

Country study

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Détente Consultants

CALYPSO STUDY ON SOCIAL TOURISM ROMANIA



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1. SUMMARY

Romanian stakeholders have a sensibility for social tourism issues. They are interested in the improvement of their existing social tourism policy in collaboration with other European countries or in the participating to the creation of new European social tourism mechanism.

There are two main public actors in the Romanian social tourism field:

- **The National Pension and Other Social Insurance Funds** plays a critical role in supporting social tourism through the system of subsidized or free spa treatment vouchers for retired persons or disabled adults. But due to the low number of vouchers in comparison with the increasing number of retired persons, these vouchers are quickly running out.
- **The Ministry of Education, Youth and Sports** takes care of the 'youth camp' mechanism that sustains local student tourism.

The families who faced difficult social circumstances do not receive specific supports.

The Ministry of Tourism, which is now integrated into the Ministry of Regional Development, has launched at the beginning of 2009 the Romanian holiday tourism voucher mechanism. Until now and due to economical crisis, the system hasn't met a great success among the private firms and was more followed by public administrations that bought vouchers for public servants (70% of the holiday voucher were given to public servants in 2009). But due to the government financial crisis in 2010 national and local public institutions do not have the right to include gift and holiday vouchers to the public servants in their budgets.

Romania has 6 major off-season national tourism programs that can fit for foreign tourists and that can be easily adapted for the target groups but these programs are not promoted outside.

The public and private sector in the tourism field wish to get involved in European social tourism development.

2. FOCUS ON EXPERIENCES OF AND MECHANISMS FOR INTERNATIONAL EXCHANGES

1. Romanian Holiday Voucher Program

The Romanian Holiday Voucher Program is open to all public institutions and all private firms. All the employees and the public servants can benefit from the holiday vouchers program if their company or the public institution has decided so. The holiday vouchers are bought directly to the issuing company by the firms who distribute them to their employees. The holiday vouchers are fiscally deductible. The firms purchase the holiday vouchers and there is no participation of the employees and no grant from the State.

The only limitation is that the private firm must have made profit during its preceding fiscal year.

2. The Spa social tourism program

Every year, the National Pension and Other Social Insurance Rights (CNPAS) implements a special Spa Social Tourism Program for retired and disabled people. The CNPAS distributes 'free vouchers' for retired people who suffer from a disability and 'subsidised vouchers' for retired people. Depending on its budget, the CNPAS sets the number of vouchers that will be distributed. The CNPAS receives a part of the vouchers beneficiaries in its own spa locations that are managed by the "TBRCM" SA, the public company for spa treatment and recovery of work ability. The other beneficiaries use their vouchers in private spa locations that have a contract with the CNPAS. The contracts with the spa locations are renewed every year through a national tender. With these vouchers, the retired people get a stay of 18 days with breakfast, lunch and dinner included and two spa treatments per day. The cost of a subsidised treatment voucher is:

- 70% of their monthly pension for a stay during the peak-season period (between 15 May and 31 August)

- 50% of their monthly pension for a stay during the off-season period (rest of the year)

3. The National Off-Season Tourism programs

The Romanian Professional Tourism organizations in collaboration with the Ministry of Regional Development and Tourism have set up six national off-Season tourism programs. These programs are not designed for a specific target group but can be easily adapted if it is the case. The people who belong to the target groups and who have the possibility to go on holiday without a direct grant from the state are already using these discounted off-Season offers. Until now, these programs have never been promoted abroad. The Calypso program may sustain the promotion of these programs and the collaboration with foreign partners. The fact that Romanian tourism industry is represented by professional tourism collaboration that already collaborate with the State and that have a strong sensibility on social tourism issues will make easy the participation of Romanian stakeholders to the existing European mechanisms or to the creation of new ones.

2.1 Structures and players

1. **The Ministry of Regional Development and Tourism, Committee for Tourism Development.**

The Ministry of Tourism has launched last year the Romanian Holiday Voucher Program and is in charge of the promotion of the National tourism off-Season offers created by the various Romanian professional tourism organizations.

2. **The Federation of Romanian Tourism Employers (FPTR)**

The federation is represented in the whole country and its representatives are members of every County Council Social Committee. The FPTR is in charge of the organization of two major National off-season tourism programs: "One week at the seaside" and "One week at the mountain".

3. **The Travel Agencies National Association (ANAT)**

ANAT acts as an organization that protects the interests of Romanian travel agencies. Its contribution to the implementation of the National off-season tourism programs and of the Holiday Voucher Program is important. Most of the regional tourism promotion organizations are linked to the ANAT. The association is currently collaborating with the Ministry of regional development and tourism for the promotion and the implementation of the program "Early booking 2010". ANAT wishes to promote this program abroad next year.

4. **The National Association for Rural, Ecological and Cultural Tourism (ANTREC)**

ANTREC is an NGO founded in 1994 and a member of the Rural Tourism European Federation. ANTREC has 3,000 members and is represented in 32 Romanian counties. ANTREC is mainly in charge of rural tourism promotion. It is also responsible for the implementation of the off-season tourism program "One week in the countryside".

5. **The Spa Tourism Employers Association (OPTBR)**

OPTBR has 60 members in the most important and the majority of Romanian spa resorts. OPTBR is in charge of the promotion of Romanian spa tourism and leads lobby actions to protect the interests of its members. The association is in charge of the organization and the promotion of two National off-season tourism programs: "The spa decade" and "A week of recovery in a Spa".

