Update of Tourism Strategy for the Bucovina (Suceava)

(A Guideline for Further Development)

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Abbreviations

APT	Regional Tourism Association
BIT	International Tourism Fair Milan
CPA	Certified Public Accountant
FAPT	Bucovina Tourism Association
FITUR	Tourism fair in Madrid
FoA	Field of Activty
GDP	Gross Domestic Product
GH	Gerd Hesselmann
GTZ	Gesellschaft für Technische Zusammenarbeit
H&A	HESSELMANN & ASSOCIATES
HW	Hardware
ICT	Information and Communication Technology
IPK	World/ European Travel Monitor
IT	Information Technology
ITB	International Tourism Fair Berlin
MICE	Meetings and Incentives
Mo..	Ministry of…
MoE	Ministry of Economy
MoT	Ministry of Tourism
NGO	Non Governmental Organization
NTA	National Tourism Association
NTB	National Tourism Board
NTO	National Tourism Organization
PPP	Public Private Partnership
PR	Public Relation
SME	Small and Middle sized Enterprise
SoF	Source of Funding
SW	Software
THR	Tourism Consulting Company, Barcelona
TI	Tourism Industry
TIC	Tourism Information Centre
TO	Tourism Organization
ToT	Type of Tourism
USP	Unique Sales Proposition
UNWTO	United Nations World Tourism Organization
WTM	Word Travel Market

Introduction

History of the Project

The County Council of the region Suceava acknowledges that tourism plays an important role in the development of the region. For this reason, the council commissioned a tourism strategy. A summary was presented in May 2009 (see attachment 1). For the further development and completion of the tourism strategy, the county council asked the GTZ to partner this project. A memorandum of understanding between the GTZ and the Suceava County Council has been set up which specifies the roles and duties of each partner (see attachment 2).

According to this, the GTZ tourism experts were assigned the following tasks in cooperation with the tourism team of the council:

- Further development and completion of existing SWOT analysis
- Tour operator interviews in Germany – perception of the destination Bucovina
- Visitor questioning in Bucovina tourists/consumer behavior on the domestic market Romania
- Benchmarking of the destination Bucovina
- Price benchmarking
- International tourism trends
- Human resource development in tourism / tourism school.

The project was due to take place from May to November 2009. The following meetings were arranged:

Working group meeting in Suceava on May 25, 2009
Participants were the Tourism Team of the county and the GTZ team

Tourism Strategy Workshop 1 in Suceava on June 25, 2009
Participants were the working group and representatives of the tourism administration, of the private tourism sector, and tourism associations

Tourism Strategy Workshop 2 in Campulung Moldovenesc on October 04. 2009

Working Group meeting in Suceava on October 22, 2009
Working group county / GTZ

Presentation of updated Tourism Strategy Frame and Action Plan
In Suceava on November 4/5, 2009

Why Tourism Strategy

It is important for a tourism destination to develop a written, binding tourism strategy in order to

- get a common understanding of tourism, and of rules and procedures on the sector,
- create a joint platform for the further development of tourism in the Bucovina,

- make clear who the stakeholders are and what their **responsibilities** are,
- supply a **guideline** for tourism planning at community, municipality and county level as well as for general planning of issues impacting on tourism,
- **create awareness** for **tourism treasures** and the importance of their preservation and rehabilitation,
- **supply tools** and checklists for the management of tourism on all levels,
- ensure a **focus** on further developing tourism in the Bucovina in order to get most out of the investment of restricted resources,
- pave the way for inter-regional cooperation, and
- create a favourable environment for the acquisition of investments and fund raising.

Structure of the Tourism Strategy Paper

As the tourist experience and revenue generation happen at the local level, a bottom-up approach is needed for the development of the tourism strategy. In other words, the local level needs to be taken as the basis of the development, so as to include local government, local businesses and other stakeholders. There are, however, very varied levels of understanding and knowledge of tourism and its workings.

Part one therefore creates in a more theoretical way a common understanding of tourism and of its potential for the region, of basic rules and procedures on managing tourism, as well as of success factors and tools to apply. In order to use restricted resources best and to ensure an efficient development process, this common understanding of tourism is a vital prerequisite for attaining the support of all stakeholders.

In **part two**, the frame for the update and further development of the Bucovina tourism strategy will be set also in a more theoretical way. First the strategy development process with external and internal influences will be explained. Secondly the tourism strategy components such as destinations within the Bucovina, or types of tourism will be identified and defined. The outcome will be benchmark criteria for the evaluation of the current status in the Bucovina out of which necessary measures will be derived.

In **part three**, taking into consideration the framework developed in parts one and two, recommendations regarding the further development of the existing Bucovina tourism strategy are elaborated. The status quo of the tourism sector 2008/09 is described, leading to the vision statement outlining where Bucovina as a tourism destination wants to be 2013. Then, the tasks to be addressed in order to reach those 2013 goals are extrapolated, taking into consideration internal and external influences. The outcome will lead to the definition of necessary measures on the identified fields of action.

Finally, **part four** contains the action plan for the implementation of the Bucovina tourism strategy. Current and planned projects can be listed and complemented by recommended future projects for each of the different fields of activity.

Within the framework of the project, H&A was able to develop structures and processes for the SWOT analyses, need assessments, project definitions as well as schemes which give an overview of current, planned and future projects. Furthermore, we give examples of how to use these tools and structures. This leads to the proposal of a project management system, submitted in chapter 10.

It was not part of the project to develop all aspects of a tourism strategy for the Bucovina or give examples for the further development of these. For reasons of time constraint, H&A was forced to restrict the work to developing structures and formats for the further use by the partners of the project. Market research studies, SWOT analyses, need assessments, briefings, etc. are not integrated into the strategy paper but are attached. In this way, these documents can be used separately without having to consult the full strategy paper. The strategy paper presented here can thus be used as a guideline for updating, completion and expansion of the tourism strategy for the Bucovina.

Acknowledgements

The political will of the president of the county Suceava and his team to further develop the tourism sector as a key business sector of the county and the already existing tourism strategy created the basis for cooperation between Suceava county and GTZ. In close cooperation of the tourism division of Suceava with Claudiu Bradatan, Christina Architei, Laura Ursu, Marilena Leonte, Catalina Velniciuc and the GTZ experts with Dr. Carmen Chasovschi, Oana Müller, and Gerd Hesselmann the following concept was elaborated.

An important role was played by the participants at the workshops organized by County Coucil: member and delegates of Bucovina Tourism Association, Sucevita Tourism Association, Vama Tourism Association, ANTREC, Salvamont Dorna, “Ştefan cel Mare” University, Museum of Bucovinian Traditions, Ethnografic Museum from Suceava, Ciocanesti City Hall, Calimani Nature Park, Chamber of Commerce and Industry and many others. They understood that a sustainable development of tourism in Bucovina is possible only through a joint effort.

We want to thank the county and the tourism team for their support and excellent cooperation as well as all participants at our two workshops for their contributions.

They paved the ground for the elaboration of the presented frame for a permanent updating and further development of the Bucovina tourism strategy as well as for creating a common understanding of the requirements of the tourism sector and the actions needed in order to achieve a sustainable tourism development.

Part 1 (Theoretical Background)
Creation of a Common Understanding of the Basis for the Bucovina Tourism Strategy

1. Background and Rationale

1.1. *Definitions*

A working definition of **travel and tourism** is given by the World Tourism Association (UNWTO 1992):

Tourism comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes.

In general, tourism covers all traveling from A to B except for the daily traveling to work. B is situated outside the usual environment of the traveler.

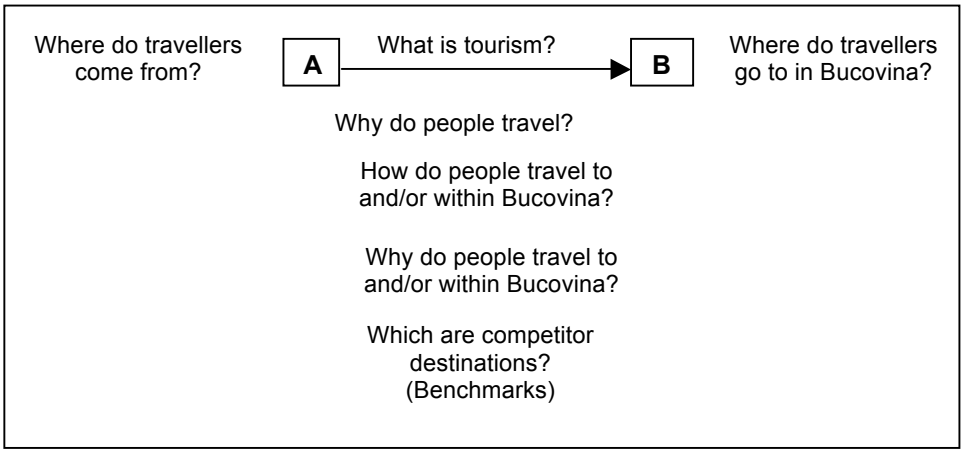

Figure 1. Questions to characterize tourists' motivation and behaviour

Within the frame of the broad tourism definition above, some main **reasons for traveling** can be identified as shown in figure 2.

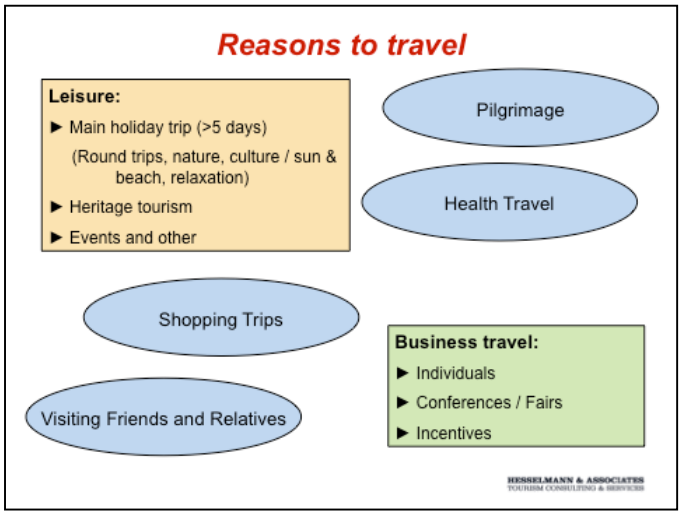

Figure 2. Reasons for travelling

Market segmentation becomes necessary because people travel for different reasons. Each segment has different marketing requirements and specific characteristics. This is also the case concerning **information** as part of the tourism product of each market segment as well as information required and communication channels used to promote the tourism offer and to address target groups in the respective market segments.

1.2. *Importance of the Tourism Sector*

Worldwide, tourism is seen as an important sector in the development of an economy.
Without any doubt, a growing tourism industry has an important positive impact on the economy and the society of a country.

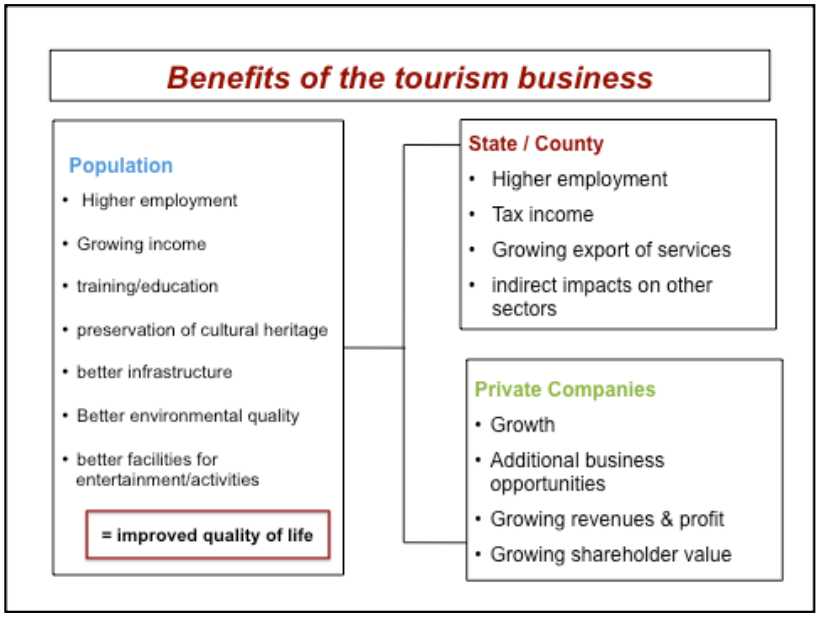

Figure 3. Benefits of Tourism Business

An attractive tourism product which meets the expectations of visitors does not only benefit these visitors but also the **local population** by means of increased employment, incomes and quality of life. Besides the population, the **state** is another beneficiary of a growing tourism industry. Tourism creates jobs across all sectors of the economy, increasing the gross domestic product, increasing tax revenues and foreign currency imports. The third beneficiary is the **tourism industry** as such, i.e. companies creating and offering tourism products and services. They will grow, achieve higher revenues, increase incomes and employment, etc., so they will increase the value of the industry as a whole. On a local and national level, tourism offers many opportunities especially for small and medium size enterprises (SMEs).

There are different classes of impacts of tourism. Besides economic impacts, tourism has ecological and social impacts, too, for example. The impact can be seen as the sum of direct impacts and indirect or induced impacts (see figure 3), but minus the revenue that goes into imported goods. This is referred to as leakage. How much higher the total impact is than the original amount of money spent by the tourist is called the tourism multiplier.

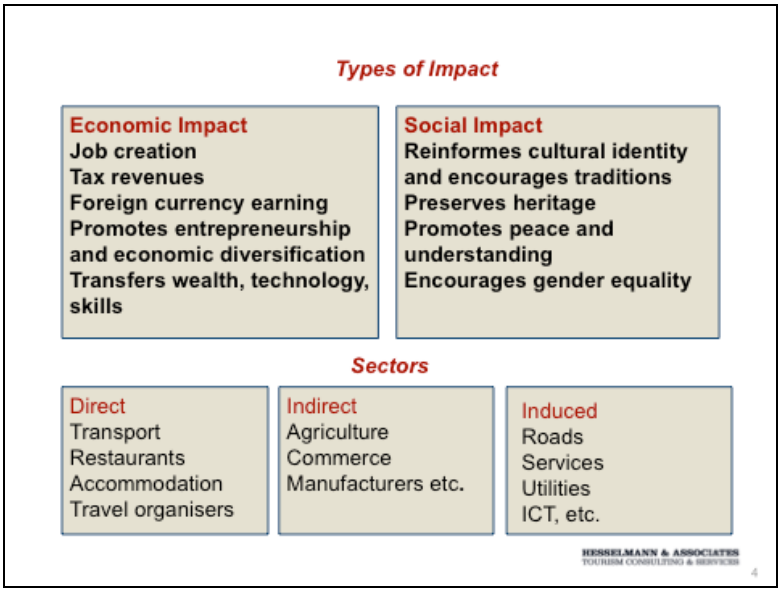

Figure 4. Economic and social impacts of tourism

But the positive impact of a flourishing tourism industry is not limited to the sectors that are directly connected with tourism such as hotels, restaurants, transport, or tourism services. Because of the ripple effect, the development of the core sectors of the tourism industry will lead to a series of economic reactions in other sectors as shown in figure 4 and help boost the number of SMEs.

