standards for tourism developments		Public Works and Housing	and Cults, Ministry of Environment and Sustainable Development		
	Winter Sports							
	Ensure environmental protection and well planned resorts	<ul style="list-style-type: none"> Make viable business plans, environmental impact studies, and integrated town plans mandatory for new winter sports developments 	Prevent ad hoc developments, which impact adversely on local infrastructure and the environment	1 year	Ministry of Development, Public Works and Housing	NTO	n/a	Issue directive by spring 2008
	HUMAN RESOURCE DEVELOPMENT							
	Tourism Awareness	“ROMWELCOME” programme						
	Develop general tourism awareness and visitor satisfaction for public sector tourism officials.	<ul style="list-style-type: none"> Conduct short applied training seminars on hospitality and tourism awareness for NTO officials (Mobile Trainers) 	In order to create a strong NTO, implementing gvt. policy and strategy and provide services to the private sector, qualified NTO staff is a critical factor	3-4 months	NTO/HRD or MHTF		ESF - HRDOP	10 courses by end 2008
	Develop general tourism awareness and visitor satisfaction for special	<ul style="list-style-type: none"> Conduct applied training seminars on tourism 	Many employees and officials are not directly involved in	1 year	NTO/HRD or MHTF	Ministry of the Interior Ministry of	ESF - HRDOP	10 courses by end 2008

PRIORITY – SHORT TERM								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
	groups indirectly involved in tourism but directly dealing with tourists	awareness and visitor satisfaction for immigration, customs, border police at international airports and border posts. (Mobile Trainers) <ul style="list-style-type: none"> Conduct short applied training seminars on tourism awareness and visitor satisfaction for museum staff (Mobile Trainers) 	the hospitality and tourism industry, but are dealing directly with tourists and their performance is also critical for visitor satisfaction and the image and reputation of the country.	2 years	NTO/HRD or MHTF	Finance Ministry of Culture and Cults County Councils	ESF - HRDOP	10 courses by end 2008
	Develop general tourism awareness and tourism understanding among public authorities (benefits of tourism development)	<ul style="list-style-type: none"> Develop and distribute a tourism awareness “toolkit”, containing flyers and other material containing basic hospitality and tourism awareness information (TA Expert) 	The understanding of the basic principles of hospitality and tourism is critical for national, regional and local decision-making authorities. This includes the 8 Regional Development Agency staff.	3-4 months	NTO/HRD +TA	County and Town Councils 8 RDA's	ESF - HRDOP	Toolkit distributed by end 2008
	Formal Vocational Training	“ROMSKILLS” programme						
	Start and facilitate specialised formal vocational hospitality	<ul style="list-style-type: none"> Develop a network of Hospitality Training Institutes, 	Start modern formal hospitality	3 years	Private initiatives	Ministry of Education, Research	ESF – HRDOP and private	First institute open by

PRIORITY – SHORT TERM								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
	training	in partnership with European hotelschools, who will assist in curriculum development, teacher training, cooperation and exchange. A number of existing non-operational (spa) hotels can be transformed into regional hotelschools, by developing practical training facilities.	<p>training in Romania</p> <p>Train according to the quantitative and qualitative needs of the hospitality industry.</p> <p>Train for jobs and according to occupational standards.</p> <p>Train according to European hospitality training standards</p>		Ministry of Education, Research and Youth	and Youth MIMMCTPL European Hotel schools	sector	end 2008. 8 by 2013.
	Review, restructure and improve formal vocational tourism education and training	<ul style="list-style-type: none"> ▪ Review and update the course structure, curriculum, syllabus of travel and tourism related courses at existing specialised training institutes (TA Expert) ▪ Develop up-to-date occupational standards (TA Expert) ▪ Develop up-to-date European tourism training standards 	<p>Improve formal vocational training for the travel and tourism sector</p> <p>Train according to the quantitative and qualitative needs of the travel and tourism industry</p> <p>Train for jobs and according to occupational standards.</p> <p>Train according to European hospitality training</p>	6 months	NTO/HRD +TA	Ministry of Education, Research and Youth	ESF – HRDOP	Changes introduced by end 2008

