

Aspects of the Tourist Development on the Romanian Black Sea Coastline

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Abstract— Romanian Black Sea coastline stretches over a length of about 240 km, between Ukraine and Bulgaria, from the Danube Delta in north to Vama Veche coastal town, situated on the border with Bulgaria. The coastline is arranged and exploited for tourist purposes only for a distance of about 82 km, from Cape Midia (the North) and to the Bulgarian border (the South) where there are 18 coastal localities of which 13 are tourist resorts of national interest. Most coastal tourist resorts in Romania were developed 4-5 decades ago to meet two important segments of the tourist market: the passive segment (type “sunlust”), consisting in demand for sun and beach and spa tourism segment (of balneotherapy). Currently, both types of products offered are outdated on the European market and they are in decline. With few exceptions, the coastal resorts are characterized, in general, by the presence of tourist facilities specific for the years 1960-1970, with less space allocated for accommodation or panoramic views, with many unattractive buildings for tourists of the 21st century. In addition, over 70% of hotels are classified in the category for one star and two star hotels (2008). In recent years, the Romanian seaside resorts face a reduction in the number of tourists. Tourism offer fails to rise only marginally to the expectations of tourists. The Black Sea shall compete with other new season offers. In this context, it is particularly interesting to analyse the movement of interest for the period 1999-2008. Also the aim is to find out, based on an analysis of marketing, which its growth prospects are. This is especially important, since in the region, there are strong competitors, such as Bulgaria, Croatia, Ukraine, Montenegro and Albania.

Keywords—Black Sea, Romanian littoral tourism, tourist flow.

I. INTRODUCTION

THE Romanian seaside of the Black Sea stretches on a length of approx. 240 km, between Ukraine and Bulgaria, from the Danube Delta, in the North, and the seaside resort

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Vama Veche, located at the border with Bulgaria. This is fitted and exploited for tourist purposes only on a distance of approx. 82 km, from Cape Midia (in the North) and up to the border with Bulgaria (in the South), area where there are 18 seaside localities, among which 13 are tourist resorts of national interest [1].

The attractiveness of the Romanian seaside is given by the orientation of the beaches towards the east and the south-east, with almost 10 hours of sunlight per day, the light slopes of the beaches, the shallow waters around the shore, sand with fine granulation, the reduced salinity of the water, very small tides, the lack of strong currents, the constant presence of the marine aerosols. The bioclimate is temperate-continental, with few marine influences, with reduced thermic changes in 24 hours, good thermic stability in the summer season, reduced precipitations, uniform degree of atmospheric humidity. The seaside is identified by the two distinct sectors: the north sector, between Sulina - Cape Midia, and the south sector, between Cape Midia and Vama Veche [2].

In Mangalia there are mineral water springs, predominantly sulphurous, or organic mud in the seaside lakes. On the coastal space there are a series of natural reservations - Hagieni Forest with 392.90 ha, Limanu Cave, Movile Cave, the Marine Aquarium from Vama Veche - 2 Mai with 5000 ha and 7 km long. An interesting aspect of the coastal area is the presence of more maritime and river lakes and lagoons, with fresh water, scattered along the seaside, separated by narrow stripes of land, some having mud with therapeutic value - Siutghiol, Tatlageac, Techirghiol. The aquatic surfaces of these lakes constitute ways of diversifying the nautical leisure activities.

Together with these, from a cultural point of view, there are various museums, monuments and artistic activities - The National Museum of Archaeology, Mosques, Saint Peter and Paul's Orthodox Cathedral, the annual celebration of the Day of the Navy (August 15th) from Constanta, the Museum of the Navy, Esmahan Sultan Mosque, Callatis Festival from Mangalia, Saint Mary's Monastery, The Light Music Children's Festival "Glasul Sperantelor" from Techirghiol etc.

The majority of the seaside tourist resorts from Romania were built 5 or 6 years ago in order to satisfy two of the more important segments of the tourist market: the passive segment, of the "sunlust" type, consisting of the request for sun and beach, and the spa tourism (treatments and therapy). At the

present moment, both types of products offered are outdated on the European market and they are in decline.

With a few exceptions, the seaside resorts are generally characterised by the presence of the tourist accommodation structures of the 1960s-1970s, with less space allotted for other fittings or panoramic views, with the numerous unattractive buildings, from an aesthetic point of view, for the tourists of the 21st century. Moreover, over 70% of the hotels are classified at the one star and two star categories (2008).

The oldest resorts are: Eforie Nord, from 1901, when the spa pavilion was built and Techirghiol, located on the lake with the same name, near the seaside, founded in 1909, followed by Eforie Sud. The newest localities that entered the tourist circuit after 1990, are Limanu, Tuzla, 23 August on the shore of the Tatlageac lake.

