

Programs and Projects in the Tourism Industry. The Romanian Public Policies

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Abstract. Romania is one of the countries with the largest tourist potential in Central and East Europe due to the large man-made and natural objectives' variety. There are incredible canyons and waterfalls, colorful hills, plateaus and fields, clear lakes and rivers, fascinating swamps and caves, snow-capped, magnificent mountains, the amazing Danube Delta Biosphere Reserve, and even islands and volcanoes, let alone the rare and diverse fauna and flora. Although Romania has so much to offer, in 2017 there were only 5,3 million nights spent in the country by non-residents, out of 1497,8 million in EU resulting in a 41,6% of direct Travel & Tourism GDP. Tourism Development Master Plan for Romania 2007-2026 is to be of help in terms of GDP, income per capita, workplaces, investments, but also country brand - cultural heritage and natural resources. This Master Plan contains an overview of Romania in terms of accommodation capacity, seasonality, facilities, manpower, congruent industries, hospitality training, databases, marketing, but also telecommunications, waste disposal systems or environmental impact and a strategy to improve it in terms of transport development objectives, potential tourism development areas, tourism policies, travel insurance, tourism packages, standards, investments, expenditure and income. The Master Plan, if taken into consideration when applying for funding in the areas of Cohesion, Environment, Agriculture & Marine and Fisheries Policy, Research, Innovation and Competitiveness Education or Culture and Education, would help Romania be more competitive in the tourism sector and show off all its wonders. But how many entities that have received funding for their tourism-related projects have read, agreed with and aligned their ideas with it? This article tries to find out if the current Romanian public policies avert tourism from flourishing or if it is a matter of poor program and project management, which are the next steps to be taken and the best practices to implement them in a way that respects the definition of sustainable tourism.

Keywords: tourism; master plan; management; challenges; policies.

Introduction

Since 2007, the Master Plan for National Tourism of Romania 2007 - 2026 is the basis for most governmental actions and tourism entrepreneurs. Its main objectives are: "(1) Increasing foreign exchange earnings; (2) Bringing the Romanian economy and society to the existing level in the EU; (3) Increasing the quality of life; (4) Sustainable exploitation of Romanian cultural identity; (5) Sustainable use of natural and material resources in Romania; and (6) Ensuring access to the benefits of tourism across the entire country (WTO, 2007).

Directly related to the quality of life, sustainable use and exploitation objectives of the Master Plan, sustainable tourism, "a positive approach with the intention of reducing tensions and frictions created by the complexity of interactions between the tourism industry, tourists, the natural environment and local

communities as hosts of tourists" (Journal of Sustainable Tourism, 1993), is often considered the antonym of mass tourism.

From an economic perspective, however, this assumption is inconceivable, since mass tourism is the one that makes a significant contribution to GDP in any country. For this reason, most governments are trying to establish laws that protect the environment and heritage from mass tourism while promoting it to gain important benefits such as added value superior to other industries, increasing local employment, capitalizing on inexhaustible resources, balancing development in all areas of the country, increasing production growth, etc.

With the adherence of Romania into the European Union, funds became even more accessible to all Romanian enterprises that wanted to capitalize on them. The programs for the 2014-2020 programming period have many priority axes whereby companies that are active in tourism are eligible, like National Rural Development Program, like Administrative Capacity Development Program, and like many others.

This research aims to underline to which extent the Romanian Government can and will make everything in its power to bring Romania to its full touristic potential.

This article has several research questions and it has the intention to find out (1) whether current public policies in Romania are preventing tourism from flourishing or whether the problem is related to program management and precarious projects, (2) what are the next steps that should be taken and (3) which are the best practices to be taken in order to respect the definition of sustainable tourism.

State of the arts

According to *the Research Survey on the Development of Public Investment in the Tourism Infrastructure Specific for Romania for the period 2007-2016* and their *Main Directions for Development*, in the 27 years since the fall of the communist regime, the only two forms of investments made were replacement investments and development investments. As we can see from the same study, in 2016 tourism investment was only 8.1% of the total, but generated 197,500 jobs, or 2.4% of the total in Romania.

