

THE TOURISM DEVELOPMENT STRATEGY OF THE NORTH-EAST REGION OF ROMANIA. MYTH OR REALITY?

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ABSTRACT – Tourism development strategies play an increasingly important role, representing parts of those documents that aim to socio-economic development, undertaken at local, zonal, county, regional, or national level. Frequently, tourism is viewed as one the best solutions for economic recovery, but without a detailed and realistic analysis of what territory offers from this point of view, this new trend for resolving the economic dysfunctions remains at a mirage level. The North-East Development Region of Romania, the fifth less developed region of the European Union, with a GDP per capita (in purchasing power standard) that amounted to only 34% of the EU-28 average in 2013, rushes to come with a tourism development strategy relying on “*relief and environmental factors, diversity and beauty of landscape, cultural heritage*”, strengthening the specific offers relying especially on mountain, cultural, and religious tourism. The present study uses multiple research methods (quantitative and qualitative analysis, synthesis, graphical and cartographical representation of data, comparison) in order to establish the reliability of the concerned document and to provide solid arguments for the type of tourism that has the largest premises of affirmation in each county of the North-East Region of Romania.

Keywords: tourism development strategy, mineral water springs, health tourism, transport infrastructure, tourist arrivals, North-East Development Region

INTRODUCTION

The main goal of the paper is to establish the degree of reliability of the tourism development strategy of the North-East Region of Romania as included in the North-East Regional Action Plan for Tourism 2008-2013 (2010). To achieve that, several objectives are emphasized: analysis of the natural heritage for tourism purposes, analysis of the tourist material base and tourist circulation, analysis of the development strategy's objectives and their correlation with the existent tourist heritage.

Regarding the analysis of the potential of the natural heritage for tourism, authentic elements were taken into account, which have a decisive role in region's tourism. Thereby, besides cultural, ethnographic, religious, and mountain tourist attractions, the number and the chemical typology of mineral water springs in the North-East Region were also reviewed. Subsequently, the accessibility level was estimated for those settlements that have this kind of resources.

The analysis of the tourist material base in the North-East Region pointed out the total number of accommodation structures and the accommodation capacity in each county. The same kind of analysis was made for tourist circulation, which revealed the total tourist overnights and arrivals for each county of the region under analysis.

All these analyses were conducted to establish whether the tourism development strategy of the North-East Region of Romania is sustainable and whether health tourism has any chance to prove

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something in the region's counties, considering the number, the chemical typology, the territorial distribution, the level of transport accessibility to mineral water springs and the tourist infrastructure.

A sustainable strategy provides a “development that meets the needs of current generations without compromising the ability of future generations to meet their own needs” (WCED, 1987, p. 45). Moreover, a sustainable strategy presents real, achievable actions that are realised in accordance with the resources of the territory. Without the elaboration of a sustainable strategy, dysfunctions in terms of environmental, economic and social issues will not delay to appear: conflicts between tourists and local community (Snyder and Sulle, 2011), widening socio-economic inequalities (Hunt, 2011), loss of traditional sources of income such as agriculture (Sahli and Nowak, 2007), economic leakage (Dwyer and Thomas, 2012), environmental degradation (Gossling, 2002). In terms of tourism development strategies, a sustainable one, besides the analysis of environmental (Hunter, 1997; Garrod and Fyall, 1998; Weaver, 2006), economic (Hunter, 1997) and social factors (Vellas and Becherel, 1999), it must provide a tourism development in accordance with the resources of the respective territory.

The paper represents a bold and critical approach on the tourism development strategy of the North-East Region by presenting several arguments against the efficiency of this document, which prove that its objectives are not compliant with the available resources if taking into account the number and diversity of mineral water springs in the territory and the type of tourism that was recommended as a priority.

The region under study is located in north-east Romania and it borders Ukraine to the north, Galați and Vrancea counties to the south, Republic of Moldova to the east and the counties of Maramureș, Bistrița-Năsăud, Mureș, Harghita, and Covasna to the west (Figure 1).