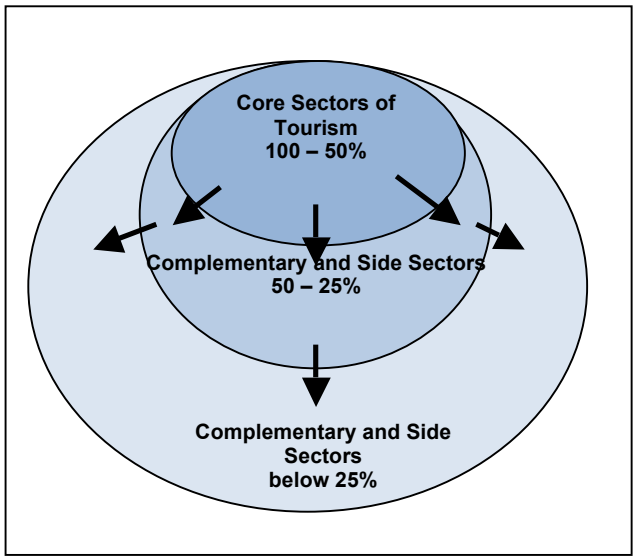

Figure 5. Ripple effect of tourism

Side sectors linked quite closely to the tourism industry, for example the textile industry, medical services industry, transport equipment, wholesale and retail industry, printing industry, information and communication technology, agriculture and so on, benefit to a high degree from tourism through the ripple effect. In addition, studies show that nearly all sectors in the entire economy benefit to some degree from tourism, even the local chemical and pharmaceutical industry, financial services industry, construction industry etc.

Nearly all of the revenues generated through tourism originate in the private sector, only a small margin comes from the public sector (see figure 5). For policy, this means that if government is serious about its support for tourism as an economic force in its country, it must ensure favourable framework conditions especially for the private sector, where the bulk of tourism revenues are generated.

As we have seen, tourism sector growth has a positive influence not only on the sector itself but also on the development of related industrial and service sectors, employment and the general economic situation in the provinces and of the country.

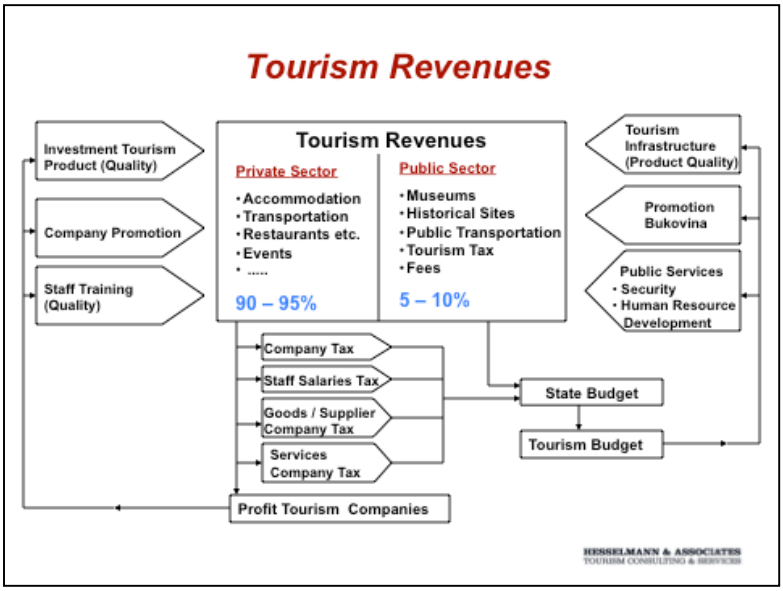

Figure 6. Sources of tourism revenues

Tourism is a business sector and as such it is part of a market economy. This means that the owners of private companies bear the business risk.

Besides the described economic aspects of tourism, one has to be aware of the **social aspects** of tourism activities. Tourism can

- accelerate the convergence between different countries and different income groups
- contribute to globalisation and the benefits of more international contacts and exchanges
- build bridges of good will, understanding and peace
- provide an important educational tool
- encourage community involvement and stimulate artistic expression

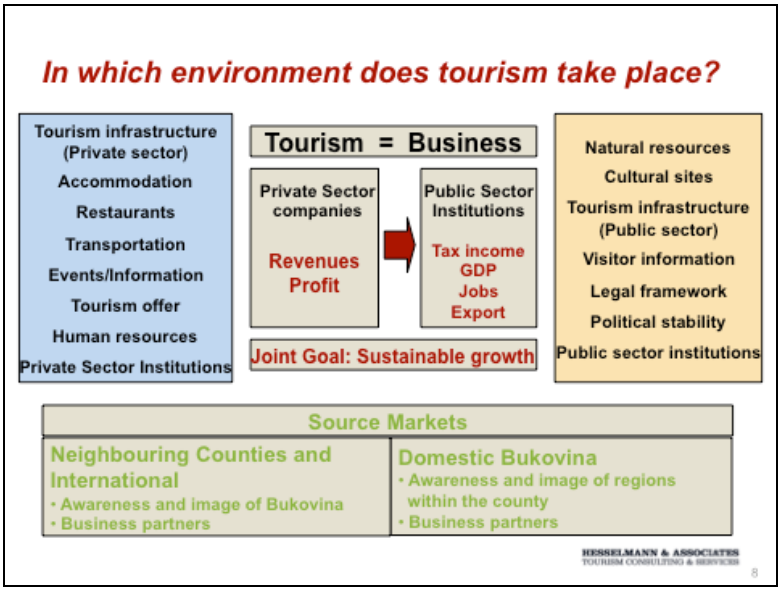

Figure 7. Environment in which tourism does take place?

The tourism sector generates revenues, which lead to tax income, contributes to the GDP and international visitors are part of the export volume of a destination. It is therefore in the interest of the state to create favourable framework conditions for a sustainable tourism development and thus for the realisation of the benefits through tourism.

Investments in tourism infrastructure and in tourism promotion by the state have to be seen as investments in future revenues and sustainable future contributions to the state budget.

1.3. *Structures of the Tourism Industry*

The tourism business takes place between the natural tourist resources and attractions on one side and the customer on the other (see figure 7). In between, there are the different levels of the value chain in the tourism industry. Whereas customers, potential visitors, travel agencies and tour operators belong to the source market, incoming agents, providers, facilities for tourism activities, and of course the natural tourist attractions belong to the destination. Between the source markets and the destination, we have the means of transportation such as airplane, train, coach/bus, car or ship.

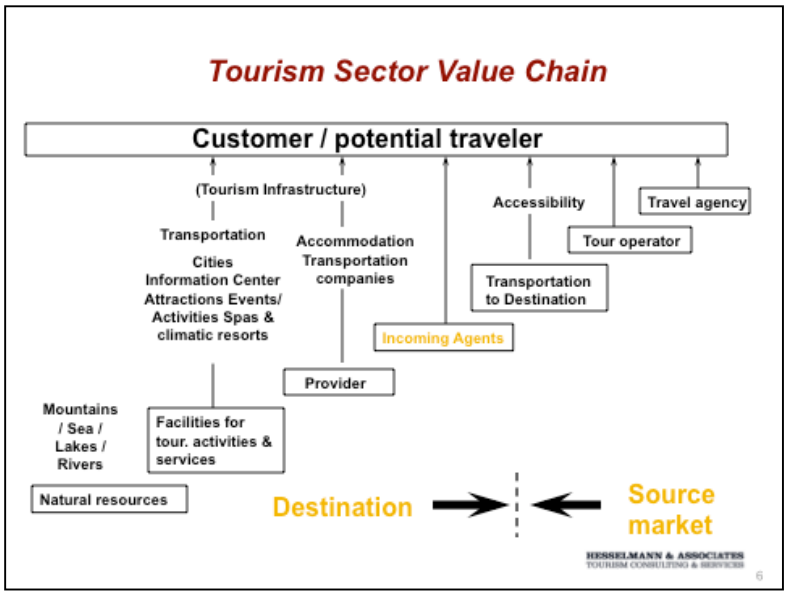

Figure 8. Tourism industry value chain

In the source markets, destinations are in competition with each other. This manifests itself in the different kinds of marketing, use of media to promote destinations and above all in the brochures of tour operators which present the tourism offer of many destinations. To achieve a strong competitive position of the destination Bucovina, all stakeholders from the public and the private sector have to pool their resources, coordinate their activities and cooperate in marketing the destination.

Destinations and tourism offers, which are well known, attractive and which have a unique sales proposition (USP), generate demand by potential visitors. This is strengthened by fruitful cooperation between tour operators and travel agencies, because they both want to satisfy the demand in their market created by the destination's marketing activities.

Even though each level of the tourism industry value chain has the means to communicate directly via internet with potential visitors in source markets, there are many reasons why it makes sense to not only focus on the web but also use the (more complex and expensive) distribution channel tour operator and travel agency. These professional intermediaries are trusted by travellers and are closer to their home, speaking their language and knowing their culture. The use of intermediaries is especially useful when, as in the case of Bucovina, the destination is not well known to the public in the source market.

1.4. *SMEs – the Backbone of the Tourism Sector*

Surprisingly, most of the businesses in all sectors of the tourism industry in Romania – achieving over 90% of revenues -are run at the local level and are classified as small and medium sized enterprises (SMEs). This obviously means that **SMEs are the backbone of the tourism industry** and need to be focussed on for effective and sustainable development within the national and above all within the regional tourism industry.

Responsibilities of Administration on all Levels Regarding SMEs

How do the national government on the one side and regional / local governments on the other side support SMEs in order to maximise their contributions to the development of the tourism sector and the economic benefits of tourism to the economy?

Responsibilities of the public sector towards SMEs are, above all, to support

- favourable legal frame works conditions
- favourable economic and fiscal conditions, e.g. financial support for investments in the tourism industry,
- improved tourism infrastructure as a basis for the private sector tourism businesses,
- guidelines for business development such as a tourism strategy for the Bucovina, as well as for the tourism destinations around the county,
- facilities for sector specific training and education,
- the supply of tourism information (e.g. sign posting), and
- the promotion of the destination Bucovina and its tourist attractions.

Responsibilities of private Sector tourism Institutions regarding SMEs

There are mainly two responsibilities of tourism associations regarding SMEs: To render needed services and to take care of favourable framework conditions. However, looking at the institutional landscape in Romania on the national as well as on the county/regional level, the question is who can take over the following responsibilities:

1. To provide **services** to tourism associations representing tourism subsectors, tourism regions, types of tourism or transport and/or direct to single SMEs.
2. To **advocate** in favour of the SMEs of the tourism sector in order to increase the public sector's acknowledgement of its responsibility as stipulated above and to take respective action.

1.5. *Issues for the Bucovina Tourism Strategy*

These issues are contained in the SWOT analysis in 8.7 “Summary Outcome SWOT Analyses. The SWOT analyses are the basis for the identification and definition of needs.

- Understanding of the interdependencies in the tourism industry and the scope of positive benefits of tourism on the economy of the destination at national, community and local administration levels.
- Awareness of the effects a solid **tourism strategy** can have on the tourism development (see Introduction / Why tourism strategy? Requires internal marketing & training)
- Status of **market segmentation** and identification of types of tourism fitting to the potential of the Bucovina (leads to improve the productivity of the tourism cluster)
- Awareness among the **local population** of the benefits of tourism. Tourism improves the attitude towards tourists, well being and finally competitiveness through their contributions. (requires internal marketing)
- Awareness of the **USPs of the Bucovina tourism offer**. (When the above mentioned issues are understood, it will lead to a preservation and protection of these assets. Requires internal marketing)
- Understanding that everybody (local population and stakeholders) can contribute to a **sustainable tourism development** and that it pays. (requires internal marketing)
- Lack of tourism **institutions** which are able to render effective services to SMEs and to advocate favourable framework conditions (see 2.5 Issues for the Bucovina Tourism Strategy).

2. Destinations in the Bucovina Seen as Tourism Cluster

Over the last decades, tourism has demonstrated that it is capable of creating wealth and economic development for a nation and employment and increased quality of life for the population. The only way to achieve this is by being competitive. Competitiveness is defined as the ability of a destination to compete successfully against its main rivals on the targeted source markets. This means a tourism destination must offer the market better value than its competitors for the same effort on the part of tourists, or the same value for less effort.

2.1. *Tourism Cluster Approach*

Evidence has shown that, as in other industry sectors, **tourist experiences** normally take place within relatively small geographical boundaries. These areas are called **clusters.** They include groupings of tourism resources and attractions, infrastructure, equipment, service providers, and other supporting sectors and administrative bodies whose integrated and coordinated activities contribute to providing customers with the experience they expect from the destinations they choose to visit.

2.2. *Competitiveness is the Key*

Competitiveness is the basis for any kind of economic, social and environmental sustainability. This must be understood and accepted before an effective framework of public-private-tourism cooperation can be established. In this context, regional tourism associations as public-private-partnership units at the county or regional level play a decisive role in achieving sustainable tourism development.

Competitiveness within the tourism destination is achieved at the local level through permanent innovation and improvements. It is, however, not enough to focus on the respective destinations but also to acknowledge that other general conditions prevailing in a

country can stimulate or destroy the competitiveness of tourism clusters. The framework conditions created by national institutions for example play an important role in enabling competitiveness.

2.2.1. Value for Effort of a Tourism Experience

In the end, everything depends on the value for effort that destinations offer to their source markets. **Effort** in this context is to a certain degree the costs of the trip that the tourist must cover, but also other deterring factors or inconveniences the traveller must overcome or accept. Tourists choose destinations if they believe they provide good value for little effort. Figure 8 shows the components which create the value for effort of a tourism experience.