Actually, numerous studies reveal that the biggest blows that Romanian tourism has received, as well as the economy in the general sense, have been the shift from a command economy to a modern market economy and the economic recession in 2008. Among the two, the effect of which is yet to be felt is the first, although it has been three decades since its beginning.

A study made by German tour operators shows that Romania has several big issues that discourage especially foreign tourists, such as inefficient promotion that prevents tourists to organize excursions in Romania, poor infrastructure that puts a stop to car trips (that have the highest rate), lack of luxurious hotels in the rural areas (that have the most beautiful sceneries and so on).

When it comes to Romanian tourists the numbers show that as the disposable income grew, they had an increasing desire to visit more and more exotic destinations. To maintain the interest in traveling in-between borders, the government created 1450 lei holiday vouchers to be spent in Romania by the governmental employees, which round up to 1.5 million people. In 2017, more than half of the 4.1% that meant Travel & Tourism GDP in Romania came from Romanian tourists visiting their home country either for business, or for leisure, so this initiative can be considered successful.

The concept of "*New Tourism*", which comes from the global awareness of the need for sustainable tourism and new technologies, involves changes in the optics of the relationship between the State and the tourism companies. In the new vision, the State gains a more prominent role and is actively involved in the way in which companies carry out their activities; the latter must demonstrate that the investments made support local tourism in a sustainable manner, must be transparent, must communicate and seek the necessary support to implement ideas that help to adapt to market realities.

Methodology

The research methodology, in order to truly understand the effects of the current state of tourism in Romania, had to include a short analysis over the previous legislative framework and a case study on the Bihor County, the first one to implement a Destination Management Structure. (<https://peharta.ro/bihor/>).

The case study was chosen as a qualitative research method because of the emphasis on the discovery and acquisition of phenomena that have taken place, difficult to quantify, and with descriptive purposes. Since this research does not aim to test hypotheses, but only to learn and understand the factors that have favored this success, it does not want to generalize the results.

The sample chosen by the researchers was rational, "*depending on the estimated relevance in relation to the research theme*" (Popa, 2016). The volume of the sample reduced to the extreme is also justified due to the orientation on the individuality and peculiarities of this county, the only one who set up a Destination Management Association before the law was enacted, in order to encourage tourism in Romania.

The case study focuses on the context in which Bihor County has managed to implement the strategies discussed over time, even at the Ministry of Tourism, but have taken the form of a very recent law.

Qualitative tools such as observation, interview, analysis and interpretation of documents and materials have been used throughout the analysis to ensure its soundness.

The evolution of the Romanian tourism

Since the 1700s, Romania has been a holiday destination especially appreciated by international tourists who preferred our country for balneal treatments and then for spa resorts developed in the 19th century. At the same time, the first organized forms of tourism management in Romania (associations, clubs, societies, etc.), were created with the aim of stimulating tourism in all social levels, even international, focusing on mountain attractions, building huts, arranging roads, organizing ski courses, publishing almanacs, tourist guides and others alike.

Another important step in the development of Romanian tourism was the establishment of the Romanian Geography Society in Bucharest, which mainly dealt with the publication of valuable documents such as *the Great Geographical Dictionary of Romania* (1898-1902).

In the following years, numerous tourist associations appeared, starting with *the Tourists Circle* of Bucharest in 1891 and continuing with *the Carpathian Society of Banat* in 1892, *the Tourists Society in Romania* in 1903, *the Turing Club Romania* in 1926, and many others, with valuable contributions to the development of accommodation units and infrastructure necessary for tourism.

The next important turning point of tourism in Romania took place in the post-war period; when 2 events dictated its trajectory. The first of them was the dissolution of all the tourism associations in 1948, their patrimony being transferred to the National Tourist Office.

The second decisive event was the establishment of the Ministry of Tourism and Sports, in 1971, a ministry with leadership and organization roles, to which the county tourism offices were subordinated. (Rădulescu & Stănculescu, 2012)

In the following period, there was a series of legislative measures regulating the establishments, organizations and operations of Romanian tourism units, which considered tourism as a "*priority area of the national economy*"(OG 58, 1998). In this sense, the last measure proposed before the end of the communist regime was the Special Tourism Promotion Fund, which, as the name itself says, aimed to finance tourism promotion and development projects.