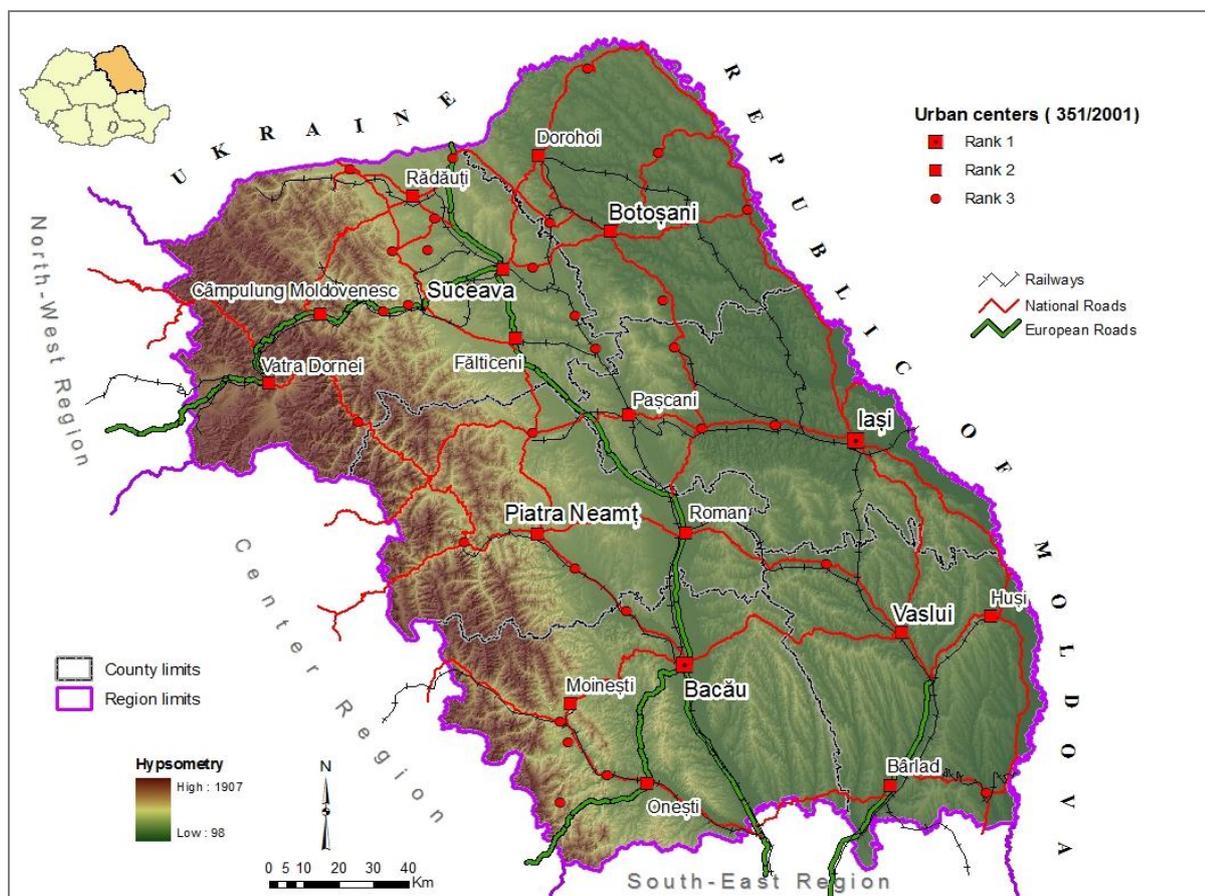


Figure 1. North-East Development Region of Romania

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The natural potential is characterized by a diversified relief (30% mountains, 30% Sub-Carpathians, 40% hills), mountain and hill climate, a dense river network which includes the Siret River basin (43,000 km²) and the Prut River basin (11,000 km) and different soil and underground resources (mineral water springs and building materials: limestone, clay, sandstone, gypsum and sand). It has a population of 3.5 million inhabitants, an area of 36,850 km² and a mostly agriculture-based economy. The regional GDP per capita is the lowest in Romania and one of the lowest in the EU.

The North-East Region, like the other seven development regions of Romania, does not have an administrative status and does not have legal personality. According to Law 315/2004, it represents “the framework for the elaboration, implementation and evaluation of the regional development policy, and for collecting the specific statistical data according to EU regulations issued by EUROSTAT for NUTS 2 level territorial classification available in the EU” (Chapter 2, Art. 6.3).

Just like the global trend, the North-East Region tries to pay increasing importance to the tourism phenomenon which relies on the mountain landscape, the monasteries in Suceava and Neamț counties, the urban culture in the cities of Iași, Bacău, Botoșani and Vaslui, and the region’s rural civilization. The current strategy is focused on the development and modernization of the tourist accommodation establishments and facilities, the encouragement of new investments, promotion of the tourism potential, and development of agritourism, whereas health tourism is situated at the end of top priorities (after the religious, cultural, historical, mountain, transit, or weekend tourism).

THEORETICAL BACKGROUND

The present study supports the idea that the current tourism development strategy of the North-East Region is not a sustainable one, because the analysis of tourist potential is incomplete and does not reveal some of the most eloquent aspects of tourism.

The most relevant studies on the sustainable tourism development strategies provide a detailed quantitative and qualitative analysis of tourism components, these representing the foundation on which the measures for the development of this phenomenon are grafted. One relevant example is a study conducted by Fletcher and Cooper in 1996, in which the strategy was elaborated after the analysis of entire tourism potential, exogenous and endogenous conditionings, opportunities and threats. In 2002, Cho came up with a tourism redevelopment strategy, with the case of Kanhwon Land Resort Casino, where an in-depth analysis of the urban community, local economy, foreign exchange earnings, tax revenues, job creation was considered necessary. Taking into account the dimension of the study area, Cho’s area is diametrically opposed with the one analysed in our paper, but a detailed observation was considered compulsory (Cho, 2002). Another relevant example is the study conducted by Tony Binns and Etienne Nell (2002) on South Africa, where, for initiating such an action, they made an in-depth analysis on the economic, social, and environmental resources, but also on local government efforts.

In 2007, the same analysis of natural, economic, and social resources can be found in Calum Macleod and Rune Todnem’ study on the sustainable tourism strategy for Scotland, where they follow a low impact on the environment and local culture, while helping to generate income, employment and the conservation of local eco-systems (Macleod and Todnem, 2007).

In 2010, Julia Nina Albrecht examined the implementation of a tourism development strategy in peripheral areas. She chose Steward Island of New Zealand as the case study, facing with problems such as addiction to natural resources and unskilled staff. Besides the analysis of the entire tourism potential, the strategy emphasized also the main stakeholders and their roles, the support of the local government and its relationship stability with stakeholders and local community, the management of protected areas, and the involvement of volunteers (Albrecht, 2010).

In 2013, Liyanag and Jayawardena managed to elaborate a tourism development strategy after the civil war in Sri Lanka, capable of changing the negative perceptions of potential tourists, after the previous positioning statement – “Land like no other” – had become ineffective. Therefore, the authors aim for this destination to obtain a desirable and distinct position in consumers’ mind so that to become a brand which can be evaluated by them. To make an effective strategy, the authors went through five

steps: identification of consumer's profile in whose mind the destination intends to position its offering, those who sell the tourist product must understand the mental category or reference frame of consumer, they must take into account the competitors who provide the same or almost the same services and must establish differentiation measures. Finally, the marketer must develop a mental association network (brand scheme), that the consumer can easily memorize and differentiate. An eloquent example is Sri Lanka's tourism brand schema (Figure 2), made to highlight the real, demonstrative, sustaining attributes of this destination. Thus, through a well-done strategy, they revealed the realistic tourism image of this country.

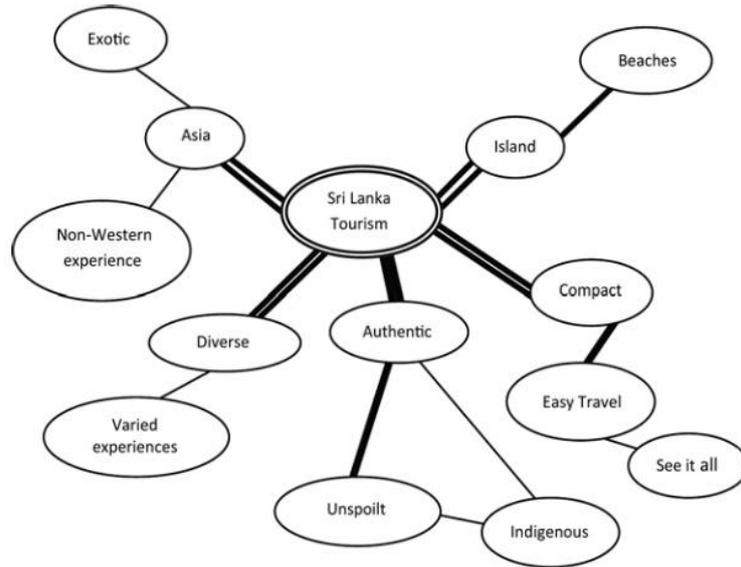


Figure 2. Sri Lanka's tourism brand schema
Source: Liyanag and Jayawardena, 2013

In 2014, Rowen considered that a deep analysis is needed inside cultural and territorial politics in order to create a tourism strategy. Moreover, he assumed that tourism should be viewed as a technology of state territorialisation, referring „[...] to those practices and processes by which space is rendered or configured as belonging to, bounded by, and subject to the sovereignty of the collective actor imagined as a particular state”. Therefore, the tourism phenomenon is so complex from the structural and functional point of view, that we need to allow for many aspects, and even the smallest mistake done in a strategy (omission, wrong data) might have an upshot to the entire study (Rowen, 2014, p. 66).