II. THE CURRENT STATUS OF THE TOURIST FLOW

The manner in which the entire tourist potential is revaluated, but also the accommodation units are evaluated through the tourist flows recorded. In this context, the tourist flow shows the actual request under different actions and it is analysed by three main indicators: tourist arrivals, overnight stays in the accommodation units, the degree of occupation and the average duration of the stay. The most relevant values are the ones for the overnight stays and the degree of occupation [3]-[9].

TABLE I
THE ANALYSIS OF THE NUMBER OF TOURIST WHO ARRIVED IN THE TOURIST ACCOMODATION UNITS

Year	Total	Romanians
2006	686502	624690
2007	796162	737971
2008	826747	791020

The source: The Annuals of tourist frequency recorded in Romania, 2006-2008, The National Institute of Statistics, Bucharest, 2010.

The tourists who have wanted to spend their free time in the resorts from the seaside represent only 11 - 15% of the tourists total from Romania, which means that a weak revaluation of the existing endowments, but also the insufficient tourist services, especially for those who have higher incomes, whose requirements have grown a lot during the last few years. The number of foreign tourists is very low, many coming to the seaside, especially, at the beginning and the end of the season, when the crowdedness is reduced. The year 2008 is characterised by higher values for the arrivals and the overnight stays of the tourists [10].

The number of overnight stays shows a reduced share compared to the total recorded in Romania. Although here approx. 40% of the accommodation capacity of the country is focused, we cannot observe the same thing for this indicator. Very many are accommodated by relatives, friends and the unofficial tourism is also practised. The duration of the stay has reduced with every year and this is more and more obvious for many Romanian tourists. The foreign ones, beyond their

presence, especially in Mamaia, Neptun, Jupiter, Eforie Nord resorts, have a longer stay because they visit other resorts as well, besides the ones they are accommodated and wish to know more tourist objectives in Constanta and Mangalia.

TABLE II
THE ANALYSIS OF THE NUMBER OF THE OVERNIGHT STAYS IN THE TOURIST ACCOMODATION UNITS

Year	Total	Romanians
2006	3745810	3300654
2007	4054625	3707860
2008	3990209	3790974

The source: The Annuals of tourist frequency recorded in Romania, 2006-2008, The National Institute of Statistics, Bucharest, 2010.

The degree of occupation or the index of the capacity usage constitutes an important indicator in the analysis of the efficient exploitation of the accommodation units, which connects between the request (the number of overnight stays) and the offer (the operating accommodation capacity). In table III, the comparative data of the indexes evolution for the net usage of the accommodation places from the units existing locally (the seaside) and nationally are presented for the period 2006-2008. The real period for practising the seaside tourism is from May 15th to September 15th, although the season is officially opened on May 1st, every year, and it ends on October 1st.

TABLE III
THE AVERAGE DEGREE OF OCCUPATION, FOR THE UNITS IN THE SEASIDE AREA AND THE TOTAL FOR THE COUNTRY

Year	The Seaside	Romania
2006	39.8%	33.6%
2007	45.7%	36.0%
2008	49.2%	36.4%

The source: The Annuals of tourist frequency recorded in Romania, 2006-2008, The National Institute of Statistics, Bucharest, 2010.

This indicator, compared to the period of a year, has an average value, but taking into account the period of the summer season of approx. 4 months, this degree of occupation reaches values of 65-85%; this phenomenon is observed especially for the months of July and August, when the request is maximum [11]. In comparison with the data recorded nationally, the ones for the seaside have higher values, an extra proof that among the existing tourism forms, this is the most demanded by Romanian tourists [12].

III. THE EXISTING TOURISM FORM

The entire tourist potential has allowed the development of tourist activities focused on certain types of tourism [13]. In time, the following tourism forms have appeared:

- The tourism for rest and recreation is one of the oldest forms of tourism practised, which has evolved together with the diversification of the tourist services, especially of those from entertainment. The tourists are interested in the sun and the beach, the sports with the ball, nautical sports - hydro-bicycles,

scooters, aquatic sports, yachting, towing in different inflatable means etc., light cycling, diving. This is practised in all the seaside resorts, the most requested ones being the accommodation units with a comfort of 2 and 3 stars.