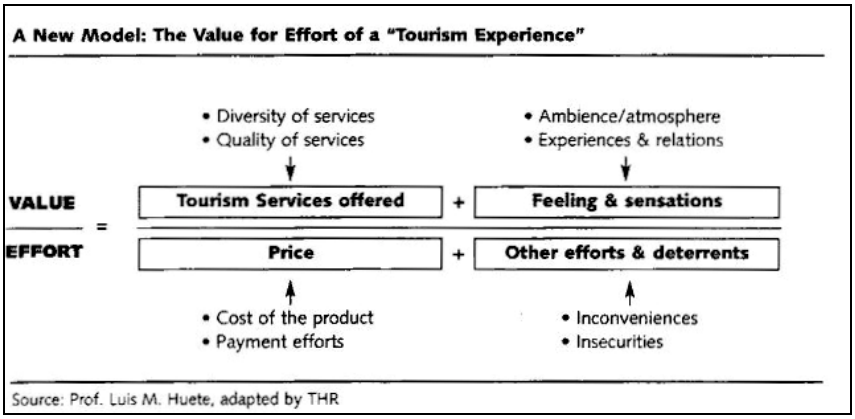

Figure 9. The Value for Effort Formula of a "Tourism Experience"

The product components which create the value can be seen in Figure 15 under 2.3.2 Product policy.

2.2.2. Influencing Factors of Competitivity

Tourism development involves the intervention of many different stakeholders – from both public and private sectors – in each destination. Although essentially a private sector activity, tourism requires government support to be sustainable. PPP should tend to focus on four main areas which lead to improved competitiveness:

- improving a destination's attractiveness,
- organizing professional and consistent marketing,
- maximizing productivity and service standards, and
- assuring sound management within the tourism system.

How the **attractiveness** of a tourism cluster can be improved is shown in figure 10. It requires a close cooperation between stakeholders on the public sector as well as on the private sector in order to achieve increased values and reduced efforts of visiting the destination.

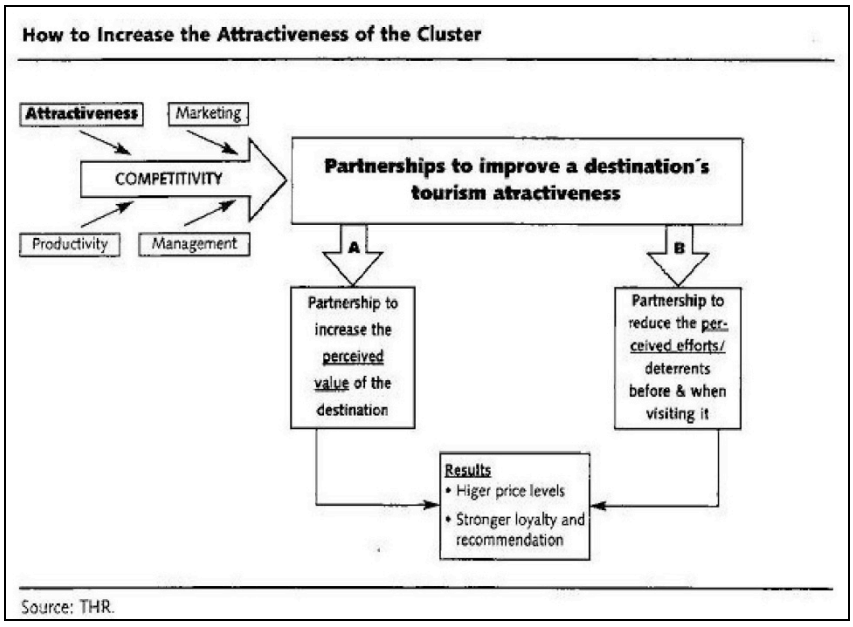

Figure 10. How to Increase the Attractiveness of the Cluster

Marketing also requires close cooperation between stakeholders from both public and private sectors. The single fields of cooperation and the targeted results are shown in figure 11. Basically this cooperation should lead to the highest marketing efficiency possible with a given, often tight budget. One way to do this is to focus tourism activities, on types of tourism with a good potential in the destination as well as to focus on source markets with the biggest guest potential for important types of tourism in the destination.

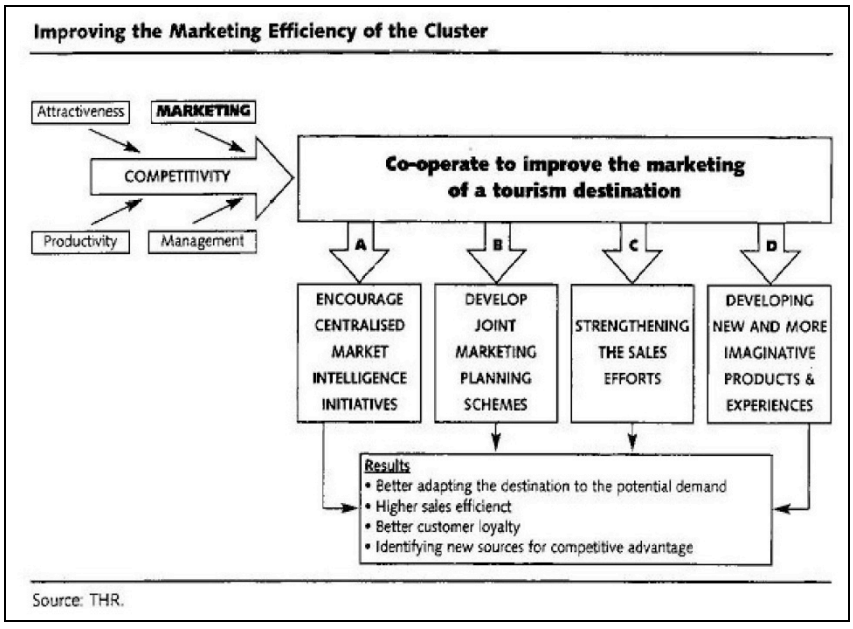

Figure 11. Improving the marketing efficiency of the cluster

The success factor marketing for achieving sustainable developments will be elaborated in more detail in chapter 2.3.

How the **productivity** of a tourism cluster can be improved is shown in figure 12. The issue is to protect, improve and use tourism assets and to improve the quality and efficiency of human resources in order to achieve a higher return on investments via higher occupancy and productivity levels.

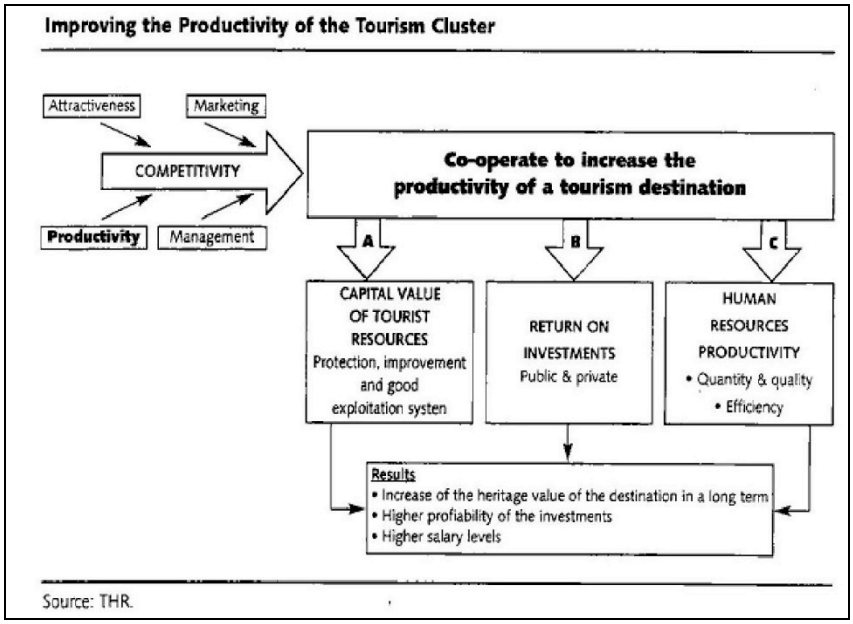

Figure 12. Improving the productivity of the tourism cluster

However without a sound **management** within the tourism system the other efforts will fail. Looking at the general understanding that tourism is

- public sector led,
- private sector driven,
- community based, and
- employment sensitive,

it becomes obvious that management responsibility of the tourism sector lies in the hands of public and private sector institutions. This requires respective tourism institutions and their close cooperation. Regional tourism associations (APTs) such as the Bucovina Tourism Association are the medium for achieving successful PPPs in a destination and thus setting the scene for sustainable tourism development in economic, social and environmental terms.

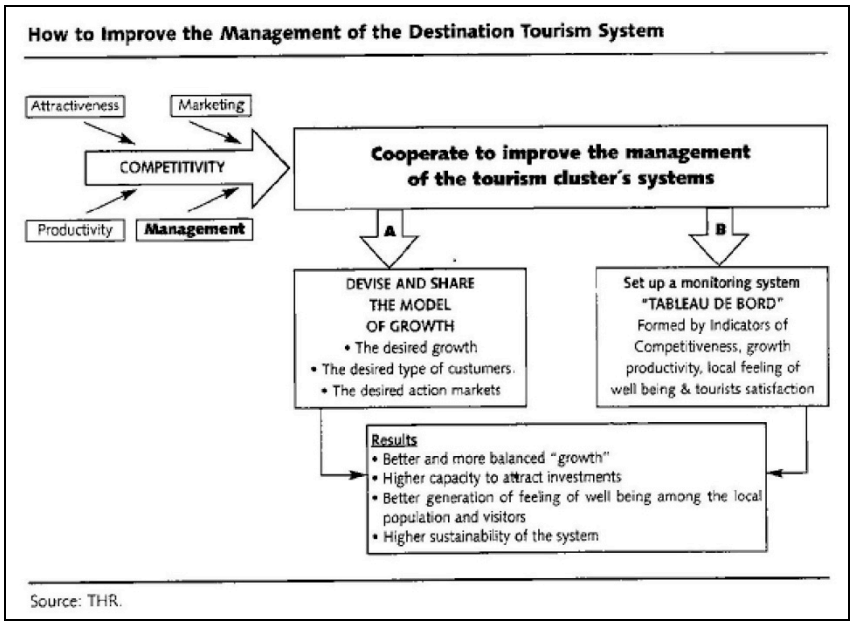

Figure 13. How to improve the management of the destination tourism system

2.3. *Success Factor Marketing*

To realize the benefits of tourism and the impacts on other business sectors, the identification, participation, contribution, cooperation, and support of all stakeholders including the local population is necessary. To achieve this, many obstacles have to be removed for e.g.

- No interest, controversial interests, egoism of single persons, prejudices, mistrust
- Lack of information, different level of information and knowledge
- Lack of qualification, poor contributions to tourism products

This shows, that **marketing begins at home** and that **internal marketing** is a prerequisite to remove potential obstacles. We therefore recommend to establish a single field of activity for **"Internal Marketing"** (see chapter 4).

2.3.1. Internal Marketing

As a first step, awareness of the impact of tourism and how each part of a society can contribute to a sustainable development has to be created. All stakeholders including the local population must know their opportunities and their responsibilities.

As a next step, the identification, participation and contribution of all stakeholders has to be ensured. The third step has to be the coordination of all suppliers and contributors to the overall tourism product, though they are in competition on their individual level of the tourism value chain.

In order to maintain a sustainable commitment and support, **transparency** regarding the ongoing activities and the achieved results has to be established.

And as the weakest component of the overall tourism product determines the overall quality of a tourism offer, the willingness for further development and training of stakeholders is requested.

2.3.2. External Marketing

The marketing mix policies product, price, communication, and distribution policy can be summarized under this success factor of a tourism destination. Marketing means to place the requirements of clients/visitors in the centre of strategy developments. The behaviour and the requirements of potential clients determine the marketing policies. It is therefore imperative to get a profound knowledge about source markets and selected target groups.

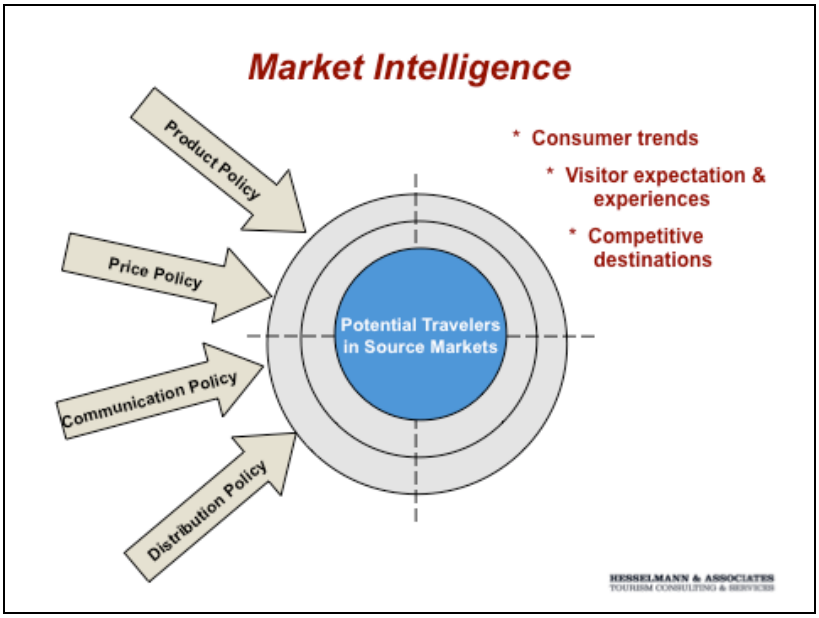

Figure 14. Marketing = customer orientation

Society changes continuously, and trends – whether economic, social or lifestyle – subsequently impact on tourism. It is important for the tourism sector to assess these changes at an early stage. Existing policies regarding products and services, marketing and investments all demand appropriate adjustments or adaptations as per changes in market preferences and behaviour.

2.3.3. Market Intelligence / Fact Finding

Knowledge management is the most important element in value creation within tourism organisations, and as such an inseparable part of production processes, decision making and tourism policies.