In the period between 1960 and 1989, the economic and financial interests of the authorities were the basis of all the efforts made to *"regulate, expand, modernize and specialize the Romanian tourist network"* (Rădulescu & Stănculescu, 2012).

After the fall of the communist regime, the slow, flawed and unprepared privatization of the tourism sector had drastic consequences. The management formula assumed that the administrators were not owners, which made them ignore the investment needs of the properties and focus on the profit obtained with a minimum effort. The disastrous effects of inefficient privatization were mainly related to the dramatic decline in demand, which naturally resulted in the deterioration of Romanian resorts in all respects.

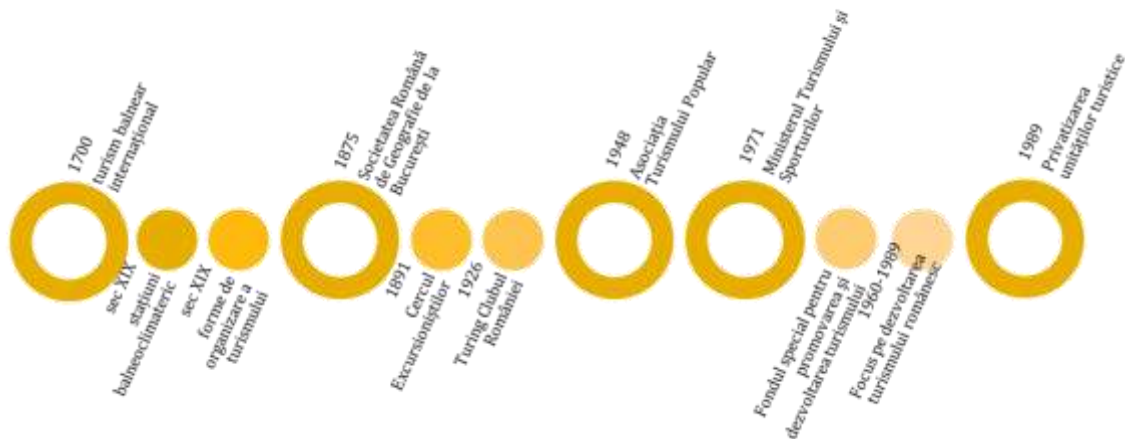


Figure 1. The main moments from Romanian tourism's history between the years 1700 and 1989

Source: Authors' representation

After a shallow analysis of the period 1700-1989, we can conclude that our forerunners had a clearer view of the economic impact of tourism in the national economy. The sphere of spa tourism contributed immensely to the development of building cabins, balneo-climatic centers, setting up magazines and clubs, promoting tourism in the country and outside it, but also through many others. With the passing of most of these associations into state administration, the enthusiasm of entrepreneurs declined slightly but returned as they noticed the involvement and the help they got in the latest years.

Strategies and public policies to stimulate tourism in Romania

The first initiative to solve the situation caused by the inefficient privatization processes after the fall of communism took place in 2001 and aimed to accelerate and complete the privatization process, passing the tourism trade companies under the responsibility of the Ministry of Tourism. Even with the help of this measure, the pace of tourism unit's privatization much slower than that of agritourist pensions, which achieved surprising and superior economic performances than the former. After the inefficient privatization, the next harsh blow received by Romanian tourism was the package of austerity policies implemented by the Government, coupled with the 2008 international financial crisis.

Today, in order to overcome the damage, the purpose of tourist destinations should shift from simply promoting the most valuable tourist points to developing sustainable tourism strategies, since the only thing more difficult than promoting a less-known destination is controlling the complex impact it may have.

Adjacent to the objective of the new tourism policy to support sustainable tourism in Romania is the objective to develop new attractive touristic products 365 days a year to overcome the seasonality and territorial diversification of tourist flows and to stabilize the employment situation in this sector which is currently characterized by a high degree of fluctuation. This, together with the disappearance of professional schools, results in an acute crisis of qualified staff, which is reflected in the low average of wages in the tourism sector.

The solution found by Romanian employers for this issue is the import of the necessary labor, especially from the Asian countries; a solution that raises various issues related to the imposition of an average salary on the economy, language barriers and much more.