METHODOLOGY

Several methods were used in the elaboration process of this research and the most important are quantitative and qualitative analysis, synthesis, observation, comparison, graphical and cartographical representation of data.

The *analysis method* consisted in a realistic approach to tourism potential in terms of the number and chemical composition of mineral water springs in the North-East Region, the number and capacity of accommodation units, tourist traffic (tourist arrivals and tourist overnights) and transport infrastructure - in order to reveal the transport accessibility for each urban or rural settlement with mineral water springs. These stages of analysis followed a logical approach. Thus, after the identification of mineral water springs sources in the case of each county, the tourist arrivals were analysed for the counties of Botoșani, Suceava, Iași, Neamț, Bacău, and Vaslui in order to highlight a general image of the attractiveness of each county. Then, the attention was focused on the accommodation units to reveal whether tourism infrastructure is compliant with the tourist arrivals and tourist overnights in case mineral water springs were introduced in tourist circuit. Because transport accessibility plays an important role in the modern tourist's decision, we took into account the railway and road network, the position and size of airports that facilitate the access to mineral water springs.

Observation allowed the investigation of the tourism development strategy, namely the information provided and the issues the respective strategy insisted on.

The *mathematical method* was used to calculate the transport accessibility to each locality with mineral water springs. In order to calculate the road accessibility, the following features were taken into account: according to distance between each settlement and the closest European road, the ratings were given as follows: three points (0-15 km), two points (15-50 km) and one point (>50 km); 0.5

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points for those settlements which are connected with an European road through a national one, but only in case the distance between the settlement and the European road ranged between 15 and 50 km; the rating decreased for those localities which had a county road as a link and in case the distance between the mineral water springs and the European road ranged between 15 and 50 km; in case the link consisted in a national and a county road, the score remained the same (Gaman, 2014).

In order to calculate the railway accessibility of each settlement with mineral water springs, the following conditions were taken into account: three points were awarded to localities that have access to a primary railway, two points to those that have access to a secondary railway, and no point to those that do not have access to any kind of railway. If the distance between a settlement and the closest railway was less than 30 km, one point was given, but only if the settlement had connections with the railway through European or national roads; if the distance between a rural/urban centre and the closest railway was less than 30 km and had European/national and county road connections, 0.5 points were awarded (Gaman, 2014).

In the case of air accessibility, we took into account the distance to the closest airport and the type of road that makes the connection with the respective airport. The calculations were based on the following: three points were given for the localities situated at a distance of 0-60 km from the closest airport, two points for the localities situated at a distance of 61-100 km from the closest airport, and no point for a distance of 101-120 km. If the distance between the settlements and the closest airport was less than 121 km to these natural resources and had connections through European or national roads 0.5 points were given (Gaman, 2014).

Synthesis was focused on integrating the collected data and information into a unitary assessment to facilitate the achievement of the next step.

Comparison was focused on the examination of related issues by highlighting the differences and similarities between them in each county of the North-East Region.

The *graphical method* consisted in the graphical representation of data under the form of charts (e.g. the numeric evolution of resorts in the North-East Region, compared with the situation at national level).

The *cartographical method* was also used. Cartodiagrams were included to support a comparative analysis between the counties of the North-East Region. In addition, after calculating transport accessibility, a point theme was created by using the ArcGIS 9.3 software, representing locations with mineral water springs and the resulted values were assigned to each point. Subsequently, maps indicating areas of mineral water springs that present a low or a high level of transport accessibility were generated by using Kriging interpolation.

RESULTS AND DISCUSSION

Health tourism is one of the types of tourism with the best premises for development in Romania. This statement is based on the existence of the 3,000 sources of mineral and thermal water springs, on the fact that Romania has many areas with great curative potential that occupy 2/3 of the administrative territory, the high values of Romania's therapeutic factors from which treatments for all kinds of known affections can be conceived and ensured, the medium and high value of the average length of tourist stay (Figure 3), low seasonality whereas the need of health recovery is continuous, with a constant evolution line, and is less dependent or even not dependent on weather conditions. In addition, health tourism addresses the needs of an increasingly number of persons and, moreover, to an increasingly younger tourist segment, because of the more stressful and sedentary lifestyle, the growing need of rest and relaxation, the diverse professional diseases, all these in the context of an increasing standard of living and of an increasing leisure.

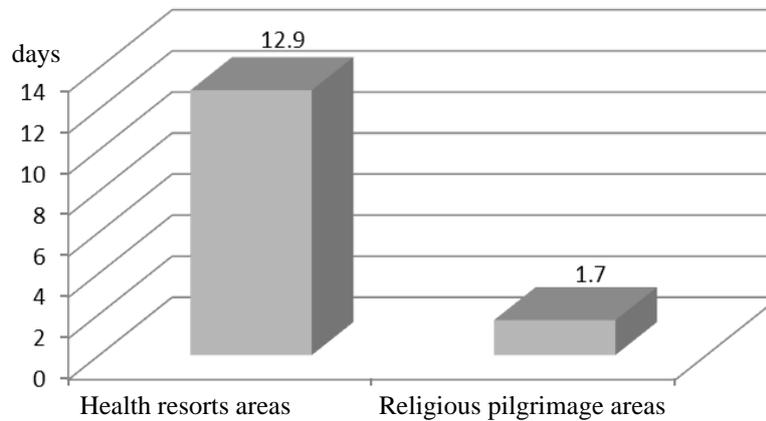


Figure 3. *The average length of stay for tourists who chose health resorts and religious pilgrimage areas in Romania, 2013*
 Source: National Institute of Statistics

Identification of mineral water springs

The identification of the territorial distribution of each source of mineral water springs was based on several studies on Romania’s health resorts and other mineral water springs from 1900 until present. According to Saabner-Tuduri (1906), Țeposu and Pușcariu (1932), Morariu *et al.* (1955), Ștefănescu (1967), Munteanu, Stoicescu and Grigore (1978, 1986), Glăvan (1978), Ghinea (1993), in the North-East Region of Romania there are 237 sources of mineral water springs: 108 in Bacău County, 44 in Suceava County, 41 in Neamț County, 33 in Iași County, 7 in Vaslui County, and 4 in Botoșani County, including the resources located in six health resorts, namely Câmpulung Moldovenesc, Gura Humorului, Vatra Dornei, Bălățești, Târgu Ocna, and Slănic Moldova (Figure 4).