To ensure a sustainable success, one has to take into account past and current developments and trends such as:

- Which general trends can be realised on the current major source markets regarding consumer behaviour, consumer requirements, application of new technologies as well as emerging new competitors.
- From where do tourists come, what kind of tourism do they prefer, how do they travel and how did the different market segments develop during the last years.
- Which source markets should be tackled in the future, how is the situation on these markets in a comprehensive sense (consumer, competition, position of the Bucovina).
- Which potentials exist for the further development of the Bucovina tourism product and which market segments can be serviced best with the national and the Bucovina tourism offer.

However as marketing begins at home **internal marketing activities** have to be undertaken. To be effective, necessary measures can only be defined if the feelings, opinions and expectations of the different target groups are known. To create the basis for internal marketing measures, basic research activities have to be carried out. Among others, the current weaknesses in the cooperation of the private sector and in public private partnership have to be identified.

Consequently market intelligence & knowledge management have to cover the situation as described in the destination in order to remove obstacles on the way to a sustainable tourism development as well as the situation on identified source markets including competitors on these markets.

2.3.4. Product Policy

Product policy can be seen under many aspects. In order to underline the need of cooperation on the private sector – though the suppliers on each level of the tourism value chain (see figure 8) are competitors, some examples are represented below:

Sustainable Tourism

The UNWTO sustainable tourism concept emphasis the balance between environmental, social and economic aspects of tourism, the need to implement sustainability principles in all segments of tourism, and it refers to the millennium development goals, especially poverty alleviation. To ensure long-term sustainability, there are the following rules, which should be observed according to UNWTO.

- Make optimal use of environmental resources that constitute the key element in tourism development, maintaining essential ecological processes and helping to conserve national heritage and biodiversity.
- Respect the socio-cultural authenticity of host communities, conserve their built and living heritage and traditional values, and contribute to inter-cultural understanding and tolerance.
- Ensure viable long-term economic operations, providing socio-economic benefits to all stakeholders.

Sustainable tourism development requires the informed participation of all relevant stakeholders as well as strong political leadership to ensure wide participation and consensus building. This shows the necessity to establish an effective internal marketing.

Achieving sustainable tourism is a continuous process and it requires constant monitoring of impacts, introducing the necessary preventive and / or corrective measures whenever necessary.

Sustainable tourism should also maintain a high level of tourist satisfaction and ensure a meaningful experience to the tourists. Raising their awareness about sustainability issues and promoting sustainable tourism practices amongst them.

Criteria for a Competitive Tourism Offer

A key to success is how a potential tourist perceives personally a destination for his vacation. This perception, which can be far away from reality, creates the basis for communication activities. This shows, how important it is, to know the situation on source markets and above all the perception of the destination on these markets.

The value / effort ratio of a tourism experience (see figure 8) is defined first by the diversity and quality of services, the ambience / atmosphere as well as experiences and relations generating the value of a tourism experience.

Secondly, it is defined by the cost of the tourism product / services, payment modes (cash / credit card acceptance) inconveniences on entering the country or poor accessibility of sites, bad road conditions, poor signs at roads as well as insecurities because of language problems determine the efforts in the above formula. The higher the value and the lower the efforts, the better the experience of tourists and the better the competitive position.



Figure 15. Components of a tourism product

The single components of the tourism product and how they contribute to the value of the tourism experience is shown in figure 15.

The tourism product is the symbiosis on the one side of people, creating the environment in which tourism takes place, and people rendering the services on the tourism sector. On the other side there is the tourism infrastructure as described in figure 7 (Tourism value chain). The population and its attitude towards tourists, as well as the employees in the tourism sector generate with their competence and friendliness the well feeling of tourists. The

tourism infrastructure comprising natural resources, cultural heritage sites and the enterprises on the tourism sector determine the diversity and the quality of the tourism product.

The description e.g. of cultural or historical sites are important components of the tourism product. Without appropriate tourist information, such tourism attractions / products cannot be experienced to the same degree by tourists as if there is no adequate information available, in the form of signage, leaflets, or other.

The best tourism product is of any value if it is not in harmony with the other three marketing mix components price, communication, and distribution policy, which are the next success factors to look at in more detail.

2.3.5. Price Policy

Consumer trends and the increasing competition in the tourism industry show that price policy is a sensitive issue. As major contributor to efforts in the value / effort ratio of a tourism experience (see figure 8), the price of the tourism product is a dominant success factor.

Prices depend largely on the basic prices of the single product components, on the fiscal framework influencing the calculation scheme as well as on the price policy taking into account the competitive position.

2.3.6. Communication / Promotion Policy

A comprehensive marketing strategy does not only cover **external communication** directed at potential domestic, intra-regional and international travellers plus the travel industry in source markets, but also **internal communication** directed at all parts of administration, at the business sector and finally at the local population. A general consensus regarding tourism and the support of the tourism industry leads to highly attractive tourism products and content for tourists visiting the country.

Internal Communication / Marketing

We have learnt above that a sustainable tourism development requires the informed participation of all relevant stakeholders. Therefore internal marketing measures are directed towards very diverse target groups such as the private sector tourism industry, the public sector tourism administration, politicians, cultural institutions, tourism sites, government organizations and finally people as employees in the public and in the private sector, as well as the local population. This requires a segmentation to be able to address stakeholders in more homogenous groups on their field of activity.

External Communication / Promotion

The **external communication policy** covers issues such as

- tourist offices / tourist information centres,
- print versus electronic media,
- trade fairs / seminars for the travel industry of source markets,
- workshops,
- tours for selected journalists, etc.

Modern communication strategies for tourism destinations focus mainly on two areas. Firstly, communication strategies focus on establishing and managing the **image** of the **brand** of the

destination, and secondly, using best communication tools (such as print media, presentations, electronic marketing, etc.) with a restricted budget.

Building a brand for a destination is hugely important for marketing success. The brand is not just the logo, it is the combination of thoughts, feelings and expectations people have about visiting the destination.

The destination brand needs not only to be created and promoted but also protected. Once a brand loses its good reputation by delivering less than was promised, it is very difficult if not impossible to regain a good reputation.

As electronic media become more and more important as communication tools, a **destination e-platform** has become indispensible. The convergence of media such as telephone, TV, video, DVD's, mobile end appliances, internet, etc. offers new opportunities to reach selected target groups in a more effective way. Web 2.0 means tourists share their experiences and ratings in the public domain, but also that destinations can contribute to debates or uncertainties on web-platforms.

An important tool for addressing the tourism industry of source markets and the public at the same time is trade fair participation. Key **international trade fairs** in Western Europe are WTM (London), FITUR (Madrid), BIT (Milan), and ITB (Berlin).

The responsibility for international trade fair participation on national level has the Ministry in charge of tourism, resp. the national tourism organisation. The role of the private sector is to ensure appropriate participation and contributions of the industry. Trade fair participation should be handled in the spirit of a Public Private Partnership. Both sectors are responsible for ensuring high quality in the overall appearance of the destination at trade fairs. In the Bucovina the Bucovina Tourism Association could be the adequate PPP institution to coordinate fair participation on a regional level.

The main principle of media relations within a destination is to maintain a **consistent message** on all levels of communication. This consistency also includes the brand of the destination. A repeated, consistent message builds brand equity over time.

Although electronic media is gaining importance, **print media** nevertheless remain a vital communications tool. Again, the preparation of the material must be consistent with the established brand.

The public sector is responsible for producing print material with tourism information about the destination at all levels, i.e. national, regional and local. The institution to carry out the duties in the Bucovina is the tourism division of the county**.** The role of the private sector is to provide necessary data about the tourism offer.

2.3.7. Distribution / Sales Policy

Distribution policy covers the traditional distribution channels via tour operators / wholesalers; travel agencies / retailers (see figure 10); print media; consumer fairs in major source markets, etc. Sales have focussed strongly on electronic distribution channels which have become more and more dominant and will become more important. Traditional distribution channels such as travel agents and TOs are also adopting these new channels, e.g. TOs offering their group tours online.

Distribution covers the presentation of the tourism offer, the reservation, invoicing, accounts receivable and all necessary interaction with the client. As a single provider cannot handle all these activities on his own on all selected source markets, it is necessary to cooperate with competent and reliable partners such as tour operators. This is especially the case if they are specialised on selected products and when travellers are still lacking the confidence in new or unknown destinations. Travellers then prefer to deal with local travel agencies in the source market and tend to use tour operators with good reputations in their own country for information and bookings.

2.3.8. Marketing Mix Summary

The responsibilities for the development and implementation of a comprehensive destination marketing strategy are shown in figure 16. The public sector is responsible for the marketing of the destination and the private sector is responsible for contributing appropriate products to be integrated into the overall marketing strategy as well as for the distribution and sales of the tourism products. Figure 16 shows that PPP is an indispensible prerequisite for success on the tourism sector.

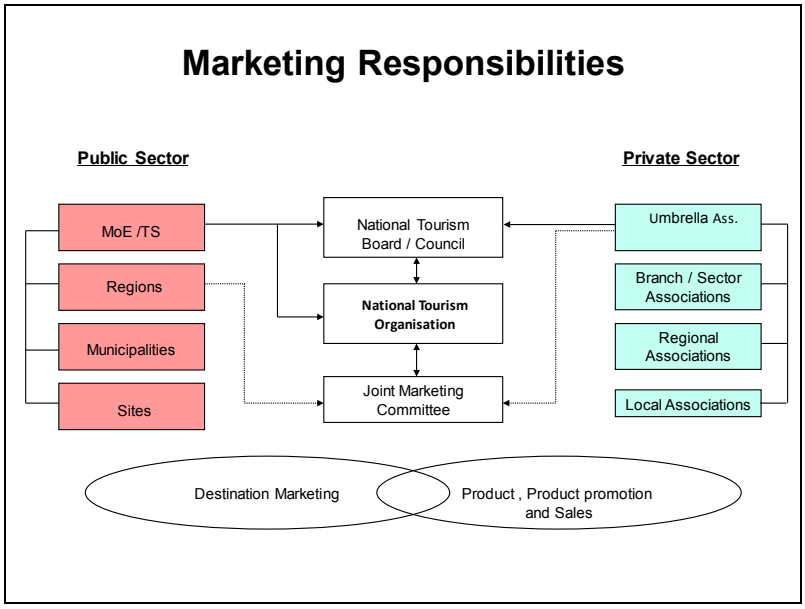

Figure 16. Marketing responsibilities

As marketing mix policies are vital success factors, marketing is an important issue for all institutions on the public and the private sector as well as for the joint PPP institutions.

2.4. *Success Factor Tourism Institutions (Management)*

There are a great number of units in the legislative bodies, in the government, as well as in county and local administrations involved in issues affecting the tourism industry. At the same time, there are a great number of companies (SMEs) on all levels of the tourism value chain (see figure 8) creating the tourism product and servicing guests.

A successful tourism development depends on favourable framework conditions for the industry. These should be created by the public sector based on proposals and contributions from the private sector. The results are competitive tourism products and services.

Advocating / Lobbying – a Vital Activity
Changes in the legal framework, among others for the business sectors, are prepared by the responsible ministries. Before becoming law, bills have to be approved by parliament on the national level or by the county council.

Officers in ministries are in general experts in legal and administrative realms, but not on specific tourism issues. Therefore they must communicate with insiders of the tourism industry when tourism-related issues arise or when bills which are relevant to the tourism industry are discussed in parliament.

As the ministries, parliament and other regional and local public sector institutions are not able to communicate with hundreds of SMEs, the business sectors have to organize themselves on national, regional and local levels in order to define their needs and positions and to make these known to the public sector institutions. These lobbying activities in favour of a business sector are a vital part of a democratic system. To be effective, it requires appropriate institutions in the public and the private sector and their cooperation through PPP institutions.

Basic Relationships
The environment in which the public and private sector tourism institutions operate is illustrated in figure 17. This environment is comprised of the parliament, the government / administration, the tourism industry on a national and international level, regions and municipalities, governmental and non-governmental organizations, the public, the media and, finally, the political, economic, social, technical and ecological spheres.

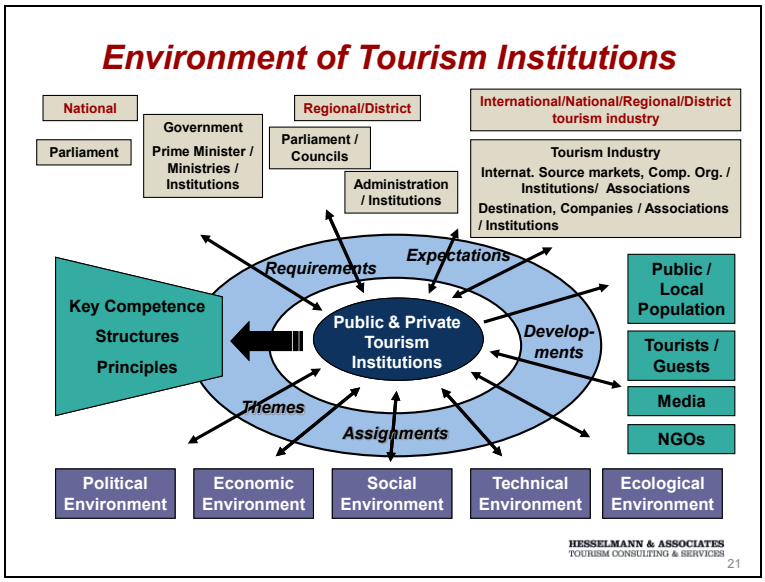

Figure 17. Environment of tourism institutions in the public and private sector

All elements of the tourism environment generate needs, expectations and other issues which need to be addressed by tourism sector institutions. In order to achieve an effective public / private partnership, all stakeholders must be aware of the importance of the tourism industry for the country and the roles and responsibilities they assume.

The institutions of the tourism industry have to meet the requirements and expectations of other institutions and must use their influence and resources to ensure favourable framework

conditions needed for the development of the tourism sector. To be able to do so, institutions have to have key competences, they need effective structures and they have to follow their defined principles. In setting up the requested institutions, the environment described in figure 16 can be seen as criteria to check whether vital relationships are adequately built.

2.4.1. Public Sector

Public sector institutions exist on all levels with an administration. On the **national level** there are the government with all ministries, parliament as the legislative institution, and government organisations such as the national tourism organisation (NTO) reporting to the ministry of tourism. As most institutions impact with their activities the tourism sector a permanent horizontal coordination is necessary in order to avoid contra productive measures. Besides a permanent monitoring of what is going on with relevance for tourism in the government as well as in parliament by the ministry of tourism, an inter-ministerial tourism council would help to ensure the horizontal coordination on the national level. On the other hand one has to acknowledge that nearly all ministries have a direct or an indirect influence on tourism with their decisions and measures. This means that the cabinet headed by the prime minister is in a certain sense the "inter-ministerial tourism council" as shown in figure 18.