6. **The Ministry of Labour, Family and Social Affairs**

The Ministry of Labour, Family and Social Affairs is in charge of two institutions that play an important role in Romanian social tourism:

- The National Authority for Disabled People (ANPH)

The ANPH implements measures at the national level for the protection and promotion of disabled people rights. It is also in charge of the elaboration of strategic actions to improve the social situation of this target group. ANPH is implementing the project 'Disabled Mobility' – an information campaign aiming at raising awareness among disabled people and those with reduced mobility about their rights, in conformity with the (EC) Regulation nr.1107/2006 that

details the rights of persons with disabilities and persons with reduced mobility when travelling by air.

- **The National Pension Fund and Other Social Insurance Rights (CNPAS)**

CNPAS is in charge of the management of the national pension fund and of the social insurance fund for people suffering from work accidents and occupational diseases.

Every year, the CNPAS implements a special Spa Social Tourism Program for retired and disabled people. The CNPAS distributes 'free vouchers' for retired people who suffer from a disability and 'subsidized vouchers' for retired people. The CNPAS sets the number of vouchers that will be distributed and receives a part of the vouchers beneficiaries in its own spa locations that are managed by the 'TBRCM' SA, the public company for spa treatment and recovery of work ability. The other beneficiaries use their vouchers in private spa locations that have a contract with the CNPAS. These contracts are renewed every year through a national tender.

7. The Ministry for Education, Youth, Sport and Research

The Committee for Student Program is in charge of the students' camps rehabilitation and expansion. All the students from public and accredited private universities have access to these camps. The Committee is also in charge of the youth camp organization and management.

8. SIND Romania

One of the largest accommodation networks in Romania is inherited from the former communist trade unions leisure system. SIND Romania runs a total of 15,500 beds in 24 hotels, 25 villas, and a holiday camp for children and youth. SIND has launched a specific off-season offer 'Seashore for all' ("litoralul pentru toți") for its resorts situated on the seaside. In fact, SIND acts as a travel agency that proposes special discounted offers to employees in the framework of an agreement passed between the employees and their company's trade union.

2.2 Segmentation profile

Senior citizens	
User profile (socio-economic profile, travel patterns, demographics)	On the first of January 2010 Romania counted 3,155,990 persons aged 65 and above. In November 2009, there were 4,754,000 retired people living with social insurance funds, with an average monthly income of 180 euro. In November 2009 there were 776,700 retired peasants living on social insurance funds, with an average monthly income of 75 euro.
Organisation in charge	The Ministry of Labour, Family and Social Affairs The National Pension Fund and Other Social Insurance Rights
Duration of stay	No statistical data concerning the travel patterns of retired people. However, retired people can benefit from granted or free vouchers for a spa holiday. The duration of the stay is 18 days with breakfast, lunch and dinner included and two spa treatments per day.
Main holiday destinations	No statistical data or specific survey. 70% of spa resort tourists are 50 years old and above. 80% of them go only for spa treatment.
Average spending during holidays per year	No statistical data or specific survey. For the retired people who get subsidized vouchers for a spa holiday, the cost of a holiday is: <ul style="list-style-type: none"> • 70% of their monthly pension in peak-season period (between 15 May and 31 August) • 50% of their monthly pension in off-season period (rest of the year) During the Spa holiday, 50% of the retired people spend less than 100 euro for extra expenses during their 18-day stay.

Holiday participation statistics	<table border="1"> <thead> <tr> <th data-bbox="580 309 748 501">Number of tourists (First Quarter of 2009)</th> <th data-bbox="751 309 914 376">Total number</th> <th data-bbox="917 309 1070 501">Number of tourist going on 1-3 overnight stays</th> <th data-bbox="1074 309 1262 501">Number of tourists going on 4 overnight stays</th> </tr> </thead> <tbody> <tr> <td data-bbox="580 506 748 573">Retired tourists</td> <td data-bbox="751 506 914 528">348,975</td> <td data-bbox="917 506 1070 528">200,872</td> <td data-bbox="1074 506 1262 528">106,917</td> </tr> <tr> <td data-bbox="580 577 748 645">65 years and over</td> <td data-bbox="751 577 914 600">168,329</td> <td data-bbox="917 577 1070 600">93,922</td> <td data-bbox="1074 577 1262 600">44,765</td> </tr> </tbody> </table>	Number of tourists (First Quarter of 2009)	Total number	Number of tourist going on 1-3 overnight stays	Number of tourists going on 4 overnight stays	Retired tourists	348,975	200,872	106,917	65 years and over	168,329	93,922	44,765
Number of tourists (First Quarter of 2009)	Total number	Number of tourist going on 1-3 overnight stays	Number of tourists going on 4 overnight stays										
Retired tourists	348,975	200,872	106,917										
65 years and over	168,329	93,922	44,765										
Barriers and reasons for non-participation	<p>The holiday spa treatment voucher is embedded in the tradition of Romanian social tourism and represents the only way to go on holiday for the majority of retired people. There are fewer vouchers distributed every year, while the retired population is growing. So the majority of the applicants do not get the valuable voucher.</p> <p>The income of retired people is very low and does not even allow them to satisfy their essential needs.</p> <p>Retired people do not have much free time. In rural area, they are mostly involved in subsistence agriculture. In urban area, they look after their grandchildren and take care of housework.</p>												