Regarding the localities with this kind of natural resources, Bacău County ranks first with 49 settlements, Suceava with 34, Neamț with 27, Iași with 18, Botoșani with 3, and Vaslui with only 2 rural settlements.

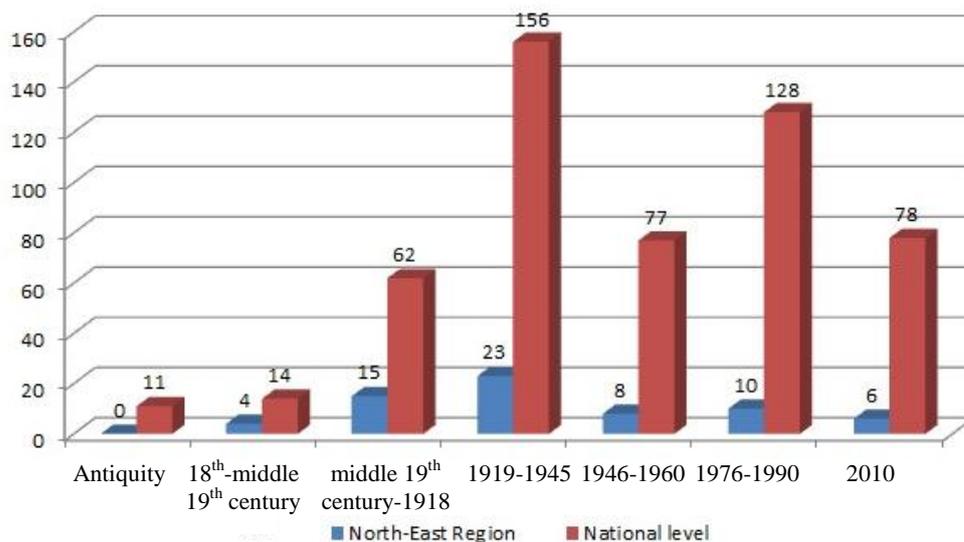


Figure 4. *The numeric evolution of resorts in the North-East Region and in the rest of Romania*
 Source: Saabner-Tuduri (1901, 1906), Țeposu and Pușcariu (1932), Morariu *et al.* (1955), Ștefănescu (1967), Munteanu, Stoicescu and Grigore (1978, 1986), Glăvan (1978), Ghinea (1993), Government Decision No. 852/2008 with subsequent amendments and additions

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As far as the chemical composition of the mineral water springs is concerned, the North-East Region has salty, sulphurous and sulphate, bicarbonate mineral water springs. A number of 54 settlements have salty mineral water springs (most of them are located in Bacău County), 31 localities have sulphurous and sulphate mineral water springs (most of them in Neamț County), 12 urban and rural centres have bicarbonate mineral water springs (most of them in Suceava County), and 31 settlements have unknown sources (Figure 5).

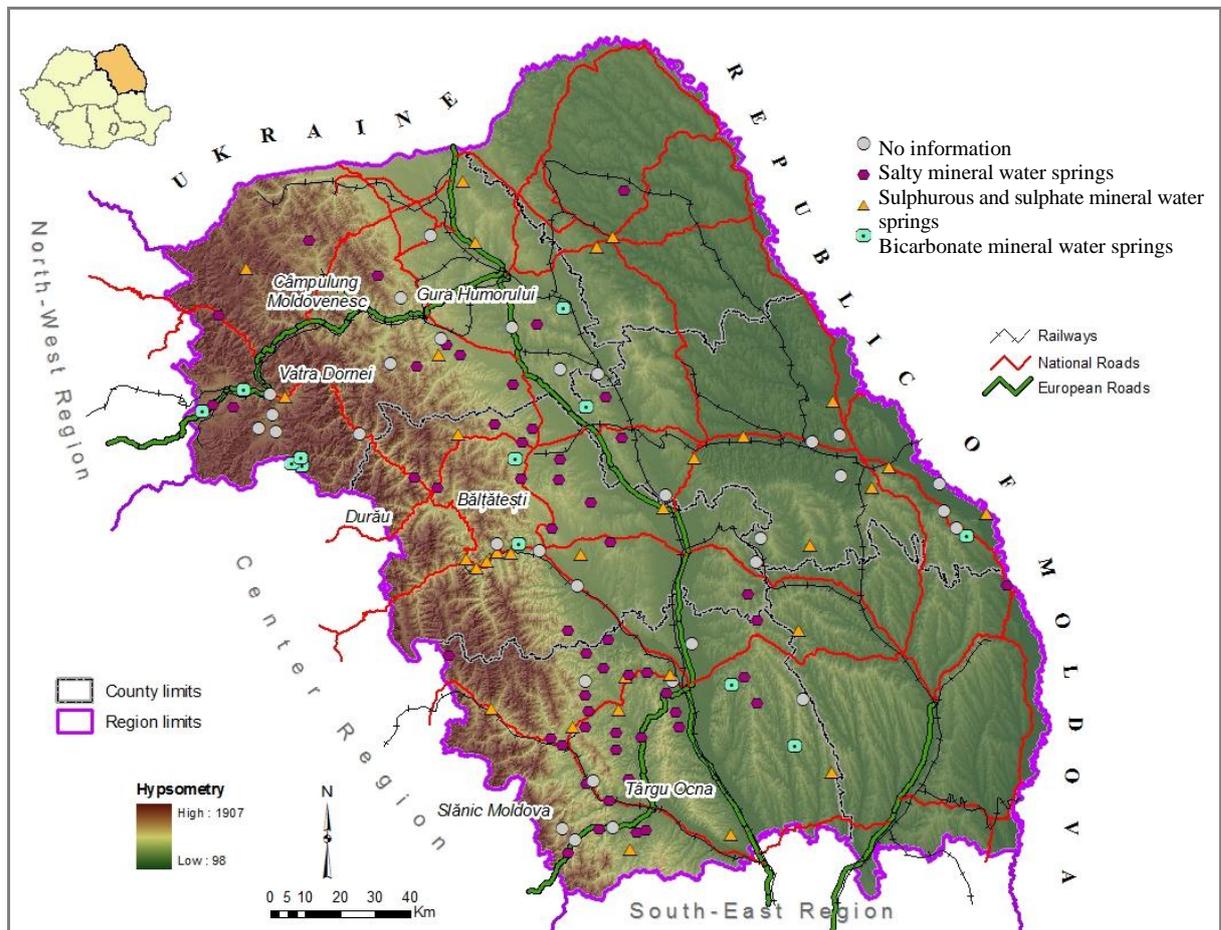


Figure 5. Territorial distribution of settlements with mineral water springs in the North-East Region, regarding their chemical composition

Tourist traffic

Tourist arrivals and tourist overnights were also analysed for each of the six counties in the region, these values being practically the results of all measures taken through tourism phenomenon. According to the National Institute of Statistics database (2013), Suceava was the county that received the highest number of tourist arrivals in 2013 (241,629), followed by Iași (183,305), Neamț (160,707), Bacău (101,826), Vaslui (35,190), and Botoșani (33,349) (Figure 6).