- The spa tourism for physical recovery, corporal and facial cosmetics, is the tourism form that has known the most rapid modernisation; before 1990 medical types of systems were used, but nowadays very modern techniques and endowments are used for the physical, aesthetic and psychological recovery; these units exist in some hotels in Mangalia, Neptun, Mamaia and they are classified among the 4 and 5 star hotels. In Eforie Nord, Mangalia and Techirghiol resorts there are sanatoriums with a medical profile, focused on the application of alternative treatments in the profilaxy and the treatment of some joints and muscular and neurological diseases.
- The social tourism for children and young people is offered in Costinesti resort, a place preferred by students and young people without families and children, as a fun place, and Navodari resort, focused on the most important camp for pupils. Moreover, the tourist offer from these resorts has started addressing to other tourist segments, but they are very few. Here the most dominant are the accommodation units of 2 and 3 stars, especially the hotels for young people - 3, the tourist villas - 37, the bungalows - 90, the tourist hostels - 21, clubs and discos.
- The active tourism for leisure activities and sports is focused on the practice of light sports, from the need to move and for an active rest. This type of tourism has started developing in the last 15 years; the tourists preferring riding the bicycle, paragliding, yachting, sailing competitions like Cataramna and Caravelle, aquatic scooters, tennis, table tennis, badminton, horse riding (the stud farm from Mangalia), casino games etc. This type of tourism is very popular among the employed young people, with above average incomes who prefer the hotels of 3 and 4 stars.
- The business tourism and the congresses have known an ascending evolution in the last 20 years. Constanta and Mangalia cities have become important hosts for numerous economic reunions, economic contracts conclusions, seminars and conferences on social, medical and scientific themes. At the level of the tourist resorts, only Neptun resort has the best conditions for such type of events. This tourism has the merit of supporting accommodation, catering and leisure activities at the beginning and the end of the season, when the tourist demand is decreasing and the revenues are lower.

IV. THE STAGES OF EVOLUTION OF THE SEASIDE TOURISM FROM ROMANIA

The Romanian tourism has evolved in three major stages [14]- [15], as follows:

- The 1990-1948 stage is the beginning period, when the influences from the foreign countries, especially Italy and Greece, start to apply. In the first three decades of the 20th century, many individual buildings, villas or rest houses, were built in Constanta and Mangalia. The first hotels and villas appeared in Eforie Nord and Sud, Techirghiol, Rex-Mamaia. The oldest resort can be considered to be Eforie Sud or Carmen Sylva, with the first spa with cold baths, "Hagi Pandele", on the shore of lake Techirghiol, which dates from 1891, through the contribution of Ioan Movila, and the hotel Movila in 1892. From 1892 Eforie Sud separated from Techirghiol locality and became a separate tourist resort. Mamaia resort has its beginnings in 1906 and would develop more between 1919-1929. The activity on the entire seaside started more obvious between the two world wars (the railway between Constanta and Eforie Sud in 1927, the water supply at Constanta and Eforie Sud) and it was stopped by the nationalisation in 1948, at the same time with the socialist regime.
- The 1956-1966 stage is characterised by the process of nationalising the old tourist units from the old resorts, including from Constanta and Mangalia towns, by demolishing some, although they could have been considered historic monuments, and the allotment of the seaside area for new buildings. Thus the large capacity hotels were built - Parc and Perla with a total of 10000 places in Mamaia, Splendid with 1500 places in Eforie Sud etc. The children resort Navodari was built (1960) and Costinesti for the young people (1959). This stage is the one that would determine and extend Mamaia tourist resort towards the north and the south; the railway and the roads were modernised in order to ease the access to the resorts from the seaside.
- The 1967-1977 stage set the bases for a larger number of resorts - Neptun, Aurora, Olimp, Saturn, Venus, all located at the north of Mangalia. New hotels were built in Mamaia, Eforie Nord, Eforie Sud and Mangalia. The development of the economic relationships with the socialist countries from MEAC, from where many tourists came, determined the building of very large hotels, on many levels and having hundreds and thousands of accommodation units. Together with these, the catering units and the leisure facilities were diversified, according to the requirements of the period; the tourist activity until 1989 unfolding through the County Agency for Tourism Constanta.

- The 1978-1989 stage is characterised by the reduction of the large capacity investments and the development of spa clinics, leisure facilities, the modernisation of some older accommodation spaces from Eforie Nord, Eforie Sud, Techirghiol, smaller hotels were built in the north part of Mamaia - Alcor, Vega, Amiral, Comandor, Lido etc. During this period, the meal vouchers were introduced with which the tourists could have the meal at any restaurant from the resort and not only the one in the hotel where they were accommodated. The conditions for the first holiday villages were created and for a beach field and accommodation space affiliated to the Club Mediteranee. The number of open air sport courts increased and new pools were built.
- The stage starting in 1990 up to the present brought the largest and rapid changes in the seaside tourism. The old hotels and the other accommodation units were sold and transferred to the private sector. These were the starting point of the many tourism companies. In the last 15 years, many hotels have been built, others have been modernised. The catering units have diversified very much, there existing approx. 850 units (restaurants, fast-foods) with 150000-160000 seats, without taking into account the small local catering units; the endowments and the leisure facilities have diversified, the Aqua Park - Mamaia, aquatic complexes - Saturn, holiday clubs - Mamaia, Jupiter, Venus, the private aerodrome for air sports in Tuzla, other facilities for practising light and nautical sports.