Young people							
User profile (socio-economic profile, travel patterns, demographics)	<p>In 2006, the 20-30 year old population represented 3,378,270 persons.</p> <p>In 2009, 1,000 students got a free holiday in a youth camp and 72,000 young people aged between 18-26 years took a holiday in a youth camp.</p> <p style="text-align: center;"><u>Youth access to the labour market¹</u></p> <table border="1" data-bbox="580 1391 1278 1559"> <thead> <tr> <th data-bbox="580 1391 863 1458">First semester 2009</th> <th data-bbox="866 1391 1054 1458">Occupation rate</th> <th data-bbox="1058 1391 1278 1458">Unemployment rate</th> </tr> </thead> <tbody> <tr> <td data-bbox="580 1462 863 1559">Young people between 15-24 years old</td> <td data-bbox="866 1462 1054 1485">24%</td> <td data-bbox="1058 1462 1278 1485">21.30%</td> </tr> </tbody> </table>	First semester 2009	Occupation rate	Unemployment rate	Young people between 15-24 years old	24%	21.30%
First semester 2009	Occupation rate	Unemployment rate					
Young people between 15-24 years old	24%	21.30%					
Organisation in charge	The Ministry for Education, Youth, Sport and Research						
Duration of stay	<p>Average duration of a governmental organized youth camp is one week.</p> <p>Average duration of a holiday abroad is one week.</p>						
Main holiday destinations	<p>Holiday destinations depend on the season: ski resort in winter and on the Black sea coast in the summer.</p> <p>Festival and cultural events tourism.</p> <p>Bulgaria and Greece because of the low cost of all-inclusive offers.</p>						
Average individual spending during holidays per year	<p>Generally, the average individual spending per day is estimated at 25 euro (accommodation included).</p> <p>In the national youth camps, one night and 3 meals per day cost</p>						

¹ "MARKET ANALYSIS OF THE ROMANIAN TOURISM MARKET", Euromonitor, 2009.

	between 6 and 18 euro per person. Generally, the young people who go abroad prefer all-inclusive offers between 200 and 250 euro for seven days.
Holiday participation statistics	No statistics available
Barriers and reasons for non-participation	Financial difficulties, summer jobs, university calendar.

Families facing difficult social circumstances

User profile (socio-economic profile, travel patterns, demographics)	569,838 families have no income receive social support from the national social insurance fund. 194,294 single-parent families receive social support from the National Social Insurance Fund.
Organisation in charge	The Ministry of Labour, Family and Social Affairs Department of social help and family policies
Duration of stay	No statistics available
Main holiday destinations	Families visit in the countryside or wilderness camping
Average spending during holidays per year	No statistics available
Holiday participation statistics	No statistics available
Barriers and reasons for non-participation	No specific support exists for families, so financial difficulties are one of the main barriers. In rural areas, families are involved in subsistence agriculture and small cattle farming. Chronic illnesses.

Adults with disabilities

User profile (socio-economic profile, travel patterns, demographics)	In July 2009 according to the National Institute of Statistics there were 595,338 disabled adults in Romania, 17,013 of them were living in public or private social centres. In 2009, the average monthly pension for a disabled adult was of 60 Euros. Retired disabled people can benefit from a free treatment voucher given by the Pension Social Insurance Fund.
Organisation in charge	The Ministry of Labour, Family and Social Affairs The National Authority for Disabled People
Duration of stay	No statistics available
Main holiday destinations	Spa resorts for disabled adults with free treatment vouchers. Countryside: Family visits when it is possible. It depends on the level of mobility and handicap.
Average spending during holidays per year	No statistics available
Holiday participation statistics	No statistics available
Barriers and reasons for non-participation	Adults with disabilities face 4 main problems in terms of access to tourism: inadequate facilities, lack of specialized personnel to help disabled people in tourist accommodations, lack of information about the centres equipped to host people with disabilities and financial difficulties. These problems are exacerbated by the lack of public transport equipped with special facilities for persons with disabilities.

2.3 Existing support systems and/or mechanisms

• Senior citizens

The principal support system for retired people is the system of subsidised treatment vouchers in spa resorts. Indeed, at least 80% of the treatment vouchers, available every year through the National Pension Fund and Other Social Insurance Rights, are distributed to retired people. Another type of subsidised voucher is the 'rest voucher' but retired people do not have specific rights to these vouchers and no specific data exists on their distribution.

Beneficiaries of Spa treatment and rest vouchers granted by the National Pension Fund and Other Social Insurance Rights during the period 2003-2006²:

Year	2003	2004	2005	2006
Number of beneficiaries	390 100	345 800	321 700	321 200
Spa treatment	334 800	291 700	276 300	272 700
Rest vouchers	55 300	54 100	45 400	48 500

• Young people

The principal support system for young people is the youth camp system managed by the Ministry for Education, Youth, Sport and Research. The following table describes the main types of youth camps offered in Romania during spring and summer time.