PRIORITY – SHORT TERM								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
		(TA Expert)	standards					
	Improve inter-ministerial coordination and communication on formal vocational training needs and access of funds	<ul style="list-style-type: none"> Establish an inter-ministerial committee on vocational hospitality and tourism training 	Share and coordinate educational responsibilities	3 months	MIMMCTPL	Ministry of Education, Research and Youth MIMMC-TPL Ministry of Labour	n/a	First meeting by spring 2008
	Upgrading Existing Skills	“ROMSERVICE” programme						
	Create a Training Awareness within the Hospitality and Tourism industry	<ul style="list-style-type: none"> Hospitality employers training awareness campaign (media, conferences, publications) 	To create better awareness and understanding about the needs and importance of continuous on-the-job staff training. “Training staff is an investment, not a cost”	3 months	NTO/HRD	Trade Associations Trade Magazines	ESF – HRDOP	Initial campaign complete by mid 2009
	Upgrading supervisory and management skills Train supervisors on in-house on-the-job training techniques Upgrading operational skills for middle management level	<ul style="list-style-type: none"> Train-the-trainer mobile training team (TA Expert) Development multidisciplinary course programme (TA Expert + Mobile Trainers) Curriculum and course material development (TA Expert + 	Better supervised staff is happier staff and happier staff is better staff providing better quality of services Only part of the staff needs to be pre-trained. Unskilled staff can be trained on-the-job by supervisors	3 years	NTO/HRD or MHTF +TA	Trade Associations Private sector	ESF – HRDOP	Programme launched by end 2008

PRIORITY – SHORT TERM								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
		Mobile Trainers) <ul style="list-style-type: none"> Programme marketing, PR and organisation (NTO/HRD or MHTF) Programme implementation (Mobile Trainers) 	and managers trained on in-house training techniques. Supervisors need upgrading in operational skills to train and supervise staff					
	Upgrading operational skills on a variety of disciplines and subjects	<ul style="list-style-type: none"> Development multidisciplinary course programme (TA Expert + Mobile Trainers) Curriculum and course material development (TA Expert + Mobile Trainers) Programme marketing, PR and organisation (NTO/HRD or MHTF) Programme implementation (Mobile Trainers) 	To improve operational skills in order to provide better quality service in the hospitality and tourism industry. To strengthen the competitive position towards successful and sustainable tourism development.	3 years ongoing	NTO/HRD or MHTF	Trade Associations Private sector	ESF – HRDOP	Programme launched by end 2008
	Upgrading of the existing Tourist Guiding skills and improve the licensing system and requirements for Tourist Guides	<ul style="list-style-type: none"> Develop and implement upgrading course on Tourist Guiding skills (TA Expert) Review the qualification criteria and improve the 	To improve and upgrade the tourist guiding skills of licensed tourist guides	4 months	NTO/HRD +TA	ANAT and trade associations	ESF – HRDOP	5 courses run by end 2008

PRIORITY – SHORT TERM								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
		<p>existing registration and licensing requirements for Tourist Guides (TA Expert)</p> <ul style="list-style-type: none"> Improve the existing tourist guide training by integrating the specific tour guiding skills in the curricula, according to European standards (TA Expert) 						
	Train new Tourist Information Officers in Tourist Information and Visitor Centre operations	<ul style="list-style-type: none"> New local trainers to train newly recruited TIC staff. 	Providing Information to Tourists is a skill. This includes collection, preparing, producing and displaying tourist information.	1 week courses	NTO/HRD +TA	County and town councils	ESF – HRDOP	First courses run by end 2008
	PRODUCT ENHANCEMENT							
	Caves							
	To provide additional and unusual tourist attractions in areas on touristic circuits	<ul style="list-style-type: none"> Administrators of caves suited to general public visits to develop visitor access, thematic lighting, interpretation and 	To provide additional visit opportunities on tourist circuits and in national parks in order to extend visitor length of	5 years	Cave administrators	Emil Racovita Speleological Institute, Romanian Federation of Speleology	EU-SF ROP 5.2	Four development plans submitted for funding by end 2008