V. THE CURRENT PROBLEMS OF THE SEASIDE TOURISM

The resorts from the Romanian seaside face more problems, among which the most obvious is the reduction of the number of tourists, in the last decade, the tourist offer managing to rise only partially at the level of tourist expectancy [15]-[19]. The Romanian seaside shall compete with other new offers of seaside, existing in the entire Black Sea basin.

This fact is even more important as we notice that in this area there are strong competitors, like Bulgaria, Croatia, Ukraine, Montenegro, and Albania in the near future. Despite the tourist promotion in the European and national tourism fairs, the number of tourists has not increased very much.

The competition in the European space of the Adriatic Sea, the Black Sea and the Eastern Mediterranean Sea is very strong. In this context, the seaside from Ukraine, Montenegro, Bulgaria, Croatia, Turkey and even Albania are more and more emphasised. Between 2000-2007, Bulgaria received four times more tourists than Romania (Eurostat, 2009), having an annual average increase between 10-11%. Also, Ukraine, Turkey had increasing rates of the seaside tourism of 2-3 times higher than the ones in Romania.

For the period 2010-2011, the experts generally predict a stagnation of the tourist flow at the level of 2009. Thus in 2009, the tourist flow was lower than 2008 with 10-15%, according to the attractiveness of the tourist resort as well. In order to keep an acceptable level of the tourist flow, the application of the early-booking system has started. The last Tourism Fairs of Romania, from 2010, March 5th-7th "Holiday Market", 3rd edition, and March 25th-28th, 23rd edition, both in Bucharest, promoted intensively this type of program among Romanian tourists. By Romania's participation in the International Tourism Fair from Berlin, this year, offers were made for the resorts from the seaside, especially Mamaia and Neptun.

Another negative, but continuous, aspect is the marine erosion. This phenomenon has always existed, but during the last five decades it has accentuated very much. We can mention a few aspects occurred because of the human interventions, with a negative effect on the beach areas:

- Pushing further into the sea the deposits carried by the Sulina Canal, in order to maintain the navigational depth;
- The large number of hydrotechnical buildings on the Danube, located on the middle and inferior course, which have reduced the deposits with approx. 50%.
- The extension and the modernisation of the harbour areas, from Midia and Constanta, Mangalia, which have diverted the seaside currents towards the open sea;
- The presence of some industrial activities from the harbour areas with accidental pollution impact on the natural environment;
- The tendency of the marine level to increase with 1.5 - 3 mm per year, as a consequence of the high volume of fresh water brought by the direct affluent rivers;
- The increase of the number of storms and their intensity, especially during the cold season, with devastating consequences on the beaches and the natural coasts;
- The illegal extraction of sand by the population from the nearby localities for constructions, fact that affects the thickness and the quality of the sand layer;
- The deterioration of the concrete dams that have the role of directing the deposits towards the shore.

Another problem is the manner in which the Romanian resorts have appeared and developed along the Black Sea coast. The majority has old accommodation and catering units that partially satisfy the current requirements of the tourists. The deficient aspect is that of the exterior architecture that is not adapted to the natural environment and to the regional specific, the small number of leisure spaces and the insufficient local transportation. During the last two decades, the modernisation action of the numerous hotels and villas have intensified, and other have been built. We also notice the construction of very modern health centres, like SPA-Ana

Aslan health Spa from Eforie Nord, Cocor Spa Centre, located between Neptun and Olimp.

In order to support the seaside tourism, the Seaside Association was constituted in 2006, which started the program "Seaside for everyone" (3000 places offered to the tourists) offering tourist packages at the beginning and at the end of the season at attractive prices. From 2009, this has become the Seaside-Danube Delta Association in order to develop common tourist packages. Meanwhile, its purposes have focused on the promotion and the tourist development, including all the city halls from the resorts and the localities on the coast line and in the delta of the river Danube. Moreover, from 2005, in September of every year, the Seaside exchange takes place and sets the evolution of the tourist products and the prices for the main tourist services.