Type	Beneficiaries	Nr of beneficiaries by period	Price/day/person	Services
Easter youth camp	School children, students, young people and teachers	4,000 people Every year, 9 days in April.	Between 12 and 19 euro	Accommodation, 3 meals per day
Free national youth camp	Students (orphans or students with excellent school or sports results)	1,000 people Every year between 13 June and the 13 September One week stay	Free	Accommodation, 3 meals per day, thematic activities (visual arts, chess or foreign language lessons, trekking, etc...)
Thematic youth camp	School children, students, young people and teachers	3,728 people Every year between 13 June and the 13 September One week stay	Between 12 and 14 euro	
National youth camp	Students	72,000 people Every year between 13 June and the 13 September One week stay	Between 7 and 19 euro	

• Families facing difficult social circumstances

There is no specific system for families facing difficult circumstances. They cannot afford to send a child in a youth camp.

• Adults with disabilities

Apart from the free treatment vouchers, disabled adult citizens benefit from a transport support policy:

- One free train ticket by year
- 12 buses round trip by year
- Free use of the subway and of all public means of transportation in urban areas.

² National Institute of Statistics, 2007

2.4 Demand drivers

Senior citizens	
Constraints	<p>Lack of financial resources.</p> <p>Insufficient number of subsidised or free treatment vouchers. The government's budgetary difficulties have caused important cuts in this social program.</p> <p>Vouchers beneficiaries cannot always choose their spa resort destination and the timing of their holidays. They can give their preferences but the National Pension Fund and Other Social Insurance Rights have no obligation to fulfil their requests.</p> <p>Lack of information.</p> <p>Fear of the unknown mainly for the single senior citizens.</p> <p>Lack of time (work in agriculture).</p> <p>Lack of transport subsidies.</p> <p>Health problems.</p>
Needs and expectations in terms of destination	Spa resorts situated on the Black Sea coast.
Types of accommodation	Senior citizens wish for an increase in public and private investments for the renovation of hotels, of healing spas and even for whole resorts. Few private or public owners made the necessary investments during the past 20 years because they are a captive customer base and because the average income of a client with treatment voucher is small (300 euro for an 18-day all-inclusive stay with two daily treatments).
Activities	Health treatments
Specific equipment	Health equipment
Sensitivity to price	Very important
Seasonality aspects	<p>The two major issues that can impede a senior to go on holiday during off-season period are the following:</p> <ul style="list-style-type: none"> • A portion of retired people goes on holiday with their grandchildren during school holidays. In spa resorts for example, hotels have special discounts for children. • The necessity to participate in agricultural work.
Young people	
Constraints	<p>Lack of financial resources. The national youth camp offer is quite expensive for Romanian students.</p> <p>Lack of information. For example, only 10% of the young people know the existence of the youth hostels offer.</p>
Needs and expectations in terms of destination	<p>Discounted all-inclusive offers in mountain or sea resorts in Romania.</p> <p>Main European cities for city breaks.</p>
Types of accommodation	No specific requirement. Various kinds of accommodations are suitable for young Romanians. They will appreciate the upgrading of Romanian camping equipments.
Activities	Cultural and sport events.
Specific equipment	The development of leisure activities in Romanian resorts. Leisure parks, aqua parks, etc.
Sensitivity to price	High sensitivity
Seasonality aspects	<p>Young students have part-time jobs.</p> <p>Young employees and civil servants can benefit from the off-season discounted offers. But young people with low income usually have their first children earlier than in Western countries, so they are constraint by school holiday periods.</p>

Families facing	
Constraints	Lack of financial resources Lack of information Lack of transport subsidies
Needs and expectations in terms of destination	Seaside or countryside in Romania
Types of accommodation	No specific requirements
Activities	Leisure activities for children
Specific equipment	Leisure facilities for children
Sensitivity to price	High sensitivity to price
Seasonality aspects	Most families would prefer to go on holiday during school holiday periods when children are free. They can go during off-season periods if they have a close relative who can take care of their children.

Adults with disabilities	
Constraints	Lack of financial resources Lack of accommodations or touristic and cultural spots with services and equipments adapted to disabled adults Lack of trained staff Lack of transport equipment adapted to disabled people
Needs and expectations in terms of destination	Spa resorts in Romania or abroad (in neighbouring countries such as Bulgaria or Hungary)
Types of accommodation	Accommodation adapted to people with disabilities
Activities	Recovery activities adapted to the type of disability. Socializing activities.
Specific equipment	Equipment adapted for disabled adults
Sensitivity to price	High sensitivity
Seasonality aspects	Disabled adults agree to go on holiday in off-season period.

3. ANALYSIS OF THE TOURISM SECTOR

3.1 Market trends

Since 1990, the economic, social and political context has not contributed to the Romanian tourism development. The privatisation process proceeded in a chaotic manner and prevented from the participation of experienced foreign investors or of serious local investors in the Romanian market. Until recently, no real investment has been made as Romanians were not able to go abroad because of the difficulties involved in getting a visa. After the enforcement of the Schengen agreement and Romania's EU entry, many citizens went to work in European countries, and a new kind of tourist emerged, 'the one who goes to visit relatives and friends working abroad'. Most trips of this particular kind were recorded in Italy and Spain, where the biggest Romanian community can be found. With the opening of borders, Romanians gained access to touristic offers in foreign countries. The main destinations for Romanians are Hungary, Austria, Greece and Bulgaria.

Very high prices for low quality services, the lack of all-inclusive offers on the Romanian tourism market and practically non-existent of entertainment opportunities caused a decrease in the number of both foreign and Romanian tourists, who turned instead towards all-inclusive offers abroad.