PRIORITY – SHORT TERM								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
		visitor reception facilities	stay and add variety to the visitor experiences on offer					
	Coastal Tourism							
	To avoid piecemeal developments and restore the cohesion of product offer in individual coastal resorts	<ul style="list-style-type: none"> Individual local authorities to develop integrated tourism development plans geared to current and future market needs and to the extension of the season 	Resorts need to establish a clear direction for all their component businesses in order to overcome the current low standards resulting from a fragmented approach	1 year	Local authorities	County Council	Own resources	All local authorities have plans by end 2008
	Coastal Tourism							
	To overcome the conflicting interests of operators resulting in an impaired product offer	<ul style="list-style-type: none"> Establish resort management companies to coordinate service provision and quality, provide direction for the resort and improve marketing 	Fragmentation of ownership and conflicting stakeholder interests are currently having a detrimental effect. Collaboration to mutual benefit is necessary for success.	1 year	Local authorities	Resort stakeholders	n/a	Minimum of 3 resort management companies by end 2009
	Cycling							
	To establish the Danube Cycling Route as Romania's first long distance cycling trail	Prepare funding application to: <ul style="list-style-type: none"> Complete mapping, and route description for the Danube 	By establishing Romania's first major cycling route it is intended to identify the country as a cycling	1 year	National Cyclo Tourism Association and NTO	GTZ	EU-SF ROP 5.2	Funding proposal submitted by mid 2008. Implemented

PRIORITY – SHORT TERM								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
		<ul style="list-style-type: none"> trail including publicity material ▪ Complete sign-posting of the route ▪ Research promotional channels to cycling enthusiasts ▪ Undertake a promotional campaign for the Danube Cycling Route 	destination and encourage further trail development					d by end 2009
	Danube Cruises							
	To provide a user-friendly system for advice of ships' manifests	<ul style="list-style-type: none"> ▪ Establish a clearing house for the dissemination of ship and passenger schedules to ports, operators etc. 	Reduction of bureaucracy for cruise operator clients and ability to collect data on visitor traffic	On-going	NTO	Ports authorities, tour and cruise operators	NTO	In place for 2008 season
	Danube Cruises	<ul style="list-style-type: none"> ▪ 						
	To promote repeat visits by Danube Cruise passengers	<ul style="list-style-type: none"> ▪ Despatch follow-up promotional materials to passengers. 	Cruise passengers are prime candidates for longer repeat visits	On-going	NTO	Cruise operators	EU-SF ROP 5.3	In place for 2008 season
	Danube Cruises	<ul style="list-style-type: none"> ▪ 						
	To provide quality ship and visitor reception facilities at all docking points for Danube cruise vessels	<ul style="list-style-type: none"> ▪ Ports and local authorities to prepare and implement port reception and 	Ensure smooth handling of visitors and offer a quality welcome to Romania	2 years	Danube River Ports Administration and Danube Sea Ports	Local authorities	EU-SF ROP 5.2	Funding applications by mid 2008 Implement

PRIORITY – SHORT TERM								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
		access facility plans			Administration (APDF and ADPM) and Ministry of Transport			for 2009 season
	Hiking							
	To publicise the considerable opportunities for hiking in Romania and make all requisite information available.	<ul style="list-style-type: none"> ▪ Engage cartographic technical assistance ▪ Implement mapping and data collection for existing trails and make certification of new trails contingent on provision of such data. ▪ Research hiking market. ▪ Develop and implement hiking marketing plan. ▪ Revise certification criteria for trails to include all information, GPS data etc. required for main database. 	By presenting full cartographic and other data on hiking opportunities in advance the full range of opportunities can be promoted to hikers internationally	5 years	NTO and Administrators of nature reserves and national parks	SALVAMONT and local authorities	EU-SF ROP 5.3 and own resources	Existing trails mapped and research complete by end 2008. Marketing campaign for summer 2009.
	MICE							
	Sumit feasibility studies for international conference centres in Bucharest and Constanta	<ul style="list-style-type: none"> ▪ Appoint specialist consultants to research the international 	Bucharest is the only EU capital without a purpose built conference	3 months	Primarii of Bucharest and Constanta	NTO and Romanian Convention Bureau	EU-SP ROP 5.2	Funding request submitted by end

PRIORITY – SHORT TERM								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
	to potential investors	<p>meetings market and identify the optimum size and configuration of conference centres for Bucharest and Constanta</p> <ul style="list-style-type: none"> ▪ Submit feasibility studies, outline design specifications and costs of appropriate centres to potential funders. 	<p>centre capable of handling major international meetings and conventions. Its construction would bring significant additional business to Bucharest and first time visitors to the country. Constanta needs additional attractions to generate off season business for coastal hotels. The local and regional meetings market represents an opportunity for this.</p>					2008
	To attract an increasing share of the itinerant international meetings market to Romania	<ul style="list-style-type: none"> ▪ Agree collaboration between NTA and RCB to upgrade the capacity of the Convention Bureau ▪ Secure technical assistance to set up systems and train Bureau staff in sales research and sales ▪ Produce targeted 	<p>Romania is neglected as a location for international meetings as it has a low profile in the sector. Research and targeted marketing by a neutral agency can make significant inroads into the market</p>	3 years and on-going	NTO	Romanian Convention Bureau	EU-SF ROP 5.3 and own resources	<p>Train joint staff spring 2008.</p> <p>Materials produced by end 2008</p>

