Abstract

Nowadays, Romanian tourism, just like the global tourism, is characterized by a strong competition among tourist destinations. Therefore, travel destinations (resorts or countries) need more and more a new model of tourism policy able to influence their competitiveness position under the current competitiveness conditions. Tourism represents a key domain in which our country could excel. Romania is one of the most diversified countries when it comes to the tourist products that it offers (natural and anthropic resources, unique flora and fauna European biodiversity).

Keywords: competitiveness, advantages, tourism, tourist destination

JEL Classification: L83, O10

1. Introduction

Although from an economic point of view the notion of tourism competitiveness defined as being “the capacity of dealing with a competition in an efficient and rentable manner inside the tourist market” can be integrated in the notion used by the field literature, tourism’s specific content determines a complex and multidimensional approach of this concept. This is necessary if taking into account a series of peculiar features of the tourist product.

First of all, we must highlight the fact that the multitude of components that are used in conceiving and trading a tourist product transformed the development of its competitiveness into a complex process realized with the help of: both the tourist resort’s competitiveness and that realized at the level of each type of tourist enterprise: direct tourist service provider: transportation, accommodation, alimentation, recreation, treatment or intermediary: tour operator, travel agency etc.

Moreover, from the tourist’s point of view, the product covers the entire experience from leaving home till returning back home, the existence of a deficiency at the level of a single component being enough for affecting the global level of competitiveness.

At the same time, we must underline the fact that most of the times a tourist destination overlaps or can be encountered near a local community: city or rural settlement

* Associate Professor, Faculty of Touristic and Commercial Management, Bucharest, "Dimitrie Cantemir" Christian University, baltaretuandreea@yahoo.com
with economic, social and cultural life influencing more or less the tourist activity, the former being influenced in its turn by the latter.

2. Factors that determine the competitiveness in tourism

The starting point in establishing the strategy for ameliorating the competitiveness position is represented by the competitiveness’ determining elements which are mainly provided by:

a) **Factorial conditions**, respectively:
   - Natural and cultural resources;
   - Capital and infrastructure resources;
   - Human resources.

The combination of the three factor groups forms the basis for establishing a destination’s competitiveness position.

b) **Bidders’ quality and structure**;

c) **Market structure and organizational structure**;

d) **Conditions of request’s manifestation and offer’s adaptation**;

Therefore, the first **Travel and Tourism Competitiveness Report** established by the World Economic Forum was published in 2007, the data covering 124 countries. In 2011, the same report covers 139 countries, including Romania. It measures the factors which determine the attractiveness of a country’s tourism. The grades given for each factors varies between 1 (low performance) and 7 (high performance). The analyzed categories were: the legislative frame, the business environment and infrastructure and natural, cultural and human resources. In their turn, these 3 categories include 14 subcategories.

Hence, the **regulatory framework** includes:
- Polity rules and regulations;
- Environmental sustainability;
- Safety and security;
- Health and hygiene;
- Prioritization of Travel@Tourism.

The **business environment and infrastructure** refer to:
- air transport infrastructure;
- ground transport infrastructure;
- tourism infrastructure;
- information and communication, technological infrastructure;
- price competitiveness in the Travel@Tourism industry.

**Natural, cultural and human resources** cover the following sectors:
- human resources;
- affinity for Travel@Tourism;
- natural resources;
- cultural resources.
After analyzing these aspects, Switzerland was the country to occupy the first place, obtaining a 5.68 score, followed by Germany with a 5.50 score and France with 5.41. Of all the 139 analyzed countries, Romania occupies the 63rd place with a total score of 4.17.

In 2013, the same report covers 140 countries, including Romania. After analyzing all aspects, Switzerland was the country to occupy the first place, obtaining a 5.66 score, followed by Germany with a 5.39 score and Austria with 5.39. Of all the 140 analyzed countries, Romania occupies the 68th place with a total score of 4.04 in what regards the three categories, meaning the regulatory framework inside which it occupies the 66th place with a 4.61 score, the business environment and infrastructure, Romania occupies the 68th place with a score of 3.67, and in what regards the natural, cultural and human resources, our country occupies the 73rd place with a low score of only 3.85.