But due to their low incomes, most people still spend their holidays in Romania, visiting their parents, grandparents, relatives and friends in the countryside.

Main statistical data for 2008:

- The occupancy rate of the national touristic accommodation capacity is 35%
- 7,125,307 people checked into Romanian touristic accommodations. Foreign tourists represent 20% of this number. Compared with 2007, the number increased by 2.2%. The number of Romanian tourists increased by 4.4% while the number of foreign tourists decreased by 5.5%.
- The average length of stay in a tourist accommodation is 2.9 days. In tourist areas, the highest average length of stay is in the "spa resorts" (7.3 days), followed by "seaside resorts" (4.8 days).

In 2009, the Romanian tourism industry faced a decrease of 16.4% in overnight stays and of 13.8 % in terms of the number of people checking into tourist accommodations. The forecast for 2010 is not optimistic. In this difficult economical context, the Ministry of Regional Development and Tourism has elaborated last year the National Strategy for the Development of Spa Tourism and the National Strategy for the Development of Ecotourism. This year, three new national strategies will be elaborated: the Mountain Tourism Strategy, the Cultural Tourism Strategy and the Strategy for the Upgrading of Tourism Services. The aim is here to ameliorate the competitiveness of Romanian tourism

3.2 Supply of services

Apart from the treatment and rest vouchers system and the youth camp program, there are some important national off-season and early booking offers that have been launched in the framework of collaboration between the Tourism Professional Associations and the Ministry of Regional Development and Tourism. The latter funded the promotion of these tourism special programs.

• Romanian off-season special offers

1. "The spa decade" & "A week of recovery in a Spa" organized by the Romanian Spa Tourism Employers' Organization (OPTBR) between the 20th January and the 30th April

Program	Price by person	Program details
A week of recovery in a Spa	2* hotels: 68 euro 3* hotels: 83 euro	<ul style="list-style-type: none"> • 6 nights - 7 days stay, accommodation with breakfast included • 2 treatments per day • Medical examination at the beginning of stay
The spa decade	2* hotels: 154 euro 3* hotels: 178 euro	<ul style="list-style-type: none"> • 9 nights- 10 days stay, all inclusive offer • Treatment at least 7 days (2 per day) • Medical examination at the beginning of stay

Note: 20 spa hotels participate in the program.

2. "Seaside for all" organized by the Association for the Promotion and Development of Seaside Tourism between the 4th may and the 15th June

These offers are only sold by the members of the Travel Agencies National Association (ANAT)

Resort name	Nr. 1* & 2*hotels	Rate/ person/ 6 nights	Nr. 3* Hotels	Rate/ person/ 6 nights/	Nr. 4* & 5* Hotels	Rate/ person/ 6 nights
Mamaia	5	60 euro with breakfast	8	85 euro with breakfast	6	114 euro with breakfast
Eforie Nord			4		1	

Costinesti	1	60 euro with breakfast				
Jupiter	2	46 euro without breakfast				
Venus	1	60 euro with breakfast	1	85 euro with breakfast		
Vama Veche	1	36.5 euro without breakfast				

3. "One week at the mountain" & "One week at the seaside" organized by the Federation of Romanian Tourism Employers (FPTR)

Program	Price by person	Program details
One week at the mountain	1* & 2* hotels: 40 euro 3* hotels: 63 euro 4* hotels: 90 euro	<ul style="list-style-type: none"> • Period: From October to the third week of December • The price is without breakfast, accommodation service for a stay of 5 nights, starting Sunday and ending on Friday • 46 hotels participated last year to the program, 29 of them were 3*
One week at the seaside	1* & 2* hotels: 47 euro 3* hotels: 54 euro 4* hotels: 90 euro 4* hotels, breakfast included: 120 euro	<ul style="list-style-type: none"> • Period: From the 1st to the 30th September • Accommodations service without breakfast for a stay of 6 nights • 73 hotels participated to the program in 2009, 39 of them were 1 & 2* hotels, 27 were 3* hotels and 7 were 4* hotels.

4. "One week in the countryside" organized by the National Association for Rural, Ecological and Cultural Tourism (ANTREC)

Program	Price by person	Program details
One week in the countryside	2* pension: 38 euro 3* & 4* pension hotels: 50 euro	<ul style="list-style-type: none"> • Period: From the 1st to the 31th October • Some pensions offer a bonus breakfast • Accommodation service for a stay of 5 nights, starting Sunday and ending on Friday • 30 pensions participated to the program in 2009

• **Romania "early booking offer"**

"Early booking 2010":

The program was proposed by the Travel Agencies National Association (ANAT), the Federation of Romanian Tourism Employers (FPTR) and the Association for the Promotion and Development of Seaside Tourism and is supported by the Ministry of Regional Development and Tourism. Through this program, tourists can gain profit from a 30% maximum discount for national tourism packages if they book their holiday in an ANAT member travel agency between the 1st February and the 31 March 2010.

At the beginning of February, 63 tourist accommodation units were part of the program (seaside: 32 hotels, mountain resorts: 21 hotels, spas resorts: 2 spa hotels, other resorts: 8 hotels 2 of them in the Danube Delta).

3.3 Supply of services from a European point of view

• **Young people**

Young foreigners with a valid ISIC (International Student Identity Card) or IYTC (International Youth Travel Card) cards can benefit from various discounts: air and rail transportation, medical insurance and treatment, visits to museums, hotels, restaurants, bars and discos.