PRIORITY – SHORT TERM								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
		sales materials and website						
	Museums and Heritage Attractions							
	To develop museum and heritage attractions to provide best practice visitor interpretation and welcome facilities	<ul style="list-style-type: none"> Provide customer care training to staff 	Museum staff should act as hosts rather than guardians in order to improve visitor satisfaction.	1 day courses	Museum, gallery and heritage attraction directors	Ministry of Culture and Cults, County Councils, NTO	ESF - HRDOP	Initial training complete by mid 2008
	Salt Mines							
	To enhance the visitor appeal and facilities at salt mines in order to increase the range of attractions and local business	<ul style="list-style-type: none"> Implement Praid mine development project including visitor reception facilities, mine visit experience and marketing Develop feasibility studies and business plans for other accessible mines and secure donor and/or commercial investors 	Salt mines are both beneficial treatment centre and attractive 'alternative' visitor attractions with the potential to increase visitor stays	5 years	Salrom	County Councils and local authorities	EU-SF ROP 5.2	At least one mine refurbished by end 2009. Two more by end 2013.
	Spa Resorts							
	Assist spa resorts and owners identify product development requirements and advise market potential	Publish and present market research to the spa industry and resorts	By quantifying market demand and product needs spa owners and resorts can make reasoned development and	1 month	NTO	Spa Owners Association and local authorities	NTO	Spring 2008

PRIORITY – SHORT TERM								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
			marketing plans					
	Eradicate confusion over responsibility for public spa facility maintenance and distribution	Clarify spa water concessionaire obligations and standardise distribution procedures and public access	Ensure the focal point of spa resorts – the natural springs – are maintained in a proper manner – both aesthetically and financially	3 months	Ministry of Environment Sustainable Development / National Agency for Mineral Resources	NTO and Spa Owners Association and local authorities	n/a	Spring 2008
	INFORMATION SERVICES							
	Signage							
	Introduce a uniform national brown tourism road sign scheme	<ul style="list-style-type: none"> Establish national criteria for brown tourism road signs (TA assistance) and issue guidelines to local authorities 	Tourism signage both facilitates tourist orientation and encourages additional visits. Avoidance of localise styles is desirable.	1 year	Ministry of Transport – Romanian National Company of Motorways and National Roads	NTO	EU-SF ROP 5.2	Guidelines complete by end 2008
	STATISTICS AND RESEARCH							
	Market Research							
	Put in place a rolling programme of market research to include both one-off and regular activities	<ul style="list-style-type: none"> Conduct continual, seasonal, or annual visitor arrival/departure/ expenditure and satisfaction surveys 	To monitor visitor arrivals/expenditure / motivation/ attitude and satisfaction from their visit experience within Romania	On-going	NTO/RNIS	Border Police NIRDT	Own resources	First studies in 2008
		<ul style="list-style-type: none"> Conduct 	To monitor the	On-going	NTO	NIRDT	Own	First

PRIORITY – SHORT TERM								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
		evaluation of trade fair/exhibition attendance	costs and benefits of participation in these activities				resources	studies in 2008
		<ul style="list-style-type: none"> Commence a programme of planned market research targeting identified national markets and market segments 	To become aware of market trends and opportunities that will inform future marketing and development strategy	On-going	NTO	NIRDT	Own resource	First studies in 2008
	Assessment of the potential in key target market segments and identification of marketing strategy, positioning and programme of activities to realise this potential.	<ul style="list-style-type: none"> Study of key primary and opportunity international markets. Particular attention to be paid to the youth tourism market segment. 	To provide detailed specification of the market opportunities for Romania's tourism and how best to exploit these to maximum benefit for the country	3 years – on basis of 3 a year	NTO	All private sector associations	Own resources	3 studies completed per year
	DESTINATION MARKETING							
	To equip travel industry personnel in international source markets with sufficient product knowledge and confidence to "sell" Romania to the travelling public	<ul style="list-style-type: none"> Design and operate a series of familiarisation visits to Romania's tourist attractions and facilities for groups of personnel from tour operators 	There is a need to increase awareness of Romania's tourism product offering among the travel industry personnel of international source markets	Immediate and ongoing	NTO and its offices abroad	Private sector associations and individual operators (i.e. transport companies, travel organisers, hotels/ and resorts)	NTO budget and in-kind by private sector	Inclusion of Romania in 10 additional operators' programmes by 2009