Tabel no. 1 Romania’s situation when the subcathegories were analyzed in 2012

<table>
<thead>
<tr>
<th>Policy rules and regulations</th>
<th>Environmental sustainability</th>
<th>Safety and security</th>
<th>Health and hygiene</th>
<th>Prioritization of Travel@Tourism</th>
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<td>87</td>
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<td>4,67</td>
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<td>Air transport infrastructure</td>
<td>Ground transport infrastructure</td>
<td>Tourism infrastructure</td>
<td>Information and communication, technological infrastructure</td>
<td>Price competitiveness in the Travel@Tourism industry</td>
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<td>93</td>
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<td>109</td>
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<td>Human resources</td>
<td>Affinity for Travel@Tourism</td>
<td>Natural resources</td>
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<td>83</td>
<td>4,73</td>
<td>122</td>
<td>4,11</td>
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Source: The Travel & Tourism Competitiveness Report 2013, World Economic Forum

Of all the 14 analyzed elements, Romania occupied the best position, 34th, when it came to tourism infrastructure and the lowest position, 122, when it came to affinity for Travel@Tourism. The highest score, 5.36, belonged to health and hygiene and the lowest, 2.59, appeared in the case of air transport infrastructure.

As a result of launching Romania’s tourism brand (Romania – Explore the Carpathian Garden) in 2010 in Shanghai, market researchers highlighted Romania’s top six most competitive tourist products:

- cultural circuits;
- nature-based tourism;
- rural tourism;
- city break packages;
active and adventure tourism;

- balneary and wellness tourism.

In the same context, it had been established the fact that our country’s main competitive advantages are nature and virgin landscapes (the Carpathians, the Danube Delta), the uniqueness of the cultural patrimony (the UNESCO sites) as well as the culture and lifestyle’s authenticity.

Moreover, Bucharest occupies the 21st place in the top 100 most dynamic cities when it comes to international tourist arrivals. The increase of human resources and tourist services’ quality represents the first priority for the Romanian tourism’s competitiveness, increasing the exports of Romanian tourist services.

3. Romania's competitive advantages in tourism

Romania presents numerous major competitive tourist advantages in comparison with the other EU member states or adhering countries, such as:

- variety and richness of biodiversity and of biogeographical regions of Romania;
- rich and varied tourist resources such as the Black Sea, the Danube Delta, the Danube and the Carpathian Mountains;
- coastline and beaches of the Black Sea;
- favorable geographic and geopolitical position. As a result of its geographical position, Romania enjoys the existence of a unique biodiversity, both in ecosystems and species as well as on a genetic level;
- the existence of numerous protected natural areas;
- preserving a natural environment unaltered by human presence and activities;
- preserving in an unaltered natural environment some flora and fauna specimens which do no longer exist in other countries or can be visited only in captivity;
- the Danube Delta biodiversity (Biosphere Reserve, located in the UNESCO World Heritage and Wetland of International Importance, RAMSAR); its swamps are a unique natural heritage with a rich biodiversity and many species of birds (over 3,000 pairs of pelicans - representing over 80% of European livestock)
- three biosphere reserves: - Delta (1991), Retezat (1979), Pietrosul Rodna (1979);
- the diversity of national parks and protected areas - about 10% of the country - with unpolluted forests, lakes and rivers;
- the existence of wilderness areas unaffected by human intervention;
- relatively low degree of pollution;
- the existence within protected areas of virgin and quasivirgin forests;
- the presence of a large number of endemism;
- existence of the sites Natura 2000;
- the existence of the highest European density of large carnivores;
the presence in the Danube Delta of 60% of the global population of Pygmy Cormorants;
- well preserved and valuable customs, traditions and local architecture, Romania being a Latinity island in a Slavic ocean;
- highly valuable and attractive cultural-historical and ethno-folkloric patrimony;
- the natural environment’s beauty and nationally and internationally valuable historical monuments create the premises for obtaining a significant economic input from the domain of rural tourism. This represents a significant request on the tourism market and it implies low risk small investments, representing a resource for rural workforce. At the same time, local tourism also has a strong eco-touristic component and offers a way of an European integration of the Romanian rural society;
- 4 Pomme d’Or or Golden Apple prizes awarded by IFTJR (the International Federation of Tourism Journalists and Writers) of the 41 awarded since 1971 places Romania on the first place together with Belgium and Spain, among the most awarded destinations (1975-Moldoviţa Monastery and other monasteries in Bucovina painted with exterior frescoes; 2009, Sibiu Borders - ecotourism area; Danube Delta - Biosphere Reserve; Company Blue Air);
- 3 Degrees for European Destination of Excellence (Depression Horezu-2008; Apuseni Natural Park-2009-2010 Geoagi-Geoi-Bai - 2010);
- 3 European Diploma of Protected Areas (Danube Delta Biosphere Reserve - 2000 National Park Piatra Craiului-2007; National Park Retezat-2009);
- wide range of cleaning procedures in health tourism;
- large number of caves (about 12,500 inventoried) - 5th place in Europe and No. 9 in the world;
- rich fauna and flora with unique species in Europe;
- 35% of the mineral water springs from Europe and pits, which offers a large range of spa treatments;
- temperate continental climate;
- 1/3 of the mineral waters European resources and an entire series of unique mineral resources or not so widely spread in Europe: choke damp gases in the Oriental Carpathians’ area, vegetable slime from Lacu-Sarat or lake Techirghiol, exquisite mountain landscapes, the Mud Volcanoes etc.;
- a high natural potential for developing ski tourism;
- good natural conditions for tourism activities - skiing, hiking, horse riding, cycling, water sports, eco-tourism, extreme sports etc.;
- diversity of the heritage - churches, archaeological sites, fortified settlements, etc., including 7 goals / areas which are UNESCO World Heritage (Danube Delta-1991, Church of Moldova-1993; Hurezi Monastery- 1993; Villages with Fortified Churches in Transylvania-1993; Dacian fortresses from Orăştiei Mountains-1999; historic center of Sighișoara-1999; wooden Churches of Maramures, 1999). Romania owns the 7th part from the World Heritage Sites;
- 3 traditions on the List of Intangible Cultural Heritage of Humanity UNESCO (Callus Ritual-2005, Doina-2009 and Horezu Pottery-2013);
➤ medieval fortress;
➤ rural settlements where one can experience the traditional lifestyle;
➤ museums - on various topics;
➤ musical and artistic world class shows - both classic and modern;
➤ a wide range of traditions and folklore festivals;
➤ legends – Dracula, Găina Mountain etc.;
➤ Sibiu – European Capital of Culture in 2007;
➤ resources for developing new tourist products;
➤ the entrance on the tourism market of some world operators such as Marriott, Hilton, Holiday Inn and Best Western produced a significant impact in what regards the increase of services provided to tourists, reflected in the evolution of accommodation in superior categories hotels;
➤ good network of airports;
➤ well represented rail network - the fourth largest in Europe;
➤ extensive road network, with many crossing points at borders;
➤ air transport company with a large network of destinations and the presence of many other carriers;
➤ high quality coaches for interurban transportation and other transportation means by tour operators;
➤ a well developed system for river transportation;
➤ well developed telecommunications networks - telephone, radio, GSM, satellite;
➤ electricity supply for 95% of the country;
➤ positive reputation in the anti-aging treatment, even if the medical research is in crisis and the spa sector is no longer motivating the young doctors;
➤ existence of an old service experience in mofettes and mines exploitation;
➤ dynamic sector for tourism operators;
➤ the existence of the National Institute of Research - Development in Tourism (INCDT);
➤ comprehensive program to promote tourism abroad - advertising, fairs, media and visits of the tour operators;
➤ the annual existence of tourism marketing and promotion program approved by Government Decision;
➤ the annual existence of a development programme for destinations, shapes and tourism products approved by Government Decision;
➤ the existence of the legal framework that allows development of protected areas and their conservation;
➤ the existing tourism brands - Dracula and Transylvania;
➤ the existence of the National Tourism Development Master Plan 2007-2026;
➤ the existence of the Danube Delta Master Plan;
➤ the existence of the Spa Tourism Development Master Plan;
➤ the existence of the National Strategy for the Development of Ecotourism in Romania. Launching Romania’s Ecotourism Strategy which has as main goal the transformation of our country into a European and global ecotourism destination,
ecotourism being perceived nowadays as a “trendy” tourism form. It can be noticed an increase of the accommodation options in the Danube Delta and Tulcea city, the most concentrated ecotourism development area in Romania.

4. The Romania’s tourism disadvantages in the international competition

Despite all these facts, we must also consider Romania’s tourism disadvantages as compared to other countries, European or not:

- the low contribution of the tourism sector to the Gross Domestic Product, respectively
  - 1.5% in 2012 as compared to countries in the same region, like Bulgaria-3.8%, Hungary-4.2% and Ukraine-2.2% etc.;
  - A small number of employees in the tourism industry in Romania in 2012, respective 2.3% of the total compared with Bulgaria-3, 5% and Hungary 5, 8%;
  - low investments in the tourism industry in 2012, respective 7.4% of the total investments;
  - a negative tourism balance (-297 million Euro; tourism profits of 1128 million Euro and tourism expenses of 1424 million Euro in 2012). For example, Bulgaria cashed 3,7 billion Euro in 2012, Hungary 4,84 billion Euro in 2012 etc.;
  - the average of the Romanian tourists’ expenses abroad is of 128 Euro (anul 2012);
  - the average of the foreign tourists’ expenses in Romania is of 142 Euro (anul 2012);
  - adverse general infrastructure, especially in what regards the transportation and communication system, as well as tourism services. It is not suitable for a large number of tourists;
  - large capacity hotels with old and inadequate structures, possessing a constant decrease of the operational capacity; the occupancy rate was of only 25.9% in 2012;
  - a very low average length of stay as compared to the existing tourist potential, respectively 2.49 days in 2012;
  - not yet valorized potential of the sector dealing with developing small and medium family businesses in tourism;
  - mountain tourism is adverse when it comes to the infrastructure of cable transportation systems for persons, these being old and, even if they assure safety for the tourist, they do no longer correspond to the tourist flux’s requirements in what regards elements such as velocity and capacity;
  - the poor functioning state of many treatment facilities;
  - small number of accommodation places as compared to other countries in the same region, respectively 301109 places in 2012;
  - problems related to the access infrastructure to archeological sites and architectural monuments, which is old and insufficient; the lack of parking lots with info points that would also promote the cultural objective; the lack of pinnacle points for fortifications, medieval fortresses, churches, historical monuments and monasteries; the lack of special camping places for pilgrimage tourism;
the instability of the governmental institutional frame which has attributions in
developing the tourism policy and strategy;