- **Disabled adults & seniors with limited mobility**

There are only a few accommodations or public services that are adapted to the needs of disabled people in Romania. Most of the Romanian public and private actors are not at all involved or even aware of the issue of accessibility for people with disabilities when it comes to tourism. While there is a need for massive investments in this matter, nothing has been announced yet. Romania remains a country which is inaccessible to tourists with disabilities.

- **Senior, families facing social problems and young people**

The various off-season programs mentioned above are suitable for these target groups even if they are not designed for them. Due to the important discrepancy between the average income of the population in Romania and some Western European countries, these offers could be considered social tourism offers in other countries. However, during the last 20 years, Romanian tourism suffered from an important lack of investment and for example, an offer like "a week of recovery in a spa" will be suitable for western clients once 4* hotels will be included in the program. The quality of the facilities and of the accommodations in Romanian spa resorts rarely suits the normal expectations of foreign and Romanian clients. So the suppliers and the resorts have to be carefully chosen in the context of a European social tourism exchange for example.

3.4 Sustainable tourism aspects

Romanian private actors are rarely involved and show low levels of awareness when it comes to sustainability and tourism. However, the situation is changing. The Ministry of Regional Development and Tourism has elaborated last year the National Strategy for the Development of Ecotourism. The investors who want to benefit from European funds for new investment in the tourism industry or for the renovation of existing accommodations or facilities are forced to introduce measures in line with sustainable tourism. Some NGOs are also very active in this field. Two labels awarded for sustainable tourism products have been created: the European Ecologic Label awarded by the Ministry for Environment, and the Ecotourism Certification System developed by Association of Ecotourism in Romania. The latter is based on the *Nature and Ecotourism Accreditation Programme* promoted by the Australian Ecotourism Association (NEAP is the first accreditation system in ecotourism) and on *Nature's Best* developed by the Swedish Ecotourism Association (the first accreditation system in ecotourism in the northern hemisphere). The Association of Ecotourism in Romania (AER) has achieved a partnership for nature conservation and tourism development among tourism associations, non-governmental associations acting in local development and nature conservation, nature conservation projects and travel agencies. All the members of the association (pension owners, tourist guides, etc.) apply and promote sustainable tourism values. The WWF is also involved in many projects throughout the country and especially in the Danube Delta area. The situation is changing, even if very slowly, and mainly thanks to the civil society and the public involvement. We can mention here some public actions in the sustainable tourism field:

- The Ministry for Environment elaborated in 2008 the Guide for Eco – Tourist, promoting methods for minimising resource use and production of waste during holidays.
- The "Blue Flag" programme has been implemented in Romania since 2002, for stimulating the quality of the Romanian Black Sea coast beaches at international standards.
- As a member of the Association for Tourist Promotion of the Countries along Danube - "Die Donau", the Ministry of Tourism participated to the establishment of the Danube Cycle Route, the Romanian part being 1140 km long, between Bazias and Murighiol.
- In 2008,, the EDEN – European Destinations of Excellence programme of the European Commission, has been implemented In Romania.
- The ministry collaborated with the tourism stakeholders in the Danube Delta region for elaborating the Strategy for Tourism Development in Danube Delta, with the tourism

stakeholders on the Black Sea coast for elaborating the document regarding the integrated management in the coastal area of Romania.

- For supporting sustainable hotel management, the project *Sustainable Development of Tourism Cleaner Production and Corporate Social Responsibility*, has been implemented by the United Nations Industrial Development Organisation, the National R&D Institute for Industrial Ecology (INCD EcoInd) and Opportunity Associates-Romania.

3.5 Feasibility of social tourism

The stakeholders and the operators interviewed wish to see a development of social tourism in Romania. The subsidized spa voucher system is still a very important social tourism mechanism, even if the number of beneficiaries will decline this year due to the government's budgetary restrictions. This interest for social tourism within the tourism industry is linked to the economic and social situation of the majority of the population which cannot afford to go on holiday if there are no special discounted programs or State grants. However in the short-term, social tourism is in difficulty due to, on the one hand, the government's limited financial capacity to sustain social programs and, on the other hand, because private operators cannot offer lower prices than the ones proposed in the off-season program described above. Moreover, private operators participate more and more in these kinds of programs because of the economic context and the high seasonality of Romanian tourism. However, the low profitability rate generated by the participation to these programs cannot allow the private accommodation owners to renovate their facilities. This is particularly the case in the field of spa tourism.

So the existing social measures and the special off-season offers will continue but all the operators are in fact waiting for the end of the financial crisis, which could create new clients and allow them to slowly increase the price of tourist packages. The operators are of course open to participate to new national or international mechanisms and interested in attracting foreign tourists in the framework of the existing or in the new programs.

4. LEGISLATIVE PERSPECTIVES

- **Holiday Vouchers**

The emergency law nr 114, published in December 2009, limits clearly the number of possible beneficiaries of holiday vouchers. Indeed, since 2010, national and local public institutions do not have the right to include gift and holiday vouchers to the public servants in their budgets. Last year, 70 % of the holiday vouchers were purchased by national and local public administrations. The holiday voucher system seems unlikely to go ahead.