Among the tourism forms from Romania, the seaside tourism holds the highest share, because there is the tradition of spending at least a weekend at the seaside, or a part of the holiday. 40% - 120000 places are located on the seaside from the accommodation capacity of Romania, the majority being the 2 star and 1 star units. The tourist season is short, around 3 months a year, with reduced possibilities of extension as a consequence of the small number of recreational and entertainment activities. The tendency to extend the season in the months of May and September started in 2007, by organising new activities and by involving the economic agents.

From the foreign tour-operators we notice only the presence of those from Dertour and TUI, but they do not have a constant feature, thus there have been years when they gave up sending tourists to Romania (flood problems, the bird flu etc.). Moreover, the duration of the stay has been reduced from 7 days to 5 days on the Romanian seaside for the internal as well as external tourism. For the internal tourism, the weekend tourism has appeared in the last 2-3 years in almost all the seaside resorts, fact that agglomerates the Bucharest - Constanta highway, but also the road traffic flow between the resorts, as well as the accommodation and catering units or the beaches. Such a developed phenomenon brings a certain discomfort for the tourists on holidays and leaves.

VI. CONCLUSION (DEVELOPMENT OPPORTUNITIES)

The current economic conditions have reduced the level of investments in new development and modernisation projects. In the European context, together with Hungary and the Check Republic, Romania has had a serious decrease in the tourist industry as a whole. This aspect is obvious especially at the level of the cities with tourist function and of the national resorts. The years 2007 and 2008 had the best evolution of the tourist indicators. For 2009, the decrease compared to 2007 was of approx. 30% at the level of the cashed revenues.

However, according to an OECD study, from 2010, Romania holds and attractive investment environment compared to other countries from the Central and Eastern

Europe, with a lot of facilities. The negative aspect is given by the change in the economic and fiscal legislation without the prior consultation of the private entrepreneurs [20].

The seaside tourism has confronted with a lower decrease, of 15%, due to the fact that the seaside constitutes the favourite internal destination (data according to the Trend Hospitality consultancy company - Bucharest, 2010). At the seaside, many large accommodation unit owners would like to sell because of the high operational costs. The most profitable are the accommodation units, the catering units with a small and medium capacity, with lower operational costs.

The application of the MO 485/15.05.2009, since 2009, on the certification of the tourist beaches has the role of reducing the illegal buildings, the exploitation of the beaches based on contracts and tourist certification. Moreover, there is a set of criteria for the use of the beaches for tourist activities which focuses on the light buildings, which can be demounted, and on the extension of the sport spaces, of the leisure facilities for children.

The opportunities for the preservation of the tourist flows at the level of the years 2007-2008 shall be very difficult for the following period; thus, an important place shall be filled by the public-private partnerships, projects with European funds in order to maintain the optimal activity of the seaside area, the governmental funds for the general and tourist infrastructure. Each resort has had an ambitious investment plan, but they shall select for completion only those projects that lead to the preservation of the tourist activity.

Law no. 63/2010 (MO215/06.04.2010) brings amendments to manner of administration of the beach surfaces, in order to be used by the economic agents based on contracts, during the season, with the possibility of extension the next year, being accepted only those who unfold tourist activities. Through GD 120/24.02.2010 the national interest investments that are necessary for the support of the tourist activities on the seaside have been set forth. For Constanta-Tomis, Tuzla, tourist harbours for leisure are stipulated. In Mamaia, a passengers' bridge and 4 boat bridges for the leisure vessels to land are also stipulated; also, the start of some technical studies for the urban and the existing tourist infrastructure modernisation are stipulated for Eforie Nord and Sud, Techirghiol, Costinesti, Mangalia resorts.

The investments are focused on the rebuilding and the consolidation of the coast from Eforie Nord, and the connection between Eforie Nord - Techirghiol - Tuzla, on lake Techirghiol, the building of a spa park in Techirghiol, of a passengers' bridge over DN 79 national road, the modernisation of the sulphurous water of 38 degrees Celsius, of a parking space in Costinesti, the modernisation of the tourist harbour, a gondola for the seaside line, Aqua Park on 15 ha, of a fun fair in Mamaia, the modernisation of a fishing harbour, of the access towards the beach, the rehabilitation and the consolidation of Limanu coast.

All these projects contribute to the best revaluation of the tourist resources. Their achievement in the next 2-4 years shall

contribute to the local economic growth, and the constitution of new work places. Moreover, the new opportunities shall determine an increase in the number of Romanian and foreign tourists. The quality of the services offered shall depend on the tourist infrastructure quality as well and it shall influence the preservation of constant tourist flows.

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