Below the national level we have **tourism regions** as e.g. Banat, including two and a half counties, 42 counties and on the local level, per county a greater number of municipalities and communities. As all business is local the specific needs of the tourism sector on the way to achieving a sustainable tourism development have to be identified on the local level and then via the single levels, as shown in figure 18, be forwarded to the institution responsible for solutions.

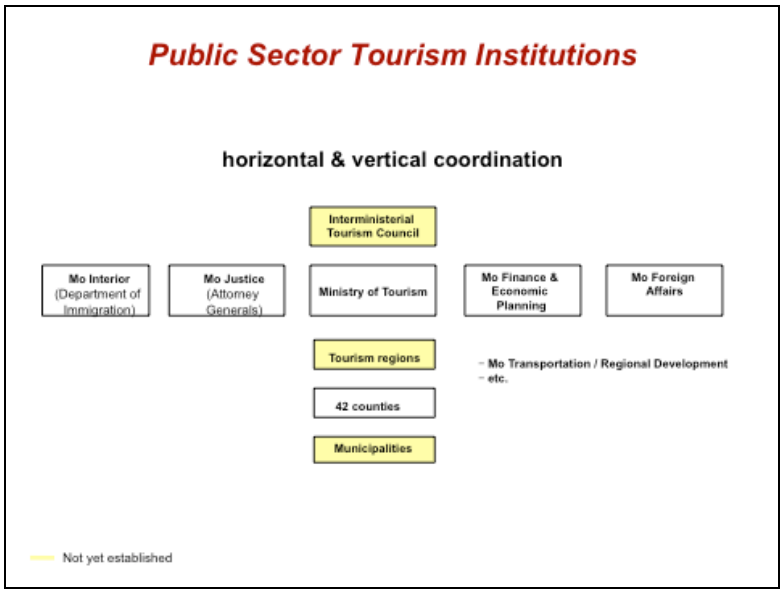

Figure 18. Public sector tourism institutions

The question is which institutions exist on the shown levels which are able to meet their responsibilities to ensure the best possible framework conditions for the tourism sector. In the Bucovina exists the tourism department in the Suceava County with a staff of five persons. They also cover the functions of the tourism information centre.

On the local level (municipalities and communities) there are no identified members of the administration responsible for tourism. However there is a number of mayors, which is aware of the tourism potential in their regions and which takes respective actions.

2.4.2. Private Sector

The elaborations on the horizontal as well as on the vertical coordination needs on the public sector count in the same way for the private sector (see figure 21).

The private sector of the tourism industry consists of the sub-sectors shown in figure 19. In large destinations where each of these sub-sectors includes hundreds of enterprises each, it makes sense to found sector associations for each of them. This enables the specific needs and issues of each sub-sector to be addressed and solved. Coordination and cooperation between these sector associations is a must, as the tourism product includes elements from a range of enterprises represented by the sector associations. In other words, they all contribute to an attractive tourism offer and must have a common interest in maintaining set quality standards and in a successful promotion by the national tourism organisation (NTO).

Apart from the **tourism sectors** above, there are more good reasons to found private sector tourism associations. Enterprises from different sub-sectors above but all situated in the same tourism region have specific common interests such as joint product development or marketing issues. Depending on the member potential, it makes in this case sense to join together in a local or a **regional association** which is then partner of the regional tourism administration.

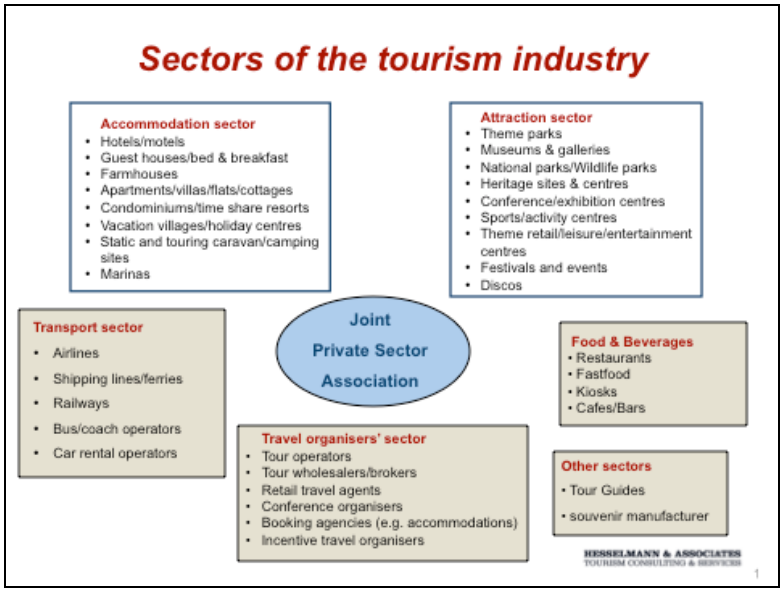

Figure 19. Sectors of the tourism industry

Product lines which have specific rules and requirements can be a third group of characteristics of tourism-related enterprises which pool resources in an association
Figure 20 gives an overview about the possible combinations of sectors, types of tourism and geographical criteria which can lead to private sector associations. Examples for product lines are adventure, culture, health, business tourism, among others, MICE (meetings and incentives) tourism, agro tourism, etc.

Tourism Sector / Criteria For Assoc. Building	Hotel	Restaurants	Transportation	Agents	Other
Adventure					
Culture					
Health					
Eco / Rural					
Business					
Regions (tourism destinations)					
Districts					

Table 1. Types of private sector tourism associations

Independent from the focus of the single association they all have to create the prerequisites which enable their members – SMEs – to achieve a sustainable tourism development. This requires services and advocating activities as shown in figure 21. As most associations suffer from a lack of financial resources, competence and capacity it makes sense to pool the limited resources in order to establish a strong and professional umbrella association which is able to enable its member associations to render needed services to their members (SMEs). Figure 20 illustrates how the umbrella association hovers above the national level associations representing the different sectors, types of tourism or destinations of the tourism industry.

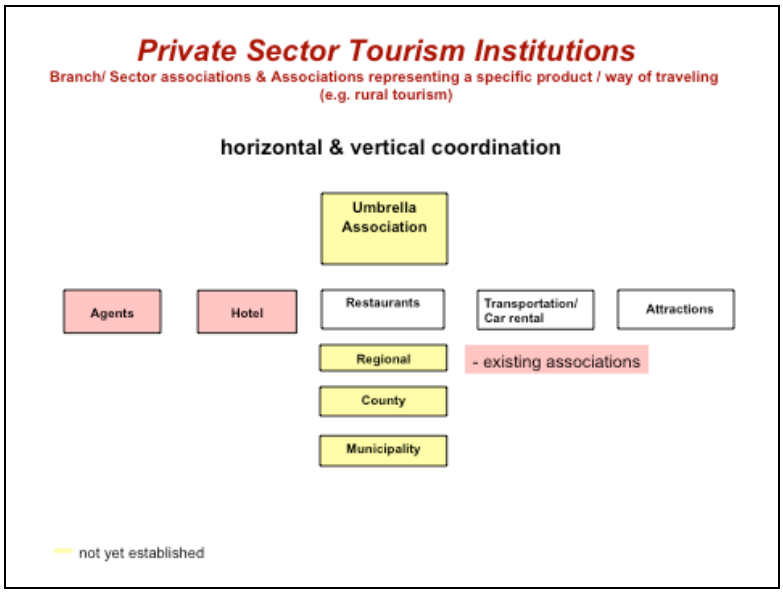

Figure 20. Private sector tourism institutions / horizontal and vertical coordination

As all business is local, vertical coordination and cooperation to the regional,county and local representations are vital. Otherwise, the concentrated power of the tourism industry cannot be used effectively to convey and enforce the interests of those at the respective level. An umbrella association of the private sector associations can ensure that the ideas and needs of the private sector are taken into account by the NTO and other public sector institutions.

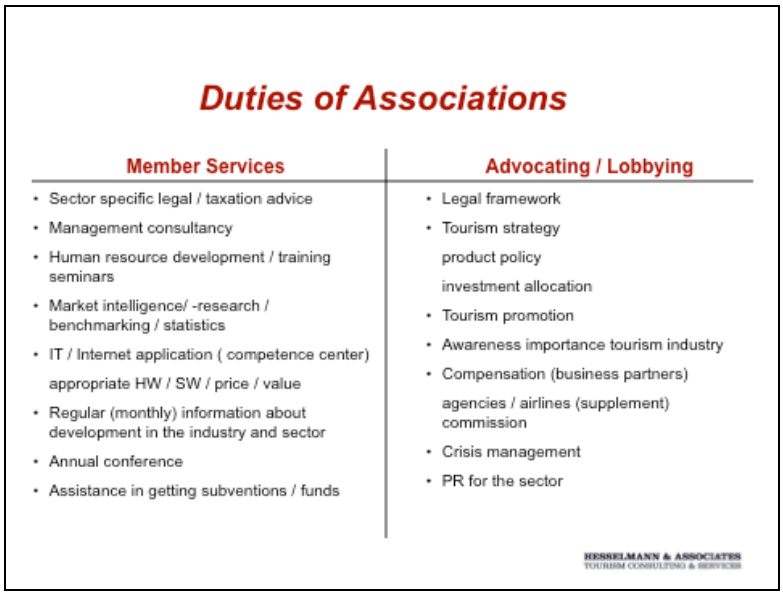

Figure 21. Duties of private sector associations

To be able to render expected services to members, to lobby on behalf of the sector (see figure 21), and finally to be recognized as a professional tourism association, various criteria and requirements should be met, such as

- representing a legitimate tourism sector,
- organized as a legally registered non-profit organization within its own jurisdiction,
- audited annually by a certified public accountant (CPA),
- including by-laws covering the basic points.

2.4.3. Public Private Partnership

The competitiveness of a tourism experience depends on a close cooperation of all stakeholders in a destination. Fields of cooperation and who is responsible for what can be seen at the examples given in figures 22, 23, 24. They prove that PPP is indispensible.

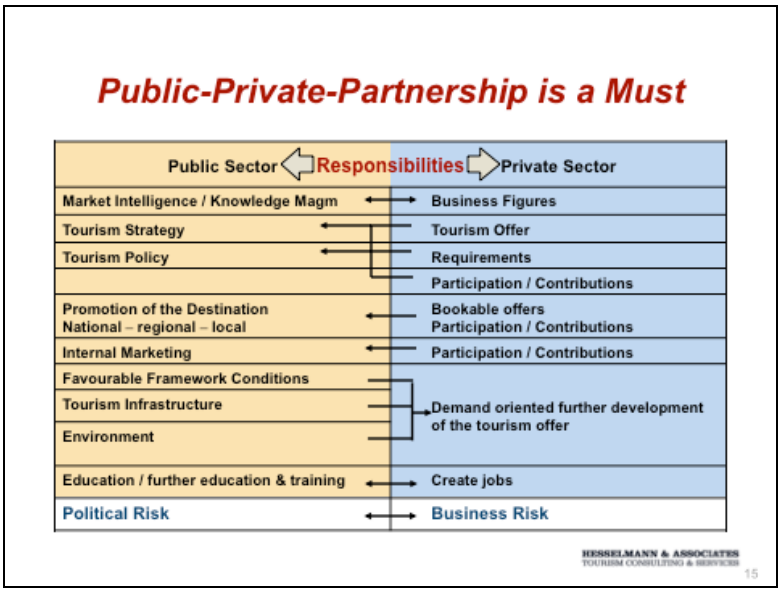

Figure 22. Why PPPs are an imperative

In marketing the public sector is responsible for a great deal of aspects of product and price policy concerning tourism products as it must ensure suitable infrastructure or legal framework conditions, etc. While the private sector companies involved in tourism itself must deliver marketable products and services, they are still dependent on the public sector set framework conditions. Associations pool in this context the marketing competence and capacities of the private sector, define the identified needs, and submit respective requirements to the administration.

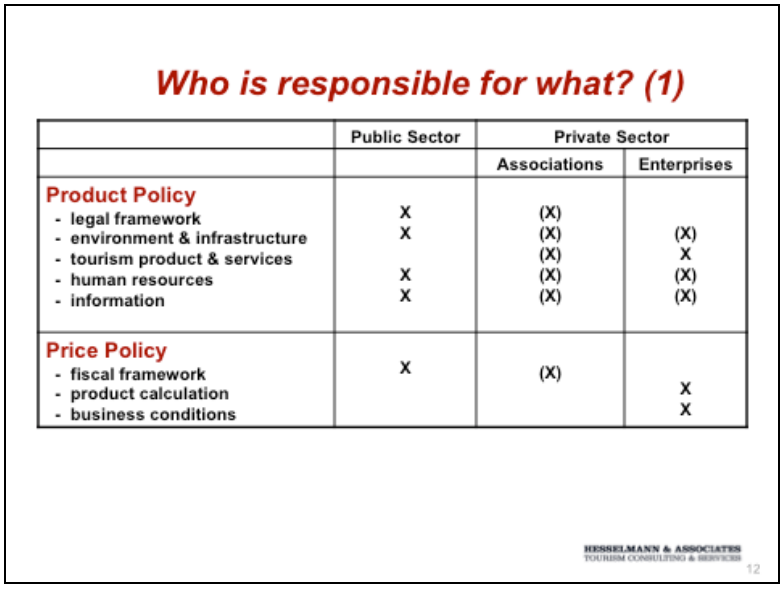

Figure 23. Marketing mix responsibilities (1)

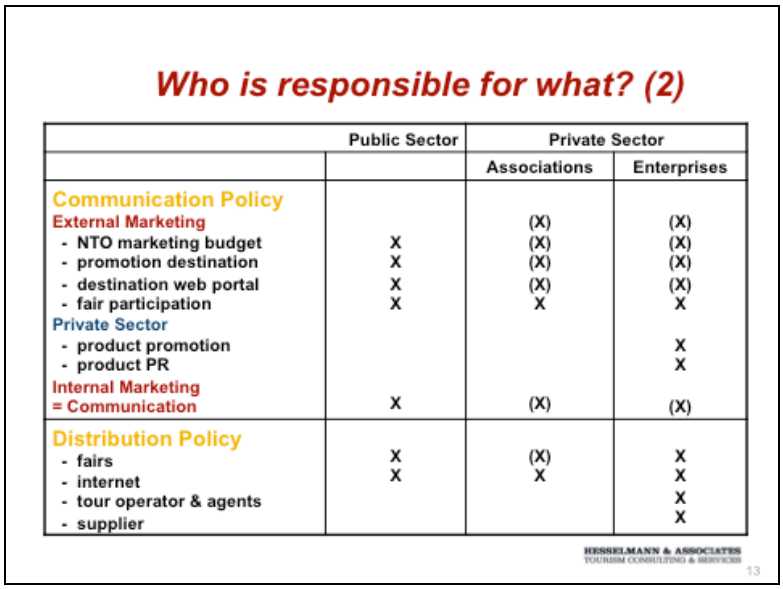

Figure 24. Marketing mix responsibilities (2)

The goals, targets and benefits of tourism for a society can only be realized if the stakeholders from within the **public sector** (government / administration / regional and local administration) and the **private sector** (accommodation / transportation / agencies / site management / handicraft etc.)