Not only for these reasons, Romanian tourism needs to focus on planning, creating and managing new tourism products and improving traditional services, shifting the focus on customer satisfaction. In this way, the most recent Tourism Law, which came into force in April 2019, regulates important directions in this sector. These directions have been proposed and debated for a long time, as can be seen from the course notes *Development of the tourist destination*, of Ilie Rotariu (2008). Some examples are the IT system for reporting, information, research, and analysis, stipulated in the law as the *Romanian Tourist Activity Records System* or regional tourism organizations designated as *Destination Management Organizations* (OMD).

The Tourism Law also targets another key objective for Romania, namely the reopening of 20 Foreign Tourist Promotion Offices, this time with 2 employees to restore the link between Romania and foreign collaborators, mainly international tour operators (Gov. Press release 42, 2019).

By far the most anticipated form of tourism organization, the *Destination Management Organization* (DMO) is a legal entity that helps the local public authorities of the destination and the representatives of the private tourism companies to join forces to capitalize on the tourism potential of the destination, coordinating at all levels - marketing, promotion, strategies, etc.

The creation of a network of Tourist Information and Promotion Centers in Romania would bring a long list of benefits such as differentiating and streamlining of attributions and activities, improving tourism products, decentralizing decisions, maximizing benefits at all levels, developing collaboration between all involved and/ or affected.

In the past, the lack of collaboration between the private environment and the public sprang from the performances that Romanian tourism could have reached (OG 58, 1998).

As the *Romanian Tourism. Statistical routine (various editions)* shows, the 2008 economic crisis has had an impact on tourism in Romania. Although the number of foreign tourists has increased steadily compared to the reference year 2009 in most accommodation units (except for the camps and pre-school camps for which it was the best year), in 2010 it was registered a decrease in the total number of Romanian tourists with 139,131 people; the most affected touristic reception structures, but not the only ones, are the tourist cottages, the camps for pupils and preschools, bungalows, chalets, and tourist stops.

The year 2011 came with increases in the number of tourists, both foreign and Romanian, in all establishments of tourists' reception, apart from campsites. Overall, the situation was similar in 2012, with the only difference being that both campsites and camps and accommodation spaces on ships recorded fewer tourists than in the previous year.

2013 was not favorable for tourist inns, hostels, school and pre-school camps, camping sites and accommodation spaces on ships. However, the other accommodation units had to cope with the 256,664 Romanian and foreign tourists who came in addition to 2012.

Nor 2014 did not bring accommodation spaces on boats and camps at the top of travelers' preferences in Romania. In addition, tourist motels, villas and chalets, as well as vacation villages also recorded losses. In 2015 only tourist cottages and chalets, camps and accommodation spaces on the ships recorded fewer tourists than in 2014.

Holiday villages, camps, and camps for school children and preschool children were not very successful in 2016, when they registered fewer tourists than in 2015, despite the country's rising trend. However, it was the first year of the analyzed period in which the accommodation spaces on the boats experienced an increase in the number of tourists. For motels, campsites and tourist cottages in Romania, 2017 has meant decreases in the number of tourists accommodated, but also the best year for tourist inns, holiday villages and tourist stops.

In 2018, the last one of the analyzed period, there were decreases in the number of visitors for the tourist hotel, the campsites, and the Romanian holiday villages; the number of Romanian tourists increased to an impressive figure of 10 million, contributing significantly to the total number of tourists, which was close to 13 million; the largest number of tourists in the analyzed period was registered for 10 of the 15 tourist accommodation structures analyzed.

The year 2017 came with a new law, GD24/2017, which provides in the organizational structure of the Ministry of Tourism a Bureau of Administration Societies. Under the new law, 16 companies were transferred to the Ministry of Tourism, represented by the Office of Administration Societies.

Attracting investment and/or privatizing owned companies, together with post-privatization controls where appropriate, are the main objectives of this Office. Given the disastrous management of the first wave of post-revolution privatizations and the deplorable situation with many attractive properties, we can only hope that the Office of Administration Societies consists of a team of professionals who will ensure that their state will not get worse.

Among the latest initiatives undertaken by the Ministry of Tourism, there is also STAR CITIES - *Sustainable tourism for development of river tourism in cities*, meant to unite the efforts of local authorities with those of private entities in order to create the necessary framework for the development of the infrastructure for the specific activities of this type of tourism in the cities crossed by large enough rivers, beginning in Bucharest.