- **Spa tourism and special off-season offers**

Foreign tourists have the right to purchase the two spa season offers 'A spa decade' and 'A week of recovery in a spa' but they will have to pay separately the two treatments that are included in the package. Indeed, the treatments are partially reimbursed to the Spa hotel owner by the social national insurance fund only if the customer is a Romanian citizen. It is the duty of the foreign citizen and more particularly of the E.U citizen to try to be paid back by his country's own social insurance fund. Considering the very low price of spa treatments in Romania, foreigners do not consider generally this issue as a hindrance and few tried to be reimbursed once back in their countries.

5. DEVELOPMENT OF PRODUCTS FOR SOCIAL TOURISM

The potential development of social tourism products in Romania must be considered differently for the national market and in the European market context. Indeed, there is a real discrepancy between the average incomes of the target groups in these countries compared to most of the European countries. This difference is at the State level as well. The financial capacity of the Romanian State to sustain a social tourism mechanism is low compared to the financial capacity of Western European countries for example. The national budget per capita in Romania is almost nine times less than in France.

- **Romanian social tourism market**

Social tourism mechanisms were inherited from the communist period when it was mainly managed by trade unions and the Tourism or Health Ministries. Social tourism has continued in the last years mainly for retired and young people through youth camps and treatment vouchers mechanisms. The Romanian sensibility in favour of social tourism is real but there is a real demand/supply gap as the state does not have the financial capacity to launch large new social tourism measures. So, all the public stakeholders and the NGOs are open to studying the feasibility of participating with other European partners in the development of new social tourism products, even if it means to start at a small scale, if there are opportunities for grants.

The development of social tourism must be made in collaboration with the private sector as the state cannot afford to create specific social tourism infrastructures and equipment. So it is clear that the lack of profitability for the private sector is one of the main barriers to the development of social tourism. The Romanian spa tourism industry is a good example. Through this mechanism, most of the private operators accepted to rely on the retired people subsidized by the spa vouchers mechanism. The incomes were considerable but the profitability was low and the private companies have not made any new investment to renovate their facilities. Today, most of these hotels do not respect or reach the quality standards to attract foreign tourists or non social Romanian tourists.

- **European social tourism market**

The off-season offers launched by the Romanian Tourism Professional Organisations are not designed for the Calypso target groups but can easily be adapted and may become interesting social tourism offers for these groups except for the disabled adults. Indeed, there are few facilities for disabled people in Romania. For the moment, these offers have not been promoted abroad. The Professional Tourism Organisations wish to promote their offers through the Calypso program, if a web portal is created for example and, depending on the result of the study, may adapt their services to the specific target groups.

Moreover, it may be crucial for the development of Romanian social tourism to participate to a European program giving public and private companies the opportunity to attract foreign tourists interested by social offers and belonging to the Calypso target groups. For example, the opportunity to receive foreign disabled people will stimulate the development of specific facilities and will benefit to Romanian disabled people.

6. WEB PORTALS

The following web portals dedicated to tourism have been identified:

- National association for Cultural, Rural and Green Tourism (ANTREC): www.antrec.ro
- Association for the Promotion and Development of Seaside Tourism: www.asociatia-litoral.ro
- Romanian's Federation of Hotel Industry (FIHR): www.fih-romanianhotels-org.ro
- Tourism Employers' Federation (FPT): www.rotravel.com/fpt/
- Romanian Tourism Employers' Federation (F.P.T.R.): www.fptr.org
- Romanian Spa Tourism Employers' Organization (OPTBR): www.spas.ro

ANNEXES

LIST OF INTERVIEWEES

Name of the interviewee	Position	Organisation	Type of organisation	Interview date
Mr. Traian Badulescu	Press Officer	ANAT	Professional Organization	02.02.2010
Ms. Cristina Loghin	General Secretary	RENASIS (EAPN Romania)	NGO	04.02.2010
Ms. Diana Gospodaru	Dir. programe	ISIC Romania	NGO	05.02.2010
Ms. Rodica Georgeta Pencea	Secretar General	OPTBR	Professional Organization	08.02.2010
MS. Ildiko Matyas	President	Association Youth Hostel Romania	NGO	10.02.2010
Mr. Eugen Vasile	Director	SIND Romania	Private Company	12.02.2010
Ms. Maria Stoian	Presedinte	ANTREC	Professional Organization	15.02.2010
Ms. Iulia Dangulea	Counsellor National contact point	Ministry of Tourism	Public Authority	16.02.2010

LIST OF DOCUMENTS

Studies:

- *REVISTA DE TURISM NR 2: POLITICI DE PROMOVARE a TURISMULUI SOCIAL ROMÂNESC*, Preparator univ. Pavel STANCIU, Universitatea „Ștefan cel Mare” Suceava.
- *ANUARUL STATISTICA 2007, CAPITOLELE: ASISTENTA SI PROTECTIA SOCIALA SI EDUCATIE* - INSS
- *STATISTICA TURISM 2002—2006*, INSS.
- *MARKET ANALYSIS OF THE ROMANIAN TOURISTIC MARKET*, Euromonitor 2009.
- *BAROMETRULUI DE OPINIE PUBLICA – TINERET 2008*” (Starea socială și așteptările tinerilor din România) referitor la turismul in strainatate, (MECTS).
- *STATISTICI ANPH 2009*, Asociatia Nationala a Persoanelor cu Handicap.
- *SECTIUNEA „PROIECTE AER”*- Asociatia de Ecoturism din Romania.
- *DEMOGRAPHIC AND ECONOMIC INDICATORS*, Euromonitor 2009.