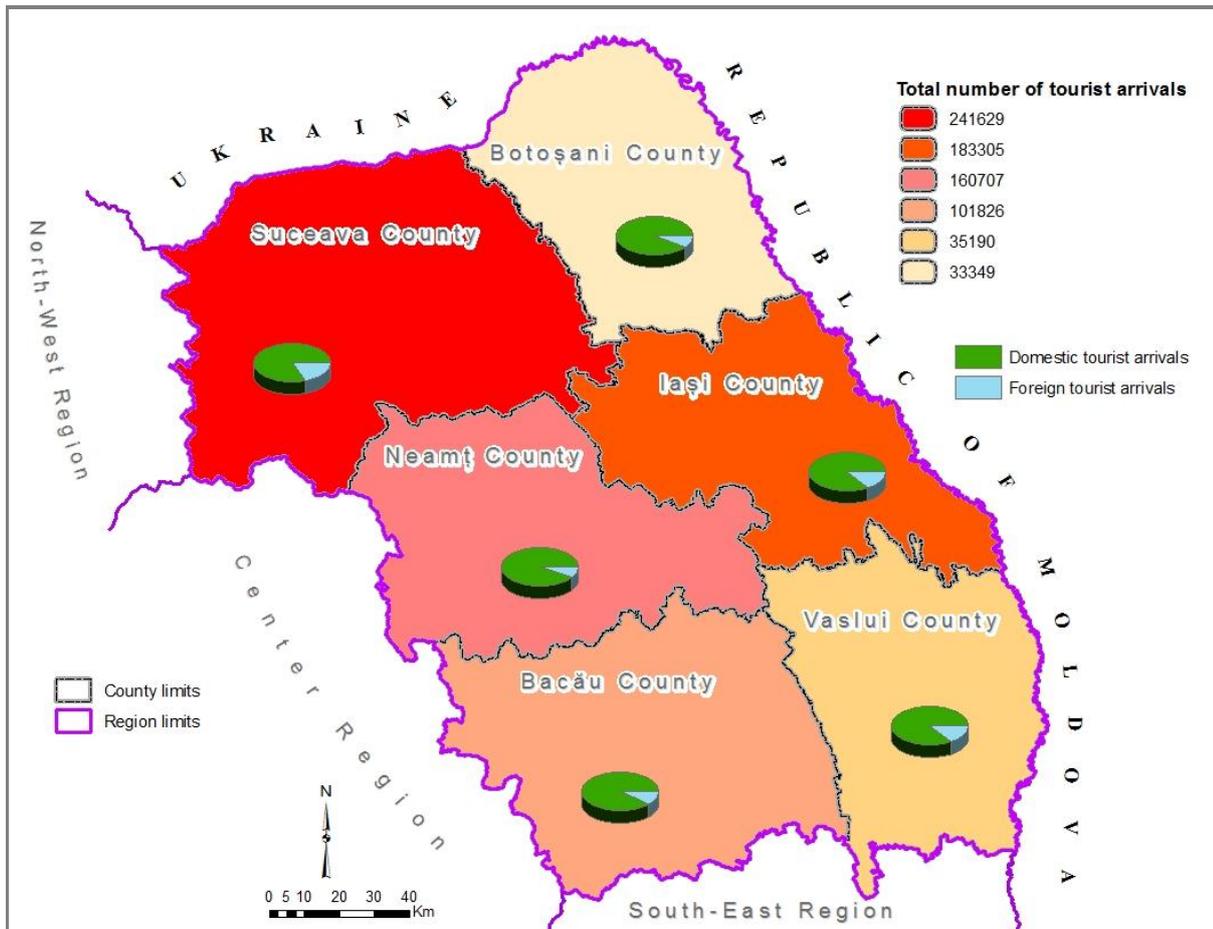


Figure 6. Counties in the North-East Region ranked by total number of tourist arrivals, and the share of domestic and foreign tourist arrivals, 2013

Source: National Institute of Statistics

It can be easily observed that Suceava receives, by far, most of the tourist arrivals in North-East Region due to the mountain area (winter sports) and the orthodox monasteries. The greatest difference is recorded at the end of ranking, where Vaslui and Botoșani counties receive a low number of tourist arrivals due to the poor natural and anthropogenic tourism resources. The same ranking is kept in the case of foreign arrivals, Suceava being the county that receives most of foreign tourist arrivals (almost 40,000) (Figure 6).

The length of tourist stay is measured by tourist overnights and, according to the National Institute of Statistics database (2013), the county that records the greatest number of tourist overnight stays is Suceava (577,232), followed by Iași (356,667), Neamț (294,862), Bacău (265,213), Vaslui (61,570), and Botoșani (58,801). The same ranking is kept in the case of foreign arrivals, Suceava being the county that receives most of foreign tourist arrivals (almost 80,000). However, in this case, Bacău records more foreign overnight stays than Neamț.

Pursuant to these values, the average length of stay in Bacău is 2.60 nights (due to Slănic Moldova and Târgu Ocna resorts, with treatment facilities that attract tourists for longer periods). The average length of stay in Suceava is 2.38 nights, followed by the counties of Iași (1.94), Neamț (1.83), Botoșani (1.76), and Vaslui (1.74).