- join their creative resources and efforts in respective PPP institutions,
- coordinate their activities, and
- cooperate on single issues.

PPP has to take place on all levels and requires therefore on all levels units which are able to meet the PPP responsibilities such as the horizontal and vertical coordination and cooperation as shown in figure 27.

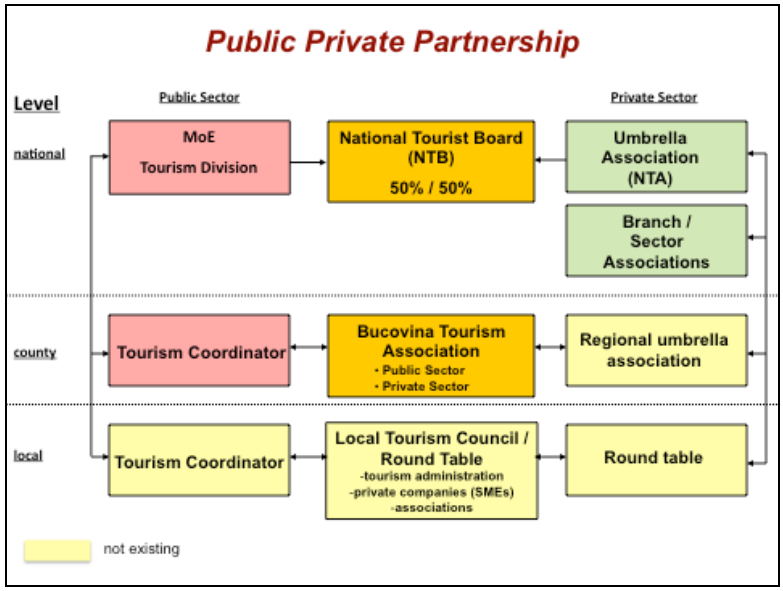

Figure 25. PPP Institution Structure

A national tourism board or council (see figure 25) must be seen as a focal point and highest decision-making body within institutional structures. This board has to be a PPP unit, composed by representatives from the public and private sectors. Such PPP units are also needed on the regional, district and local levels.

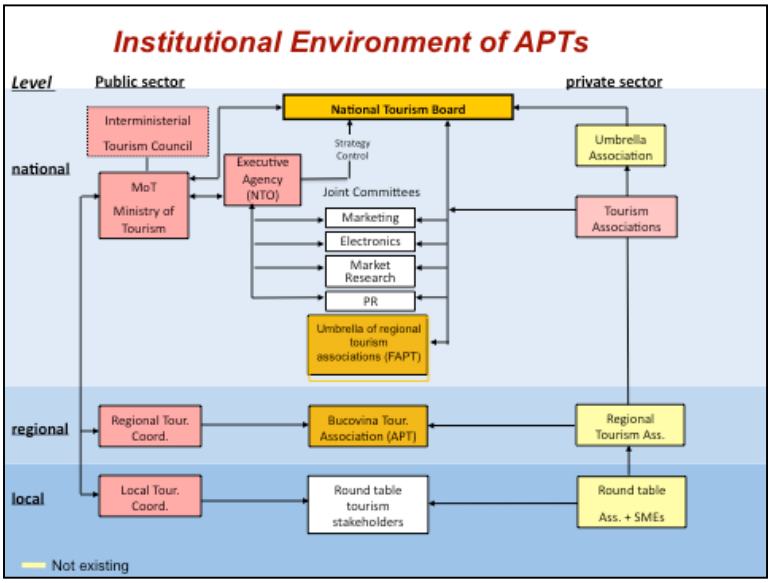

Figure 26. Institutional environment of APTs

It is subject to the fact finding within the strategy development process to identify the current status of tourism institutions in the Bucovina and to define actions in order to get the necessary institutional frame for an effective PPP established.

2.4.4. Development Levels of Tourism Institutions

Depending on the number of potential members the needed institutions on the local and on the county level can have different degrees of organisation

Informal Group

Loose grouping of people pursuing common goals

Strengths:

- Small investment outlay,
- Interested people get together,
- Initial step to define common objectives
- Possibility to coordinate activities,
- Tourism gets an identified speaker,

Weaknesses

- Poor cohesion,
- Vaguely defined objectives and strategies
- No sustainable financial basis,
- Degree of organisation depends on needs and the will of stakeholders

Formalised Groups

Grouping of people on a formalised basis.

Strengths:
- Small investment outlay,
- Stronger cohesion,
- Defined objectives,
- Learning about group dynamics systematically.

Weaknesses:
- Weak financial basis,
- Fields of activities restricted due to shortage of funds,
- No commercial activities and thus limited reach and influence.

Association

Formal grouping of people on professional basis with registered statute

Strengths:
- Clear aim on commercial activities for the benefit of members,
- Clear objectives and activity planning,
- Tight cohesion,
- Clear structure and responsibilities.

Weaknesses / Risks:
- Competence and capacity of management
- Competence, capacity, commitment of mandate holders
- Participation and contribution of members,
- Lack of Acknowledgement

If it is not feasible to establish an informal “Round Table” of the tourism SMEs, the SMEs willing to participate and to commit have the following options (see figure 26)
- To establish on county level a private tourism sector umbrella association covering all sectors, types of tourism
- To establish together with the local tourism administration a local PPP Round Table, which has the function of the local tourism council
- To join the Bucovina Tourism Association the PPP unit on county level

2.5. *Issues for the Bucovina Tourism Strategy*

These issues are contained in the SWOT analysis in 8.7 Summary Outcome SWOT Analyses.That SWOT analysis is the basis for the identification and definition of needs.

- Sustainable tourism development requires the informed participation of all relevant stakeholders, an iinformed society is required. This is an internal marketing issue.
- There is a lack of tourism institutions which are able to render effective services to SMEs and to advocate favorable framework conditions. Possible solutions are presented in chapter 2.4. Success Factor Tourism Institutions.

- Monitoring the situation in the tourism destinations of the Bucovina is a permanent issue in order to identify obstacles on the way to a sustainable tourism development, which have to be removed. Fact finding and respective internal marketing tools have to be applied to improve the situation if needed.
- Transparency is one prerequisite tourism institutions have to meet in order to get the confidence and trust of diverse member groups as well as of the public. This requires to follow defined principles and to apply internal marketing tools.
- Tourism information is one component of tourism product (see figure 15). In this context Tourism information centers (CIT) play an important role, above all for individual travelers. Are the CIT potentials used at its best? Is the private sector involved?
- Mmonitoring of impacts, introducing the necessary preventive and / or corrective measures whenever necessary.
- business sectors have to organize themselves on national, regional and local levels in order to define their needs and positions and to make these known to the public sector institutions
- To be able to do so, institutions have to have key competences, they need effective structures and they have to follow their defined principles.

Part 2 (Theoretical Approach)
Building the Framework for the Bucovina Tourism Strategy

Whereas in **part 1** we have created a common understanding of tourism, interdependencies, success factors, and tools, in **part 2** we are now going to apply some of these tools. First we will look at the process, which will lead us to a further developed, updated tourism strategy. We describe the process and supply examples, which can be used as a guideline for the further development of the Bucovina Tourism Strategy in **part 3**.

3. Strategy Development Process

What happens in the frame of a strategy development process is shown in figure 27. Following the single steps which have to be undertaken will be elaborated.
Step 1 is to identify and describe the **current status** which serves as basis for the next steps.
Step 2 covers the definition or revision of the **vision and mission statements** as well as objectives and tasks for a set time period. In our example we have taken the five year period of the existing Bucovina tourism strategy which has set the goals shown below 2013 in figure 27.

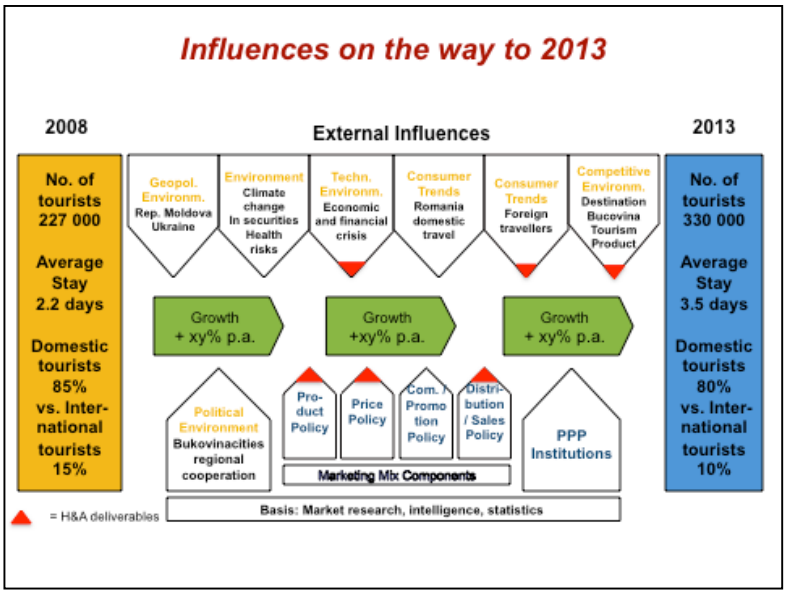

Figure 27. Tourism strategy development process

Step 3 focuses on **external influences** which have an impact on the tourism development in the next five years. Some can't be influenced others as e.g. the competitive position can.
Step 4 covers the **internal influences** deriving from the environment as well as from within the tourism sector in the destination. The question is which actions have to be undertaken to meet the set objectives for 2013 under consideration of the identified internal influences.

The outcome of steps 3 and 4 will be external and internal influences of relevance for the tourism development in the Bucovina. External and internal influences Bucovina tourism has to face are described in chapter 7 and 8. They have to be analysed to take the current status in Bucovina into account to identify **strengths** (what can be used for the further development), **weaknesses** (what needs to be improved), **opportunities** (what offers new possibilities) and **threats** (what needs to be considered and avoided to minimise risks). The result is a series of **SWOT analyses** that offer concrete points of departure for the deduction of necessary measures. SWOT analyses are done where the concrete status quo is analysed and the situation of relevant external and internal measures is considered.

How we get from SWOT analyses carried out in the frame of these two chapters via need assessments to identified projects will be shown in chapters 9 to 12.

3.1. *Status of Tourism in the Destination*

Step 1: The current status on the tourism sector of the destination has to be described and evaluated. This requires **market intelligence,** the evaluation of statistics, fact finding on the quality standards of the tourism offer and other activities which should create a clear picture of the current status which is the basis for the following steps. To give an example we have inserted figures of the Bucovina from 2008 in figure 27.

3.2. *Vision – Mission – Objectives 2013*

The **vision** statement should describe in more general terms what the destination wants to be in a given time. The vision of the **Bucovina Tourism** could be:

To be the internationally well known, leading destination for responsible tourism in Romania which keeps economic growth in balance with the need to preserve the natural and cultural heritage of the Bucovina.

The **mission** statement should express the way in which the vision should be achieved:

- To create by internal marketing activities an informed participation of all relevant stakeholders, an informed society, which is aware of the benefits of tourism and the responsibilities they have to ensure a sustainable tourism development,

Other issues to be covered by the mission statement could be:

- Education and further training of employees
- Services for SMEs, the backbone of the tourism industry
- Marketing strategy to position and promote the unique tourism offer on selected source markets in Romania and abroad in cooperation with NTO
- Interregional cooperation with neighbors counties.

Objectives express in more detail what should be achieved on which field when. We have to differentiate between more general qualitative and quantitative objectives. Following some qualitative objectives as example.

Objective 1: To ensure favourable framework conditions for the tourism business development

Tasks: Monitoring & Advocating

- Favourable framework conditions for all enterprises (SMEs) operating in the tourism sector calls for a **monitoring** on the **national level** of the government's activities which might have a negative impact on the tourism sector of the county. Only then the county can intervene with the various ministries in order to prevent adverse effects.
- On the **county level** monitoring the activities of the county and the vertical coordination with the local level can contribute to favourable framework conditions for the revenue generating SMEs.
- Supporting the establishment of competent **tourism institutions** on the public and on the private sector as well as PPP units on the local and county level enables the identification of SME needs and to develop respective services.
- Another issue are illegal construction works and the illegal operation of tourism services, which lead to a distortion in competition and bear in case of an accident the risk to damage the image of the tourism sector when it gets a case for the media.

Objective 2: To implement private sector and PPP tourism institutions which are able to contribute to effective destination marketing?

Tasks: Institution building

A strong national and international competitive position can only be achieved if the private enterprises engaged in the individual sectors of the tourism industry play an active, competent role in tourism institutions on a national as well as regional and municipality level. This should be encouraged by the county, which calls for close cooperation between the SMEs of different sectors.

Should the private sector fail to meet its responsibilities in structuring the Bucovina tourism policy, it loses its right to criticise this policy. On the other hand the tourism sector will fail to establish favourable frame work conditions for a sustainable tourism development and the sector will jointly fail to meet the vision and mission.

Objective 3: To ensure a high quality standard of the tourism offer

Tasks: Product quality assurance

The weakest link in the tourism supply chain of offers ultimately determines the image of the country. Therefore the tourism industry must engage in quality assurance right across all stakeholders. This entails the implementation of legal framework conditions, objective categorising in accordance with international standards and training institutions which can compete internationally in terms of content and technical equipment. The joint federation must engage in active quality assurance for Bucovina touristic offers.