Website:

- Ministerul Dezvoltarii Regionale si Turismului : <http://www.mie.ro/>
- Ministerul Educatiei, Cercetarii, Tineretului si Sportului : <http://www.edu.ro>
- Casa Nationala de Pensii si alte Asigurari Sociale : www.cnpas.org
- Asociatia Nationala a Persoanelor cu Handicap: www.anph.ro
- Ministerul Muncii Familiei si Protectiei Sociale: www.mmssf.ro
- Asociatia Nationala de Turism Rural, Ecologic si Cultural – ANTREC : <http://www.antrec.ro/>
- Asociatia pentru Promovarea si Dezvoltarea Turismului LITORAL : www.asociatia-litoral.ro
- Federatia Industrii Hoteliere din Romania – FIHR: www.fihr-romanianhotels-org.ro
- Federatia Patronala din Turism – FPT: www.rotravel.com/fpt/
- Federatia Patronatelor din Turismul Romanasc - F.P.T.R.: www.fptr.org
- Organizatia Patronala a Turismului Balnear din Romania – OPTBR: www.spas.ro

GOOD PRACTICE DESCRIPTIONS

Holiday voucher in Romania			
Name of the expert conducting research	Jamil Benabdallah		
Country Target group involved:	Romania Not specific to one or all the target groups. The Romanian holiday voucher program is accessible to all public institutions and all private firms. The only limitation is that the firm must have made profits during its last fiscal year. All the employees and the public servants can take benefit of the holiday voucher program if their company or the public institution decided it.		
Description of exchange:	The holiday voucher program has started in February 2009. A law describing the norms for granting holiday vouchers has been voted by the parliament. In October 2009 it has been estimated that 6,300 people have received holiday vouchers. The average value received by employees was 400 euro. That means a total market of 2.5 million euro. The holiday vouchers were mainly given by public administrations to the civil servants. 80% of the holidays vouchers were used on the seaside and 10% in spa resorts.		
Handling of target group needs:	The holiday vouchers are offered by a company to its employees no matter the social situation, the age or the existence of disability. Retired people cannot be holiday vouchers beneficiaries. The state institutions can offer holiday vouchers only to active civil servants. Moreover, holiday vouchers are nominative and cannot be given to a third person. Holiday vouchers can be used in the travel agencies and in the accommodation units that have contracts with the private companies that issue them. The most important ones are: ROMTICKET, ACCOR, SODEXO, CHEQUE DEJEUNER, TICHET PLUS, BLUTICKET, EUROTICKET, etc. The holiday vouchers issued by ACCOR, for example, are accepted by more than 2,000 accommodation units, travel agencies or restaurants. Holiday vouchers issued by CHEQUE DEJEUNER are not accepted in restaurants. So every issuing company has its own policy. The companies that issue holiday voucher show generally on their website the units that accept their vouchers.		
Description of support mechanisms	There are no additional facilities or support mechanisms for the target groups. The beneficiaries of holiday vouchers do not have the right to get other holiday bonuses/allowances from their company.		
Description of funding mechanisms:	Private companies are responsible for issuing holiday vouchers.	The holiday vouchers are bought directly to the issuing company by the firms who distribute them to their employees. The holiday vouchers are tax-deductible. The firms purchased holiday vouchers in full.	The maximum amount that can be deductible is of 900 euro by employee each year.

	There is no participation of the employees and no grant from the state.	
Lessons learned	<p>The holiday voucher system has not been well accepted by the travel agencies because their commission on a journey bought with holiday vouchers is limited to 10%. This limitation is fixed by the law and concerns the entire commission on the holiday vouchers. Considering that the issuing company commission to a travel agency is between 2.5% and 7% of the purchase paid by holiday vouchers, which means that the travel agency remains with a net commission between 7.5% and 3% of the consumer purchase once paid the commission to the issuing company. This final commission is very low and this explains why very few travel agencies accept payment with holiday vouchers.</p> <p>The situation is the same with the accommodation industry. Indeed, even if there is no commission limitation for accommodation owners, they must pay a commission to the issuing company. A hotel chain can of course negotiate the commission and usually accept holiday vouchers but the little owners are confronted to important issuing company commission (usually more than 10%) and refuse to accept holiday vouchers.</p> <p>The tourism industry was surprised that a limitation of the commission for travel agencies has been foreseen but not for the issuing companies.</p> <p>For Romanian employees, the problem is that holiday vouchers cannot be used to buy a stay outside of Romania and that the network of accommodation units accepting the holiday vouchers is not sufficiently developed. No modification of this restriction to purchase foreign stays has been announced so far.</p> <p>As mentioned in the emergency law nr 114/2009, national and local public institutions do not have the right to include the provision of gift vouchers and holiday vouchers to the public servants in their 2010 budgets. Last year 70 % of the holiday vouchers were purchased by national and local public administrations.</p> <p>In the context of the financial crisis, few private companies have planned to purchase holiday vouchers for their employees.</p> <p>The aim of the creation of the holiday vouchers was to develop internal tourism and to fight against the black or informal tourism economy. It is partially a social tourism mechanism as some members of the target groups can take benefit of it, mostly young employees and public servants.</p>	