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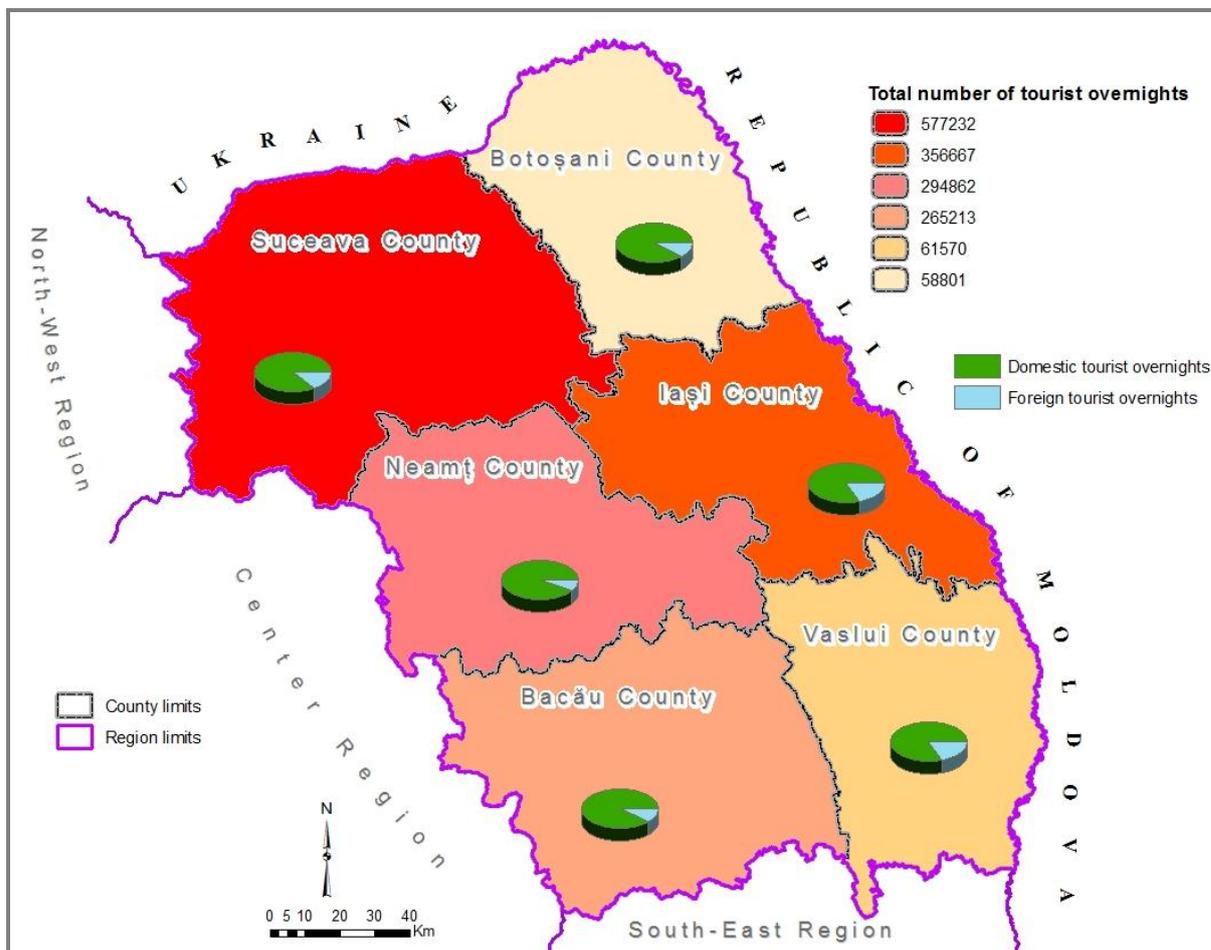


Figure 7. Counties in the North-East Region ranked by total number of tourist overnights, and the share of domestic and foreign tourist overnights, 2013

Source: National Institute of Statistics

Tourist accommodation structures

An analysis of the tourist accommodation establishments in each county of the North-East Region was conducted especially to highlight the degree of occupancy.

According to the National Institute of Statistics (2013), the county with the largest number of accommodation units is Suceava (295), followed by Neamț (213), Bacău (85), Iași (72), Vaslui (42) and, Botoșani (18).

As regards the capacity of the existing tourist accommodation establishments, Suceava is the county that leads the ranking (9,585), followed by Neamț (6,506), Bacău (3,856), Iași (3547), Botoșani (1,103), and Vaslui (897) (Figure 8).

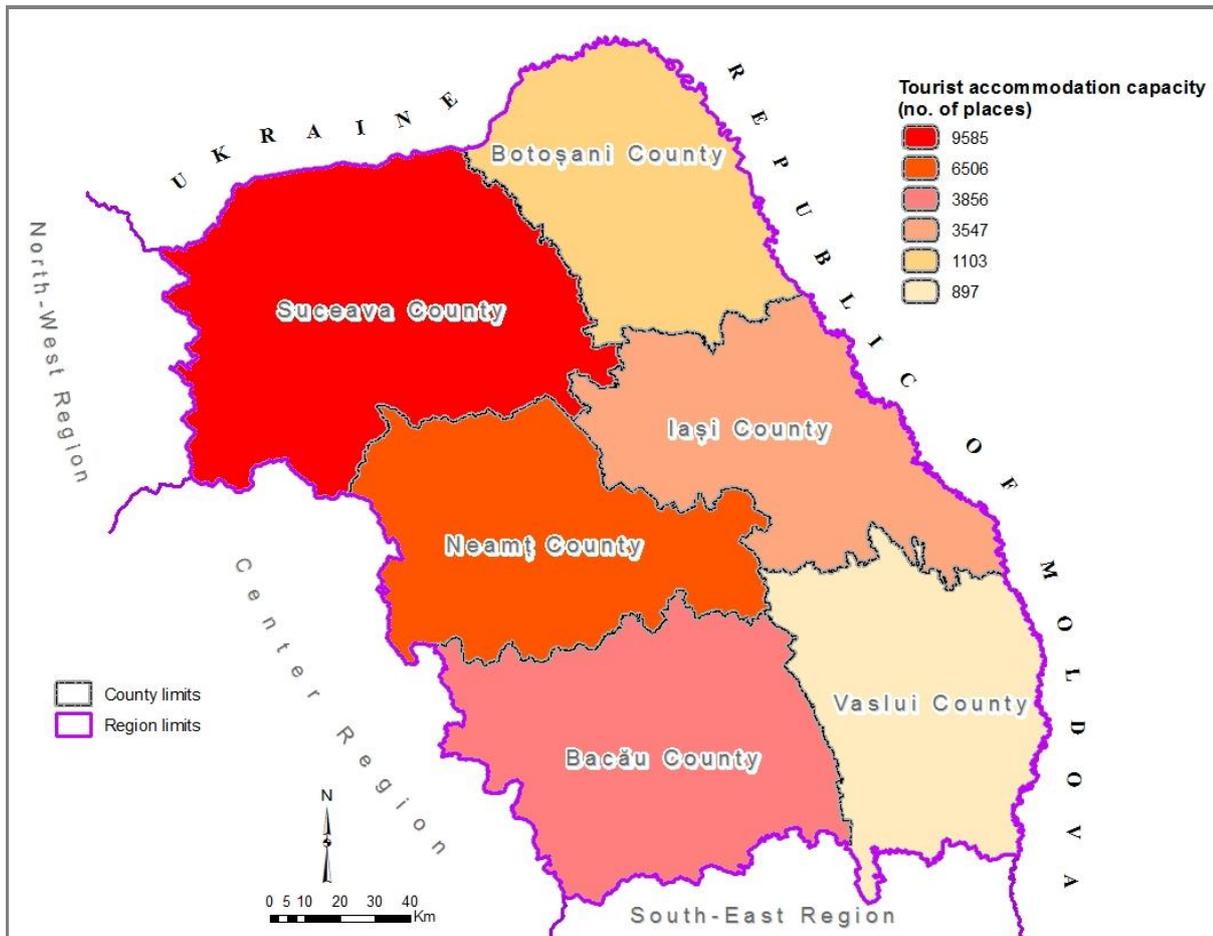


Figure 8. Counties in the North-East Region ranked by total tourist accommodation capacity, 2013
Source: National Institute of Statistics

Regarding the tourist accommodation capacity in function, Suceava County ranks first with 2,642,601 bed places, followed by Neamț (1,772,656), Iași (1,214,466), Bacău (1,190,498), Botoșani (397,615), and Vaslui (312,076).