PRIORITY – SHORT TERM								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
		and travel agents from primary international markets						
	To generate positive media coverage of Romania's tourist attractions and facilities through editorial features in general interest and special travel and tourism publications, television etc.	<ul style="list-style-type: none"> Stimulate, support and facilitate media visits to Romania 	As part of the image building activities for the country, there needs to be a series of articles and features that come in front of, and influence, the travelling public	Immediate and ongoing	NTO and its offices abroad	Private sector associations and individual operators (i.e. transport companies, travel organisers, hotels and resorts)	NTO budget and in-kind by private sector	Tripling of editorial coverage 2008 over 2007
	ENVIRONMENT							
	To remove unsightly and unhealthy waste	<ul style="list-style-type: none"> Introduce a national 'Keep Romania Clean' campaign 	To improve the image of Romania	1 year	Ministry of Environment and Sustainable Development	County and local authorities	Own resources	Campaign launched by end 2008.
	INVESTMENT POLICY							
	Skills Development							
	Skills development for new NTO investment advisory staff	Course or short courses for 8 new investment advisory staff	To introduce tourism market and development appreciation and skills development for investment advice	8 x 5 days	NTO	UNDP	ESF - HRDOP	All staff trained by mid 2008

PRIORITY - MEDIUM TERM								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
	HUMAN RESOURCE DEVELOPMENT							
	Tourism Awareness	“ROMWELCOME” programme						
	Integrate tourism awareness in primary and secondary school curriculum	<ul style="list-style-type: none"> ▪ Organise a series of pilot seminars for primary school teachers on integrating hospitality and tourism awareness in school curricula (TA Expert + Mobile Trainers) ▪ Develop and distribute teachers manuals for primary and secondary schools (TA Expert + Mobile Trainers) ▪ Develop and distribute hospitality and tourism industry career opportunities brochures for pupils (TA Expert) ▪ Launch “Follow the right steps towards a career in hospitality and tourism” programme (TA Expert) 	<p>Public hospitality and tourism awareness should start as early as possible, at primary school.</p> <p>To provide information about job and career opportunities at all secondary schools.</p>	3 months	NTO + HRD TA	Ministry of Education, Research and Youth	ESF - HRDOP	School curricula adapted

PRIORITY - MEDIUM TERM								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
	Develop public tourism awareness	<ul style="list-style-type: none"> Develop and implement a number of public tourism awareness campaigns (TA Expert) 	It is important for the public to understand hospitality and tourism and appreciate the importance and benefits for the country and its economy.	2 years	NTO/HRD or MHTF +TA	Government County and City Councils	ESF - HRDOP	First public campaign run by end 2008
	HRD Organisation and Coordination							
	Introduce a Hospitality Training Levy	<ul style="list-style-type: none"> Introduce a Hospitality Training Levy by 2010 	European Structural Funds are useful to catch up, but are not sustainable. A Hospitality Training Levy Fund ensures sustainable funding of training efforts.	-	MIMMC-TPL, NTO or independent Trust Fund	Private sector associations	Own resources	Legislation by mid 2009
	Spa resorts							
	Provide professional service levels in spa resorts	Develop vocational training courses for spa treatment staff featuring nursing, guest relations, beauty treatments and wellness techniques	Upgrade current staff skills and develop new staff to welcome guests rather than "patients"	5 years	Spa owners and operators	NTO HRD Dept	ESF - HRDOP	First courses by end 2008