The second conclusion that can be drawn by analyzing the period after the economic crisis in 2008 is that it had repercussions especially on Romanian tourists and on low-cost accommodation structures, despite positive trends from the country level in most of the analyzed period. The main reason for this effect was that those most affected by this crisis were those who had low or very low incomes and who were forced to spend their holidays at home.

Case study - Bihor

The sustainable development of tourism can be achieved by regulating it so that the responsibility for keeping the destinations clean and safe and that the penalties for not doing so are clear, by promoting all the valuable destinations through Destination Management Organizations and Tourist Information and Promotion Centers in Romania and outside it. This can be achieved also by investing in all the physical structures, the basic services, the systems, and the facilities that represent the foundational tool for economic activities, or simply put, in the infrastructure, so the before mentioned destinations are reachable: transportation, water, quality of life rules, internet and many more.

Analyzing statistics, we can see that although wholesale, retail, repair of motor vehicles and motorcycles represent the activity with the largest number of active local units both in 2010 (6104 units) and in 2015 - the last year registered in 2017 by INSS (5920 units), tourism occupies a major place among the activities undertaken by Bihor.



In 2010, there were 774 micro-enterprises, 95 small enterprises and 10 medium-sized enterprises in the activity *Hotels and restaurants* and 269 micro-enterprises and 18 small enterprises in the category *other services activities*, which also include the CAEN 79 code, namely *Activities of travel agencies and tour operators; other reservation and tourist assistance services*. Most figures have seen a positive evolution and in the year 2015 there were registered 768 micro-enterprises, 113 small enterprises and 14 medium-sized

enterprises in the activity Hotels and restaurants and 298 micro-enterprises and 12 small enterprises under the category *Other service activities*.

Although tourism is not one of the basic occupations in the North-West development region, nor in Bihor County, the fact that both the trend of the local units active in tourism and the four economic indicators are increasing, it helps us to realize that the inhabitants of the area have also noticed the potential of this area.

Another index of this is the degree of mobilization of local authorities and private companies in Bihor County, which have successfully implemented the ideas proposed by the Ministry of Tourism to be able to achieve the objectives of the Master Plan 2007-2026 without much effort, even before that they become mandatory with the newest Tourism Law.

Gross and net investment in hotels and restaurants, as well as other related activities, are unimaginable. Thus, in 2010, a total of 6,795 million ROL was invested in the North-West region, translated into 4.852 million ROL net; of which Raw 294 million ROL and ROL 165 million were used to develop hotels and restaurants and ROL 40 million and ROL 31 million were used to develop other activities. At these figures, Bihor County contributed 111 million lei gross and 81 million lei net through investments made in hotels and restaurants, and 8 million lei gross and 6 million lei net through investments made in other activities.

At the level of 2015, we can observe that the trend of all four indicators was increasing, so the Northwest region grossed 11,830 million gross lei and 8,994 million lei net when it came to investments, out of which 343 million lei gross and 229 million lei net targets hotels and restaurants in the region, and 92 million lei gross and 59 million net lei target other activities.

In Bihor County, the investment trend is also rising, totaling 2,330 million gross ROL and 2,024 million ROL net. In the local hotels and restaurants, 118 million lei gross and 78 million lei were invested, and in the other activities 15 million lei gross and 11 million lei net.

Analyzing the situation of turnover, gross investments, net investments and personnel in the years 2010 and 2015 in the North-West development region, Bihor County, tourism-related activities, it is easy to see that although tourism is not one of the main activities in the North-West region or in Bihor County, the related business figures are important. Within the region, in 2010, hotels and restaurants contributed 1,116 million lei, and the other activities, with 1,007 million lei, to the total turnover of 91,222 million lei. Also, in 2010, hotels and restaurants brought 298 million lei and the other activities 171 million lei, to a total of 21.748 million lei of the turnover of Bihor County.