Based on these values, the capacity utilization rate was calculated, which represents the ratio between total number of tourist overnight stays and the tourist accommodation capacity in function. The results indicate that, Iași County is leading with 29%, followed by Bacău and Suceava with 22%, Vaslui (20%), Neamț (17%), and Botoșani (15%).

Transport accessibility

Transport accessibility took into account road, railway, and aerial accessibility. A map was generated for each type of transport infrastructure, which revealed the level of accessibility (low, average, high). After calculating the geometry of each element, it resulted that Iași County is the most favourable and presents the highest level of transport accessibility. Bacău County ranked second, followed by Suceava, Botoșani, Neamț, and Vaslui.

An impediment for an increased transport accessibility, besides the low quality and quantity of infrastructure (especially in Vaslui and Botoșani counties), is represented by the geomorphological conditions, especially in the western part of Suceava, Neamț, and Bacău counties.

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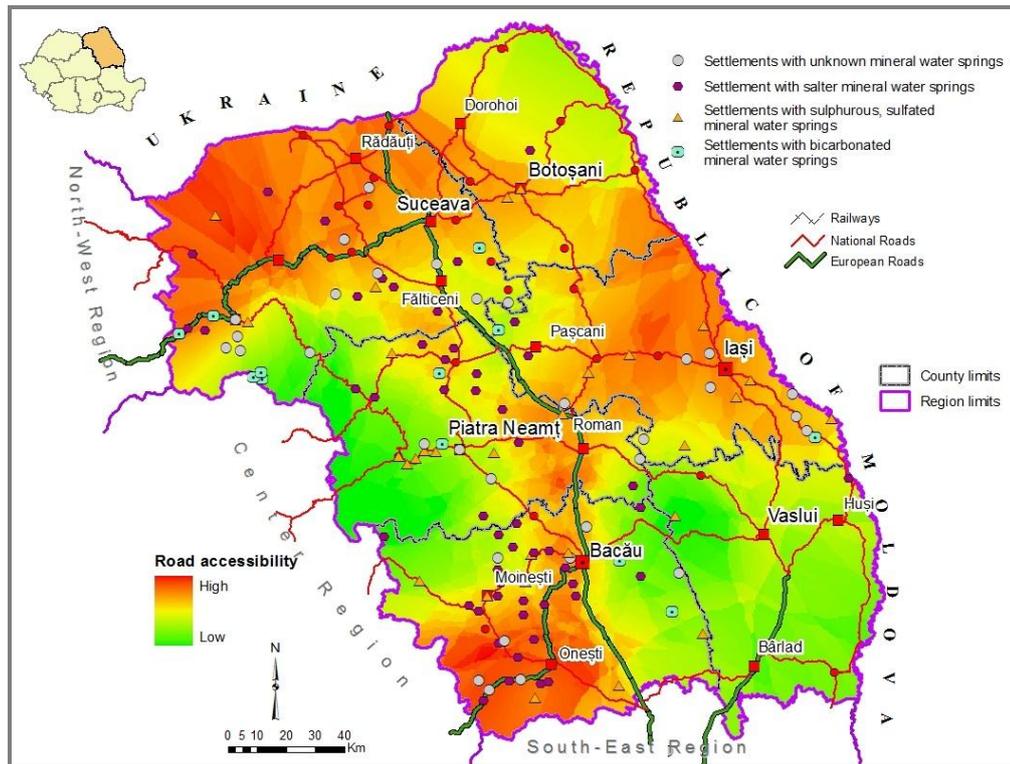


Figure 9. Road accessibility of localities with mineral water springs in the North-East Region

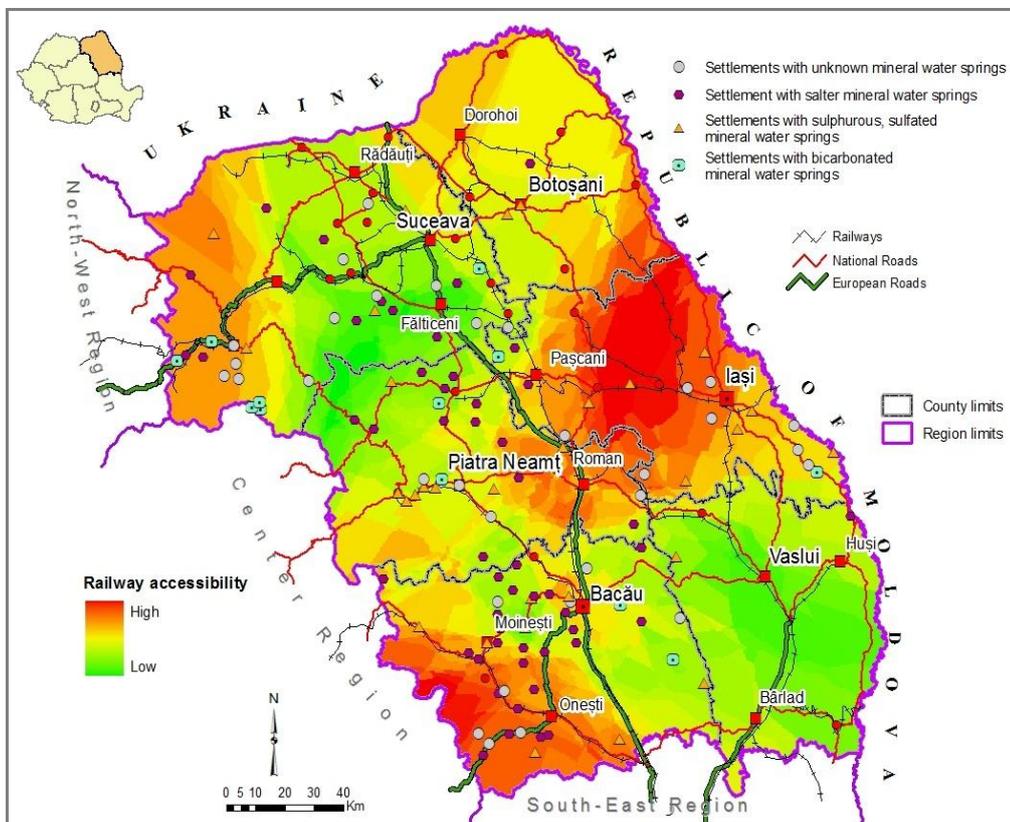


Figure 10. Railway accessibility of localities with mineral water springs in the North-East Region