The private sector is responsible for the quality of touristic offers which can be concretely booked. Furthermore, the Bucovina touristic product includes the infrastructure, which is influenced by regional development concepts, urban planning, the accessibility of tourist facilities etc. The county and the municipalities are responsible for this. All measures necessary to protect natural resources and the environment as well as to protect the local population and tourists such as protection from crime, health hazards, road safety are

measures taken to ensure the quality of a touristic product. This is also the responsibility of the state.

Last but not least, public services such as information offices, visa regimes, passport and customs control are also part of the touristic offer.

Objective 4: To improve quality of human resources in management and on the ground.

Tasks: Training and further training

Product quality calls for well-trained personnel capable of supplying the necessary services. The state has the responsibility of providing basic training and further training facilities in the tourism sector. In the lack of private sector institutions on county level the county itself has the responsibility to take care that the training institutions and their courses should be in line with the latest developments.

Tourism enterprises are responsible for providing training positions and carrying out their own in-house training.

Objective 5: To achieve an increase in revenues of the companies of the private sector

Tasks: Marketing the products and services of the county

The county must develop methods to present the tourism offers of the region on the national and international markets. This can be achieved through print or electronic media. International marketing requires a close cooperation with the NTO

To be effective on international source markets developments on the IT sector and possible applications of e.g. web 2.0 have to be monitored.

Objective 6: Improve business results for companies in the private sector, especially for SMEs

Tasks: Services for members

By pooling knowledge and calling in experts, an association can offer member services which will ultimately lead to higher profits. This can include improving operating efficiency, management, purchasing, controlling, etc.

However there are not such capable associations existing on the county level. This calls for an urgent solution. Possibilities are described in chapter 2.4.5 “Closing Gaps in the Tourism Institution Network”. See also figures 28 and 29 in this chapter.

3.3. *External Influences*

There is a wide range of impacts which cannot be directly influenced but which affect the development on tourism. Some examples can be found in "Influences on the way to 2013".

- The geo-political environment with the neighbouring states of Ukraine and Moldavia open up possibilities for cooperation, e.g. round-trips enabling an inter-regional discovery of Bucovina.

- Environmental issues, climate change, security issues and health risks have influenced the global tourism industry strongly. How such issues are managed can form the image of a destination.
- Technological and also economic developments of the past years have influenced the tourism industry strongly. An example is the use of the internet as a major part of the touristic offer and also as a chance to communicate the products of a tourism destination globally. For business travellers, internet connection in the hotel room is an important part of the service of the hotel.
  The effects of the financial crisis on the tourism sector are, apart from the fact that demand has changed / receded, not yet foreseeable. Destinations which have invested heavily in new resorts and infrastructure in the past 10 years (eg. Dubai or the Red Sea in Egypt) suffer from the downturn in tourist numbers and are in danger of collapsing.
- Demand for tourism offers of a destination are influenced by trends in source markets. In the case of Bucovina, that is over 80% Romanians that are travelling within the country. With a certain delay, trends from Western markets also filter through to the Romanian traveller. Thus, it is important to know how customer demands and behaviour change over time and how the tourism offer still meets those needs or whether it needs to be adapted.
- Each destination is in competition to other destinations. The competitive position is dependent on how well the destination can meet the demands of the targeted market segment in comparison to other destinations.

3.4. *Internal Influences*

How we can see in figure 27, there are also a number of internal influences on tourism. Internal means that the influences can be modeled and steered from inside the system.

- The influence for example of the political environment on the image of Romania internationally could impact on international demand. Seen from the national level, the regional political environment can be influenced.
- Concerning the political environment, it is for example interesting to see how national politics impacts on the image of Romania abroad and thus also on demand for tourism to Romania. Even easier to influence than the national political environment is the one at regional or county level. An example is the cooperation between the county council and the cities of the Bucovina and the cooperation of the destinations within the Bucovina.
- In 2.5 Issues for the Bucovina Tourism Strategy, we discuss in detail which options for influencing (as in the marketing policies) there are and that the development of marketing strategies requires market research and knowledge of trends, etc.
- Another success factor which is also dependent on internal design are the tourism institutions. Without tourism institutions on the private and public sector and good cooperation between them, sustainable marketing strategies are not feasible. Which tourism institutions are necessary for sustainable tourism policy and which responsibilities and duties they have is explained in 2.4 Success Factor Tourism Institutions (Management).

3.5. *Issues for the Bucovina Tourism Strategy*

- Revision of the mission, vision, objectives and tasks of the current tourism strategy in the sense of the benchmark given in the chapter 3.2 Vision – Mission – Objectives 2013.
- Evaluation of the existing studies on domestic and international source markets available at the Ministry o tourism.
- Identification of competitive destinations within Bucovina and on the international market and evaluation of status quo and trends on these competition markets.
- Further development of the identified types of tourism in the Bucovina in close cooperation with the local tourism stakeholders.
- Further development of the communication policy using the latest communication and sales channels in coordination at regional and at national level.
- Development of popular tourism offers creating favourable framework conditions for suppliers and incoming agents.
- Institution building (public/private/PPP) at the local, municipal, county and national level ensuring horizontal and vertical coordination and integration.

4. Identification & Definition of Tourism Strategy Components

In this section, topics (components) that need to be considered in the frame of a tourism strategy are presented. The following topics can be seen as a checklist for the development of a tourism strategy. In general, the following components are of importance:

1. destinations within the Bucovina
2. types of tourism
3. components of the tourism offer
4. fields of activities / measures
5. benchmark criteria.

The first three components are not included in this chapter but in chapter 8 “Internal Influences” in order to avoid repetitions. These points are only mentioned here as components.

4.1. *Destinations within the Bucovina*

Those destinations within the Bucovina which were identified in the tourism strategy are shown in Figure 28.

The Bucovina as a destination and the tourism destinations within the region are introduced in chapter 8.4. and in chapter 8.5..

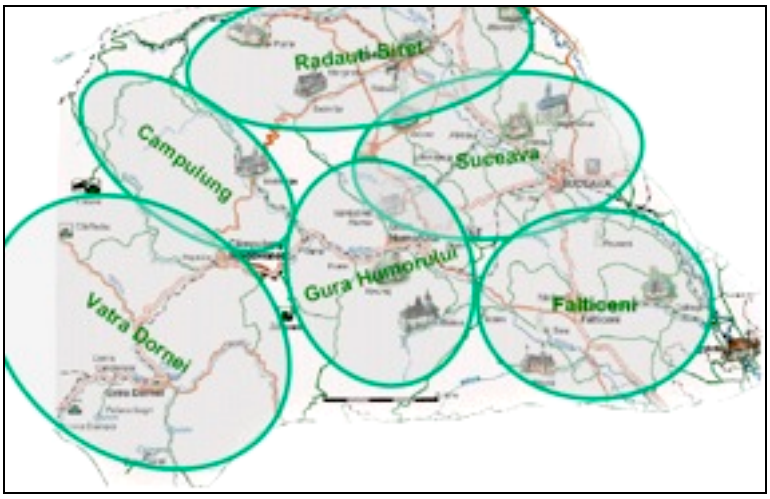

Figure 28. Destinations within the Bucovina

4.2. *Types of Tourism*

During the development of the existing tourism strategy, several types of tourism which fit to the tourism potential of the Bucovina best, were isolated and form a focus of the strategy. These types of tourism are introduced in more detail in chapter 8.5.

4.3. *Components of the Tourism Offer*

The touristic offer of a destination consists of many components. These are treated in more detail in chapter 8.6. These components form the touristic offer which is then used to enable the types of tourism that have been identified.

4.4. *Beneficiaries of Tourism Strategy*

The beneficiaries of a sustainable tourism development can be seen in Figure 3. They are the private sector, the public sector and, last but not least, the local population. It is important to remember that tourism development such as that defined in the tourism strategy does not only have one beneficiary, but those three mentioned. This is important when coordinating the different stakeholders to achieve sustainable tourism development. The definition of single projects should therefore also contain the expected impact on the beneficiaries

4.4.1. Private Sector

Not only the private sector, that is involved directly in the tourism sector, but also supporting sectors, service providers and others profit from sustainable tourism development. This means the tourism industry causes a ripple effect which is depicted in Figure 5, a fact that needs to be kept in mind when deciding on investments into the tourism sector.

4.4.2. Public Sector

Increasing tourism revenues means increased tax revenues for the public sector. Tourism also creates employment (thus decreasing the load of social costs of the state). Furthermore, tourism is an export and so can decrease a trade deficit. Examples show that the initial costs

of state investments in tourism are more than outweighed by the benefits through increased revenues and incomes. These relationships need to be considered when developing the tourism strategy which includes measures to achieve future results.

4.4.3. Local Population

Everything that is beneficial for tourists is also positive for the local population. Examples can be improved infrastructure, the accessibility of tourism destinations or attractions, a cleaner environment, improved entertainment offers, etc. but most importantly higher employment and so increased incomes for the households, in general an increased quality of life.
It is important to make these benefits clear to the local population. This leads to support of necessary measures from their side and a generally positive attitude towards visitors.

4.5. *Fields of Activities / Measures*

The following fields of activities have evolved from the development of the current tourism strategy for the Bucovina. They are based on programs for funding activities on the respective fields.

- Infrastructure for Tourism
- Rehabilitation & Preservation of historical sites
- Preservation of Authenticity
- Branding & Promotion

These fields of activities do not include the topics "**Human Resource Development"** and "**Public – Private – Cooperation(Partnership)"** which are basic requirements for sustainable tourism development. We acknowledge that the **source of funding** of tourism development projects is of great importance. Fact sheets of single projects therefore should contain the source of funding or the potential sources of funding when we talk about new product ideas or project recommendations. The allocation of single projects to sources of funding can be done as elaborated in attachment 15 "Project Management Tools"

We therefore recommend to structure tourism projects in an operational plan according to the fields of activities elaborated below. These fields should be elaborated and defined in more detail by the responsible stakeholders as part of the updating and completion of the more comprehensive tourism strategy.

4.5.1. General Conditions

General Conditions cover issues such as the tourism institutions on the public as well as on the private sector and their cooperation (PPP), the acknowledgement of tourism as a priority business sector, the existence of a tourism strategy, legal framework including conditions for investors, which are needed for improvements of infrastructure (roads, airports etc.).

4.5.2. Product Policy

Subjects of product policy are among others: G**eneral infrastructure** (transportation / roads / railways / airports / waste management / energy / etc.), **tourism infrastructure** (tourism assets such as nature and UNESCO cultural sights / accommodation / restaurants / transportation / signposting / infrastructure for the different types of tourism), the rehabilitation & preservation of historical sites, the preservation of authenticity, tourist information offices etc.

In our proposal the topics infrastructure, **rehabilitation of historical** sites and **preservation of authenticity** are part of "**product policy**". More details regarding the components of a tourism product are contained in Figure 15 and chapter 2.3.4 "Product Policy".

4.5.3. Destination Marketing

Destination Marketing covers all tools and measures to promote the destination Bucovina in Romania and abroad **e.g. branding** / **communication / promotion (**web portal / brochures / folders / fair participation / info tours for journalists and business partners / etc.), **distribution policy** (TO / incoming agents / web portal with reservation functionality / tourism information centre / fair participation).

To be effective m**arket intelligence / research** is needed which has to supply information about consumer trends on targeted source markets on destinations which are in competitions with the Bucovina

4.5.4. Internal Marketing

As sustainable tourism development requires the informed participation of all relevant stakeholders we have added the field of activity "**Internal Marketing**"

Internal Marketing is vital for tourism awareness and understanding creation in the public, in the public administration and within the tourism business sector.

Local Population awareness leads to positive attitudes, hospitality orientation as well as improved services of the staff on the tourism and the public sector.

4.5.5. Human Resource Development

Sustainable tourism development requires well trained employees. The GTZ submits a proposal for the founding of a tourism school in Suceava. The concept is enclosed as attachment 21 to this study (see chapter 9.5 and chapter 12. Recommended Projects).

4.5.6. Public – Private Cooperation

As we have seen in chapter 2.4, PPP is another success factor for achieving a sustainable tourism strategy besides marketing. Looking at the current status of tourism institutions in the Bucovina and in Romania in general, the urgent need for action on this field becomes obvious. We therefore recommend establishing a single field of action "public – private cooperation" and a project "tourism institution building" (see chapter 12).

4.6. *Benchmark Criteria*

The most important basis for a tourism strategy is a variety of benchmarks of different aspects of the market. The development of a tourism strategy includes the analysis of the status quo, identification of potentials, formulation of aims and, under consideration of internal and external influences, the development of measures whose implementation finally leads to a fulfillment of the aims included in the strategy.

In order for the most important aspects to be considered and for the basic required standards to be met, benchmark studies are indispensable. They depict what aspects need to be considered and which standards (taking competitive destinations or consumer trends into consideration) need to be met. This is relevant for the marketing mix policies (see chapter

2.3 Success Factor Marketing). Moreover, general conditions for sustainable tourism development also rely on benchmark studies.

There is also another reason why benchmark criteria are important for the development or amendment of tourism strategies. We must be aware that service providers in touristic regions which need to be developed further only have their own experiences and their own approach to systems and structures and so may **lack the complete overview**. To achieve a strong competitive position, it is important to know the behaviour of potential travellers and how it will change, how competitive destinations cope with that and which possibilities there are to expand the product on offer in the destination. Benchmark criteria should thus contribute to the design of competitive tourists offers which are also economically viable.

Part 3 (Practical Approach)
Further Development of the Bucovina Tourism Strategy

The existing tourism strategy of Suceava County follows the steps described in chapter 3. First the current status is presented followed by the status the county wants to reach in 2013. Under consideration of potential external and internal influences a number of measure were identified which are partially in the implementation phase, others are on the agenda for the upcoming years (see in part 4 chapter 10 and 11)

Following we restrict the description of the current status on the tourism sector of the Suceava county on the presentation which was held in May 2009 (see attachment 1). Regarding the structure of the strategy development process, we follow the steps shown in figure 27 “Tourism Strategy Development process”

5. Status 2008 and 2009 of Bucovina Tourism

5.1. *Structure and Volume of Tourism Business 2008/2009*

Total number of tourists:

227.000 visitors – 2007
187.412 visitors – 2004

Number of Romanian / foreign tourists:

85% Romanian and 15% foreign visitors – 2007
77% Romanian and 23% foreign visitors – 2004

Average duration of stay

2,3 days – 2007
2,5 days – 2004

5.2. *Key Issues of Tourism Strategy Development in Suceava County*

The issues below which were presented in May 2009 as part of the tourism strategy of Suceava show that there is a focus on legal framework conditions, human resource development, product development and communication and promotion of the Bucovina.