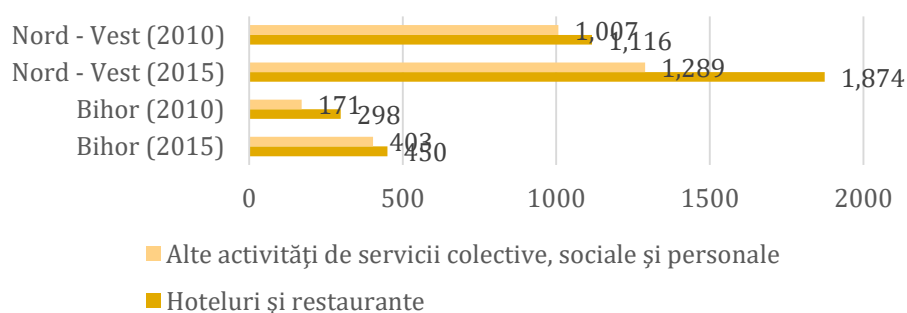


Figure 2. Change in turnover in 2010 and 2015 (ROL million)

Source: own representation based on data taken from Romanian Tourism. Statistical routine (various editions)

In 2015 positive variations are observed for the two CANE rev. 2 from the level of the development region and from the county level. Thus, in 2015, the turnover from the North-West region increases by 34.109 million lei, reaching a total of 125.331 million lei, out of which 28.637 million lei come from Bihor County.

In the North-West, the total turnover of hotels and restaurants is 1,874 million lei, to which Bihor County contributes 450 million lei. In the region, the total turnover for another collective, social and personal service activities reach 1,289, of which Bihor County is owed 403 million lei.

When it comes to the number of people employed in the North-West region of Romania in 2010, there are a total of 490,638 employees, of which 20,253 work in hotels and restaurants, and 8,063 people work in other related activities tourism. In the same year, a total of 116,212 employees were registered in Bihor County, out of which 5,502 people worked in hotels and restaurants and 1,484 people in other tourism-related activities.

In 2015, 556,808 people worked in the North-West region of Romania. Of these, 23,307 worked in hotels and restaurants and 10,513 in other activities. Bihor County contributed to these figures with a total of 128,068 employees. 5,926 of them worked in hotels and restaurants and 2,313 in other collective, social and personal service activities, including those related to tourism.

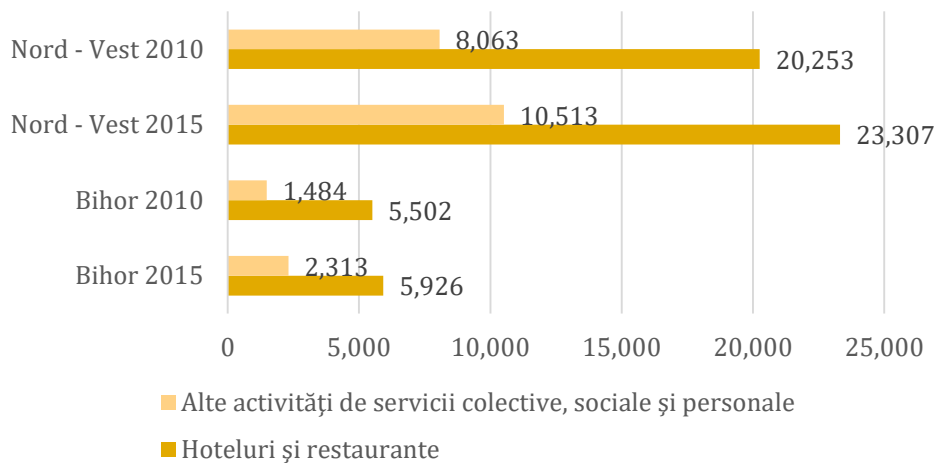


Figure 3. The variation of the tourism sector personnel in the years 2010 and 2015 (number of persons)
Source: own representation based on data taken from Romanian Tourism. Statistical routine (various editions)

Sustainable Development Strategy of Bihor County 2014-2020 helped to unify ideas on sustainable tourism with the strategy of the Ministry of Tourism and Master Plan 2007-2026. Within it, the main tourist areas of the county are analyzed.

The main tourist activity in Oradea - Felix/ 1 Mai, balneary tourism, enjoys an extended season due to the thermal qualities of the waters. However, Oradea can be considered a tourist attraction in terms of the architectural objectives that are remarkable at the national level. Cefa Natural Park, Avenului area, Vârciorog area, Dobrești area are adjacent areas where various activities such as fishing, equitation, caving or climbing can be practiced. The Plain of Crișuri and Ier is covered by vineyards where wine trails are often organized.