- the low and relatively constant number of foreign tourists visiting Romania,
  respectively 7936694 tourists in 2012 as compared to Hungary, for example, which
  received 10353000 tourists in 2012;

- the large number of Romanian tourists going abroad in 2012, respectively
  11148905, an abnormal evolution for a country possessing such a rich and diversified
  tourism potential;

- in 2012, the number of accommodated tourists, 7686489, also presents a big
  anomaly because by summing up the internal tourist circulation consisting of 15962114
  travels and the number of arrived tourists, that is 7936694, we reach the following number:
  23898963. Of all these, only 7686489 tourists choose to accommodate in homologated
  structures, the rest of 16212474 are not registered, this type of tourism being highly
  practiced in Romania;

- if we draw a comparison between the number of the tourist arriving and those
  leaving Romania, we can conclude that our country imports tourist services, being a
  country where tourists rather leave than arrive, a highly unusual situation for a tourism
  destination that possesses almost all categories of tourism resources. This phenomenon
  can be explained by means of the low quality of services, the recreation resorts’ lack
  of development, the personnel's poor training, the lack of tourism infrastructure, the quality-
  inadequate price relation etc.;

- the tourist density in relation to population and surface register low values (anul
  2012): 0.42 tourists/inhabitant, respectively 33.42 tourists/km². It is a favorable situation
  because there is no pressure in what regards the resources and there are no environmental
  or social conflicts, which makes them more attractive as compared to other countries. On
  the other hand, the small number of tourists is reflected in the low incomes gained out of
  tourism, as showed above;

- the lack of cooperation between tourist operators;

- inadequate facilities when it comes to many tourist destinations; disobeying the
  current legislation regarding environmental protection, the protection of tourism
  resources, the constructions regime in various areas, disestablishing local architecture etc.;

- inexistence of an inventory of all natural and anthropic tourist resources;

- the lack of indicators and markings by means of which tourists could locate the
  main tourist sites;

- the existence of a small number of local info points (not even Bucharest – an
  European capital – do not possess one) or tourism offices in various countries;

- even if in 2010 Romania was given a new country brand (Romania – Explore the
  Carpathian Garden), our country occupies the 101st place from 113 countries in
  2011/2012, 9 positions lower than last year (according to Future Brand);

- the Romanian traditions’ lack of continuity, except for few regions such as
  Transylvania and Maramures;

- the lack of monographic studies, books, brochures, maps, up-to-date flyers
  translated in languages of international circulation and nationally or internationally
  distributed.
5. Conclusions

Romania’s geographical position in Central Europe is favorable for tourism transit and other forms of tourism due to the reduced distances from major emitter countries. Our country has a high degree of safety compared with other receivers. In addition, Romania is a multi-ethnic and multicultural space and can exploit cooperative relations that can extrapolate in tourism to countries like Russia, China, USA, etc. The trend of population aging in the world can create opportunities for spa tourism in Romania. Romania still retains the natural environment untouched by human presence, species of flora and fauna which have disappeared in other countries or can be visited only in captivity. The weak development in some areas of traditional forms of tourism was carried out as an important prerequisite for the development of ecotourism, which would require our country as an important destination for this form of tourism.

On the other hand, the lack of guide for many of the sights of Romania, including those which are on the List of World Heritage UNESCO can affect tourist satisfaction. In case of UNESCO monasteries of Moldova, the mural painting presents several forms of degradation as a result of the action of physical, chemical, biological and human factors. It is notices that the consumption of the tourism renewable resources are at a rate of interest higher than their capacity of recovery. Then we add the lack of cooperation between the tour operators. Two major phenomena with negative implications on the tourism economy are the underground economy and the black tourism against which it is needed immediate and radical action. The political instability, namely the ministers permanent change causes lack of continuity of programs, strategies and policies in the field and inappropriate use of EU funds.

Therefore, many of the competitive advantages presented above could be explored if Romania would be economically and politically stable and if tourism would be declared a national priority. We can also add the necessity of a Tourism Ministry in a country possessing such a highly defined tourism potential.

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