PRIORITY - MEDIUM TERM								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
	PRODUCT ENHANCEMENT							
	Museums and Heritage Attractions							
	To develop museum and heritage attractions to provide best practice visitor interpretation and welcome facilities	<ul style="list-style-type: none"> ▪ Introduce innovative presentation techniques ▪ Provide catering facilities where applicable ▪ Expand retail operations 	Heritage attraction and museum visitors are seeking a fuller experience than a purely visit. A warmer welcome, better interpretation and facilities increases visitor appeal and generates more visitors and income.	3 years	Museum, gallery and heritage attraction directors	Ministry of Culture and Religious Affairs, County Councils, NTO	EU-SF ROP 5.2 and own resources	5 museums renovated by end 2009. 10 more by end 2013.
	Spa Resorts							
	Targeted marketing of spa resorts in foreign markets	Development of international marketing campaign to spa users and intermediaries for "export ready" spa resorts – including collateral materials, media visits, romaniatourism website feature, etc.	Based on researched product needs and market segments launch the Romanian spa resort product range in appropriate markets	3 years	NTO	Spa Owners Association	EU-SF ROP 5.3	First campaign by end 2008
	Upgrade accommodation, treatment facilities and resorts to meet market	Upgrade hotels, modernise treatment facilities, introduce new wellness and beauty	Match product offer to identified market needs	5 years	Spa owners and operators	Spa resort Primars	Own resources	20 major projects by 2013

PRIORITY - MEDIUM TERM								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
	needs	facilities						
	Upgrade resort facilities and attractions	Upgrade resort infrastructure in public area, provide entertainment and activities for visitors and inform visitors of attractions of region around the resort	Broaden the appeal of the destination beyond specific spa treatments so as to attract a wider range of visitors	5 years	Primars of Spa resorts	Spa owners and operators	EU-SF ROP 5.2	10 funding requests by 2010
	Winter Sports							
	Improve utilisation of winter sports facilities in traditional low season	<ul style="list-style-type: none"> Stagger February school holidays over two or more weeks 	Create an opportunity for Winter sports resorts to attract new clients and improve facility utilisation	1 year	Ministry of Education	NTO	n/a	Staggered holidays by 2009
	INFORMATION SERVICES							
	Signage							
	Devolve implementation of signage system to county and local levels	<ul style="list-style-type: none"> Develop plans and requirements for brown tourism signs for all roads together with costs 	Local authorities are best placed to identify local needs and develop plans based on local knowledge	3 years	County Councils	Ministry of Transport – Romanian National Company for Motorways and National Roads	n/a	10 counties by end 2009 All by 2010
	Secure majority grant funding for initial installation of signage to "public" locations	<ul style="list-style-type: none"> Secure funding towards costs of implementation of signage proposals 	The initial requirement for signs is large and beyond annual budgets	6 years	County Councils	RDAs & Ministry of Transport	EU-SF ROP 5.2	30 requests made by end 2010
	Secure private sector funding for signage to	<ul style="list-style-type: none"> Disseminate criteria and 	Reduction in "fly" posting of signs to	10 years	County Councils	Private sector operators	Private sector	System operating by

PRIORITY - MEDIUM TERM								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
	commercial tourism products and services	application materials to private sector tourism operators	private tourism businesses and reduction in signage costs to public					2012
	STATISTICS AND RESEARCH							
	Market research							
	Put in place a rolling programme of market research to include both one-off and regular activities	<ul style="list-style-type: none"> ▪ Undertake ad-hoc research activities as particular needs or opportunities arise 	To enable NTO to respond to unforeseen changes or opportunities in the marketing environment	On-going	NTO	NIRDT	Own Resources	First studies in 2008
	ENVIRONMENT							
	Establish a 'Romania Inflorita' competition	<ul style="list-style-type: none"> ▪ Commission a methodology for the establishment of a competition to encourage tidy, colourful and flower-full towns and villages ▪ Launch the 'Romania Inflorita' competition ▪ Secure sponsorship for its continued operation 	Such competitions are proven to decrease litter, increase civic pride and provide an attractive image to the destination	3 years	NTA	Ministry of Environment and Sustainable Development, County and local authorities	Donors initially. Corporate sponsors thereafter	Study complete by mid 2008. Competition launched for 2009.

PRIORITY - MEDIUM TERM								
No	Discipline / Objective	Action	Rationale	Duration	Lead	Partners	Funding	Success Criteria
	INVESTMENT POLICY							
	Investment Forum							
	Attract domestic and international investment into the Romanian tourism sector	Organise the first National Tourism Investment Fair/Forum in Romania	To bring potential investors to meet with the promoters of project opportunities to assist the development of Romanian tourism	2 days	NTO	UNDP RDA's Chambers of Commerce	Own Resources EU-SF ROP 5.3	Forum staged 2009