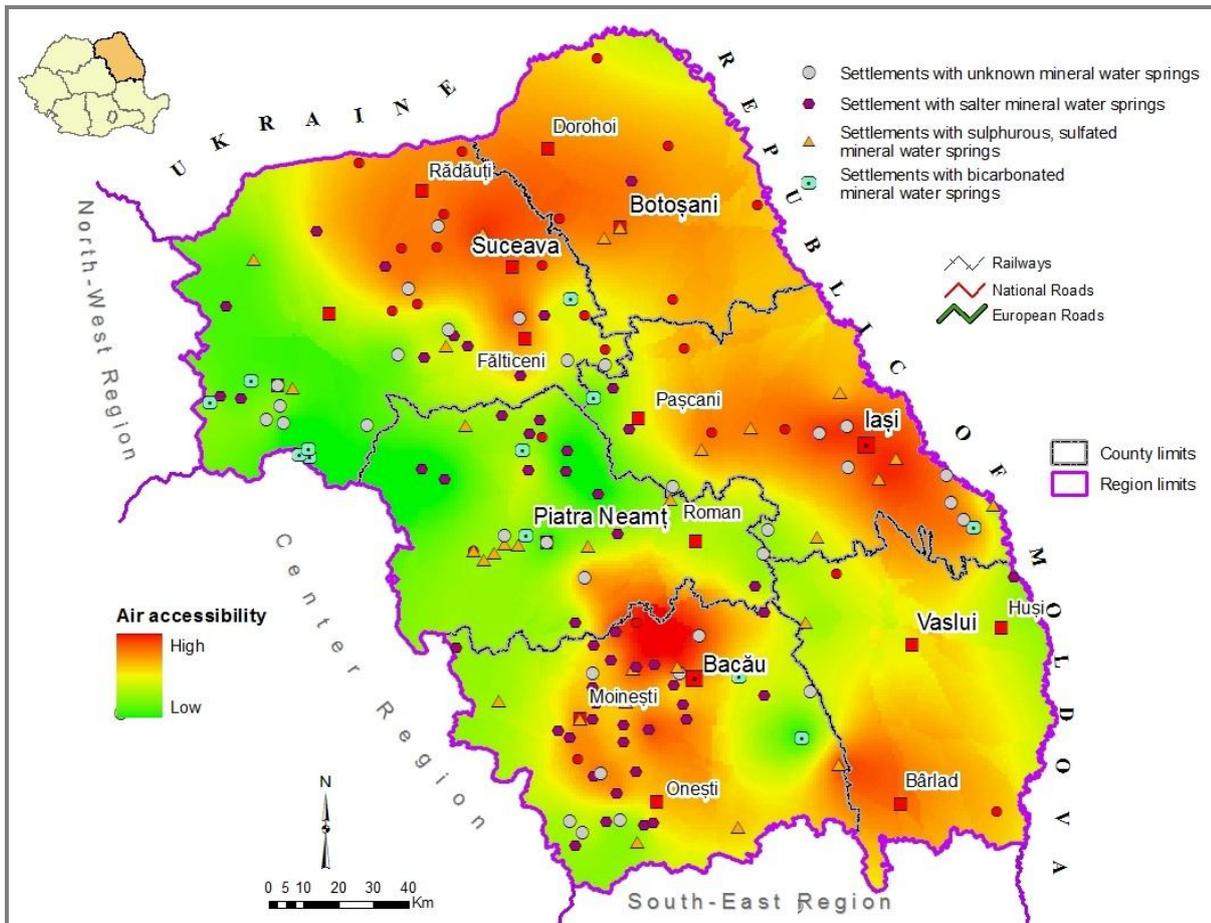


Figure 11. Aerial accessibility of localities with mineral water springs in the North-East Region

Suitability for implementation of health tourism

The results of the indicators analysed above were summarized in the ranking table below (Table 1). Each county was ranked on a six-point scale on each of the 11 indicators, most of them referring to tourism infrastructure and tourist traffic, in order to estimate, in a more roughly way, the suitability for implementation of health tourism in each county.

Table 1. County rankings based on the indicators analysed above

| | Bacău | Botoșani | Iași | Neamț | Suceava | Vaslui |
|--|-------------|-------------|----------|-------------|------------|-------------|
| Number of mineral water springs | 1 | 6 | 4 | 3 | 2 | 5 |
| Settlements with mineral water springs | 1 | 5 | 4 | 3 | 2 | 6 |
| Tourist arrivals | 4 | 6 | 2 | 3 | 1 | 5 |
| Tourist overnight stays | 4 | 6 | 2 | 3 | 1 | 5 |
| Accommodation structures | 3 | 5 | 4 | 2 | 1 | 6 |
| Accommodation capacity | 3 | 5 | 4 | 2 | 1 | 6 |
| Accommodation capacity in function | 4 | 5 | 3 | 2 | 1 | 6 |
| Capacity utilization rate | 2 | 5 | 1 | 4 | 2 | 3 |
| Road accessibility | 3 | 4 | 1 | 5 | 2 | 6 |
| Railway accessibility | 2 | 4 | 1 | 5 | 3 | 6 |
| Aerial accessibility | 2 | 3 | 1 | 6 | 4 | 5 |
| Final result | 2.63 | 4.90 | 3 | 2.45 | 1.8 | 5.36 |

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The final result consisted in an arithmetic mean of each rank obtained by each county for each indicator, the lowest value representing the most favourable situation. Even if Bacău County has the largest number of mineral water springs and the highest number of settlements with such natural resources, after having taken into account the tourism infrastructure, the final result dropped this county on the second place, along with Iași County. Suceava County ranks first, even if the total number of mineral water springs is half the total number of Bacău. Vaslui and Botoșani are less equipped from tourism point of view and have the least number of mineral water springs.

CONCLUSIONS

The present paper aimed to clarify that the current tourism development strategy of the North-East Development Region of Romania fails to make a rigorous and complete presentation of the tourism potential, marginalizing the possibility of improving health tourism. After an in-depth document research, it resulted that this region benefits by 237 sources of mineral water springs, a quantity enough to raise question marks. Moreover, other ten indicators were analysed, that could have an important role in the development of health tourism. At the same time, each county within the region was ranked from 1 to 6 on each of the 11 indicators, and in the end, the counties that present the greatest premises for the development of health tourism were revealed.

This article is addressed especially to the North-East Regional Development Agency to reconsider the latest documents on tourism development and take into account the analyses and findings that could give a precious helping hand to support health tourism.

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