A great concentration of tourist areas is found in the area of the Apuseni Mountains, which impresses through the karst touristic area, but also through an impressive number of caves (160), in the summertime and through the area suitable for winter sports in the cold season (CJ Bihor).

There are 13 tourist information centers in Bihor County, which aim to promote local, regional and national potential, thus becoming an active tool used to provide relevant data to both Romanian tourists and foreign tourists. Promoting local identity and the authenticity of the destination are other important objectives that tourist information centers are pursuing.

After the analysis, we can conclude that Bihor County is an example for the other counties due to its rapid adaptation to the needs identified in the tourism market, the efficient organization despite the lack of a legislative framework to manage this type of associations, the absorption of funds and their injection into key areas, the success of all these initiatives and many others, which translated in 2017 into a record number of arrivals in the county - 477,194 people staying in the available structures.

Conclusions and further developments

The most important theories regarding regional development and sustainable tourism are the ones promoted by the communist party between 1960 and 1989, namely "*regulate, expand, modernize and specialize the Romanian tourist network*" (Rădulescu & Stănculescu, 2012), but with a 2019 twist – the internet and the automatization.

A first conclusion about the evolution of Romanian tourism between the years 1700, from the appearance of its first forms, until 1989, to the fall of the regime that made efforts to turn it into a priority, with extension to the next years, is related to the authorities reporting to this economic sector. In other words, Romanian tourism has flourished as long as its profitability has been taken into account; the option of putting into use, used in the post-communist era, has led Romania slowly but surely to the queue of the tourist destinations because of the lack of interest from the location managers.

Since then, for a long time, the State seemed to have forgotten the contribution that tourism has to the budget and had no initiative for the popularization of Romania as a holiday destination. From this point of view, expressing Romania's desire to enter the European Union and all that followed has had a positive effect on this sector; partly due to the funds received, but mainly due to the pressure to provide quality services. So, willingly or not, the Romanian Government makes efforts to show its country touristic potential.

Another conclusion of the analysis is that although not all state legislative initiatives have been received warmly by entrepreneurs, most of them have been successful. We can say this due to registered numbers, but also because although due to social media influences and TV shows such as the *Island of Love* or *Asia Express*, the Romanian and foreign tourists are to choose between Romania and the Asian countries with a tropical climate, Romania has sustained an increase in the total number of tourists, both Romanian and foreign. That means that most legislative initiatives are helpful, but as they require funds and hard work, they are not implemented everywhere yet.

Summarizing the results, the involvement and efforts of the State to bring Romania to its full tourist potential are admirable; we recall the initiative of the Property Management Offices, its direct intervention in the economy to impose legitimate landmarks and conditions for the actions of the companies, the promotion of tourism at national and international level and so on, the injection of its own and foreign funds into tourism. These can be all considered best practices because of their great results.

Particularly in Bihor, the county taken as a case study, the Government's efforts show in many ways - in the Romanian and foreign found absorption, in a large number of tourist information centers, etc., but mainly in the numbers of Romanian and foreign tourists accommodated and the relative turnover in Romania's GDP.

The analysis also shows that tourism is a profitable area in Romania too, but it is sensitive to the situation of the congruent industries: the educational system - creating a sufficient number of Hospitality Excellence Centers to train tourism specialists and raise the general level of services; infrastructure - the construction of roads, bridges, paths, huts, stopovers, ecological toilets and garbage bins, to facilitate access to, and help with, the tourist attractions; ecology - tree planting and dressing to preserve Romania's name as "*Europe's lungs*", sanitation of places visited by tourists, etc.

The most important recommendation for the national decision makers, the next steps to be taken, having established that the current policies are helping tourism flourish, but they are not enough on their own, is first to direct fund absorption in the destinations that lack the basic facilities, second to train the local decision maker in sustainable tourism and third to find suitable penalties for the local structures when they do not respect the standards of quality in tourism.

The most important recommendation for the local level would be to take Bihor County's example, not wait for the national structures to make a move and take the matter into their own hands, as it is proven to be possible.