Issue	Topic / Field of Activity
• professional work force migration as a consequence of the low salary level from the tourism industry	HR
• lack of correlation between the educational curriculum of the tourism universities with the present development of tourism (poor practical training)	HR
• bad influence of 'black market tourism' towards the medium and long term development forecast for county Suceava	Legal framework conditions
• weak development of the touristic infrastructure	product
• poor development of touristic information and signal systems and their lack of correlation with the development level of the present tourism offer	product
• absence of a registered touristic trademark which could represent tourism in the area	Communication / promotion
• low promoting of the existing touristic potential	Communication / promotion
• permanent change of the fiscal legislative frame; large number of notifications and authorizations required for tourism activities development	Legal framework conditions
• non-existence of a suitable practical control system of the quality of touristic services	Legal framework conditions
• insufficient touristic programs and lack of recreational possibilities have an negative impact towards the average time duration of stay of the tourists in the area	Product / tourism offer/ tour- packages

Table 2. Issues and associated topic / field of activity

5.3. *Present Tourism Infrastructure*

Suceava County has the natural frame and the natural resources needed for a sustainable touristic development

- 7 painted monasteries and churches which belong to UNESCO heritage and another 87 which belong to the national heritage
- 92 creation centres and craftsman shops where one keeps the specific traditions
- archaeological sites
- 14 museums and 4 memorial houses
- touristic resorts of local and national interest
- 22 national reservations
- 415 accommodation establishments with over 12 000 accommodation units in 2-4 star hotels and 2-5 'daisy' boarding houses
- Identified 7 areas of development: Suceava, Rădăuţi, Gura Humorului, Fălticeni, Câmpulung, Vatra Dornei, Siret

One has made the multi-criterion analysis of the territory of Suceava County based on:

- the quality of the road infrastructure and utilities
- the state of the religious, historical and natural heritage
- the state of the existing accommodation structures
- the kind of the present tourism
- the kind of tourism with development potential

Results and further details are part of the existing tourism strategy for Suceava County.

6. Vision – Mission - Objectives 2013

6.1. *Where Does Suceava County Want to Be 2013*

- Increase of the **number of tourists** (from 227.000 tourists in 2008, to 330.000 tourists in 2013)
- Increase of the **average time of stay** (from 2,2 days in 2008 to 3,5 days in 2013)
- Improvement of the **price-quality ratio** for the tourism services, provided by County Suceava
- **Preservation of authenticity of** traditions (pottery, weaving, eye painting, wooden and stonework sculpture, icon painting on wood and glass) and products, which are a particularity of this area

6.2. *Vision / Mission Statements*

For further development of the existing tourism strategy, we recommend an adaptation of the vision and mission statements included in chapter 3.2 Vision – Mission – Objectives 2013.

6.3. *Objectives*

In chapter 3.2 Vision – Mission – Objectives 2013, a variety of aims and measures are introduced which form the framework of successful tourism development. We recommend using this example to define aims using those of the current tourism strategy and adapting and developing them.

7. External Influences of Relevance for Bucovina

7.1. *General Influences*

Here below, we present some selected trends which relate to Western societies and to Europe in particular. They are based on various analyses and assessments made by international tourism experts. This was valid before the economic and financial crisis of 2008-2009, it is uncertain to which extent these trends will continue in the future.

7.1.1. Economic development:

The economic and financial crisis of 2008-2009 has had large and lingering impacts on the tourism industry in Europe. In general, the economic downturn has led to long-haul travel

shifting to regional and domestic travel, which has an impact on international tourism in Romania.

Consequences for the tourism sector:
Both the public and private sector might need to rethink their target groups, may find new customers (tourists) and must try to adapt in order to hold repeat customers.

7.1.2. Technology:

Internet applications and their development have changed information and booking structures in tourism completely. The rising importance of tourism information and destination information via web portals as is seen by the phenomenon dubbed Web 2.0 means destinations and the involved organisations must adapt their behaviour and marketing. Web 2.0 means that tourists are now directly involved in classification and criticism procedures; personal accounts and remarks are no longer restricted to personal websites but really impact on the image and success of both tourism destinations and services, e.g. tripadvisor.com. Online reservation systems are handling ever greater portions of the travel market, although new destinations in mass markets tend to still be booked via traditional channels.
Another aspect of new developments in the IT sector is the use of electronic communication channels for internal and external marketing purposes.

Consequences for the tourism sector:
Depending on tourism strategies and target groups, Bucovina in cooperation with other tourism destinations and the NTO must become actively involved in improving online bookability and presentation (PPP).
Public opinion on user-based websites such as Trip advisor can and should be used, respected and can be influenced.

7.1.3. Legal Framework:

The private sector can only manoeuvre within the framework given by government. As specific examples for the tourism sector, the Romania Tourism Bill 2008 and the issue of double taxation impact on the industry and so on its success.

***Consequences for the tourism sector**:*

- here again, PPPs must ensure ongoing communication between lawmakers and the private sector institutions involved or affected.
- The PPP organisations must keep in mind that even bills passed which don't have direct impacts on the tourism sector may impact on it via indirect links.

7.2. Consumer Trends on Relevant Source Markets

7.2.1. Demographics

The number of persons in older age categories will rapidly increase. The elderly will be healthier and will have higher disposable incomes than in the past. Many of them will enjoy early retirement schemes.

As a result, the number of more experienced elderly travellers will increase more than the development of tourism demand in general.

Consequences for the tourism sector:

- Increasing demand for quality, convenience and security; for easy transportation; for more relaxing entertainment facilities (e.g. golf courses etc.); and for one-person products.
- More demand in shoulder months.
- In marketing, less emphasis should be put on age and more on comfort.

7.2.3. Health

Health-consciousness will increase still further. Though that will not influence the volume of demand, it will certainly influence the decision-making with regard to destinations, and behaviour during holidays.

Consequences for the tourism sector:

- Destinations that are perceived as less healthy will be more quickly avoided than in the past.
- Demand for sun-holidays will continue to decrease.
- Active or activity holidays will increase in popularity, and demand for facilities that correspond to this type of holiday will increase.
- The demand for wellness products will increase, including spas and fitness centres.

7.2.4. Awareness and Education

The average level of education is increasing. This will result in holidaymaking in which arts, culture and history play a more prominent role, including more educational and spiritual holidaymaking. Also of growing importance are educational programmes, which allow people to improve their knowledge while on holiday.

Tourists are also increasingly looking for an experience or an opportunity to carry out a particular activity – rather than selecting a specific destination. This means that national tourist offices and destination management organisations will need to be much more creative in their marketing and promotions.

Consequences for the tourism sector:

- Increasing demand for special products among others spiritual experiences/pilgrimage.
- The more prominent inclusion of elements of arts, culture and history in package tours and self-organised holidays.
- The need for better and more creative communication of information.
- Demand for new destinations will increase.

7.2.5. Sustainability

Environmental consciousness will continue to increase. For tourism, this will result in more demand for sustainable destinations, in which nature and population will play an increasingly prominent role. In order to mitigate the costs for sustainability, the price will increasingly be passed on to the tourists themselves.

Consequences for the tourism sector:

- The regional component in destinations will increase in importance.
- Destination management policies need to be improved by more coherent and consistent planning.

- The preference for destinations will be more strongly connected to the support given by the local population to welcoming increasing numbers of visitors.
- Regions which have suffered from dense construction (particularly where this is not in keeping with the natural landscape) will increasingly be rejected as attractive destinations.
- Eco-tourism should not be confused with sustainable tourism.

7.2.6. Safety and Security

Acts of terrorism, regional wars , pollution and other crises have unfortunately become facts of daily life, and influence the need to feel safe and secure. In tourism, this results in an increased need for safety and security, and in tourists avoiding destinations that are perceived as unsafe.

***Consequences for the tourism sector**:*

- The quality of water (in lakes and pools, but also of tap water) will gain more importance for the selection of the destination, along with increased demand for better protection of water quality.
- The more critical tourists will more quickly make claims if the product offered does not meet the expected standards.
- The costs for guaranteeing safety and security will increase rapidly.
- The industry should be better prepared to meet tourism demand more flexibly in periods of crisis

7.2.7. Other external Influences

Consumer trends on targeted source markets as described above are one major force, influencing the tourism offer. Below are shown some other external influences which impact the tourism industry, see figure 10.

- One social aspect influencing the tourism offer via the perception of a tourism experience is the **balance between tourists and the indigenous population**. To achieve this balance, internal marketing is needed to create awareness and explain relations between influencing factors and benefits.
- The perception of **security** in a destination can be different from the real situation. Security issues include beside war, terrorist attacks and the political stability as well as diseases and natural disasters.

7.3. *Evaluation of Trends in Western European Source Markets*

7.3.1. Tour Operator Interviews June-August 2009

To get an idea of the perception of the destination Romania as well as of the Bucovina as destination in Romania about 20 German tour operators were interviewed. The procedure was as follows:

- Development of a questionnaire (attachment 5)
- In cooperation with the Romanian tourist office in Berlin identification of about 50 tour operators as target group for interviews.
- Mailing of the questionnaire to all selected tour operators with the expression of our wish to discuss the questions listed by phone
- Interviews by telephone in the timeframe June to August 2009

It was a challenge to get the right person at the phone. Some interviews lead to a broad discussion about tourism in Romania. Following the summarised outcome of the tour operator interviews.

Ranking of the Destination Romania

- In no tour operator destination ranking Romania was positioned among the top 10 Though some T.O. focus on East and South-East European countries and cover types of tourism which fit to the potential in Romania.
- In the ranking of Dr. Tigges / Gebeco, the number two study tour operator in Germany Romania takes a position between 13 – 15.
- Because of the minor role the destination Romania plays for most TOs it was not possible to get valid answers on destinations within Romania or types of tourism.

Trends in Consumer Behaviour

- Because of the economic crisis, long haul travel is down
- Domestic travel in Germany is growing, outbound travel to European destinations is down but less than expected.
- Travelling in small groups or individually is growing
- Wellness, health, culture and hiking tourism are growing
- The length of travel is declining. Currently 5-7 days.
- Short term travel decision & booking is growing, flexibility expected
- For TO with an excellent reputation such as Studiosus or Dr. Tigges, price is not a dominant criteria for the travel decision if the price / value ratio fits.

Destination Promotion Romania

- The Romania tourist offices in Berlin and Munich are rated 6 in the scale from 1 (poor) to 10 (excellent)
- The Romania presence at ITB (B2B), Stuttgart and Munich (B2C) are known and appreciated.
- There are no specific requirements regarding the promotion of the destination Romania. One big TO has complaint that counterparts do not know how TO function and that promotion support should be more than supplying photos.

Experiences with Romania

The following **ratings** are based on a scale from 1 (poor) to 10 (excellent)

- Image of the destination Romania 5
- Quality of services 6
- Quality of attractions 7
- Quality of Hotels 4
- Quality of transportation 4
- Quality German speaking Guides 5
- General price / value ratio 6

Because of the lack of Bucovina awareness a valid rating of the same positions in the Bucovina as well as a rating of the awareness of the types of tourism typical for the Bucovina was not possible. Most tour operators judged the Bucovina similarly to Romania simply

because they had no other information. The fact that this happens must be taken into account by stakeholders in the Bucovina.

Competitive Destinations

Destination / Type of Tourism	Competitive Destinations (Countries)
Mountain and Active Tourism	Bulgaria and above all Alpine countries, which are closer to western source markets
Balneary, Health Tourism	Hungary, Czech Republic, Germany, Austria, Switzerland
Rural Tourism	All Central and South-East European countries
Cultural Tourism	All Central and South-East European countries
Business Tourism	All Central and South-East European countries

Table 3. Competitive destinations in Europe per type of tourism

In table 3, countries are listed which offer types of tourism which can be considered competitors for the identified types of tourism in the Bucovina. For a detailed benchmark however competitor destinations within these countries would need to be identified. Only at cluster level is a competitor benchmarking useful.

For the elaboration of product development measures, it makes sense to look at neighbouring or other central European clusters and to analyse and even to get to know these by means of delegation trips. Surely, interesting best practice examples could be discovered but also surely some lessons on what not to do in order not to waste good opportunities for maintaining a good competitive position.

7.3.2. Tour Operator Expectations

Tour operators need professional and realistic offers and reliable support on the ground in order to sell the destination. Tour operators in the source markets are the most important sales channel, in particular for international tourists. It is thus important to meet the expectations these tour operators have of their partners within the destination, in this case within the Bucovina.

A good strategy within the frame of distribution / sales policy is the participation at tourism trade fairs in the respective source markets. Tourism trade fairs that cater specifically for business partners (B2B) like the ITB in Berlin or the RDA Workshop in Cologne are particularly relevant. To increase interest and trust from potential business partners, the incoming agents and also the tourism organisations responsible for the marketing of the destination must present themselves in a professional manner. This includes:

- A meaningful company profile of the agency including history, company website, association memberships, information on insurance and liability, details on employees and their background, how long they have been in the business, and, if possible, references.

- Elaborated round-trips with all relevant details including prices of the offer, in printed form.
- Tourism information covering the highlights of the roundtrip in printed form.
- Electronic information material with offered roundtrips and comprehensive tourism information.

Further details on trade fair participation and destination presentation are included in a briefing attached to this paper (attachment 6).

7.3.3. Evaluation Source Market Studies

In attachment 7, some general data on the perception of Romania as a tourism destination in some source markets and the expectations and behaviour of foreign tourists in Romania is presented..
Some important information was delivered by studies ordered by the Romanian tourism ministry and coordinated by Romanian tourism offices from within source markets, studies done by internationally recognised consulting companies such as IPK, KPMG, Horvath Consulting and others, between the years 2006 and 2009.

Attachment 7 is summarizing assumptions about: Germany, Austria, France, Spain, Italy, Netherlands, the UK and Hungary. Such input is very important in order to be aware of the expectations of foreign tourists coming to Romania and to Bucovina, and to adjust the tourism offer if necessary. The tourism products should be personalised and targeted to the final consumers. The example below is a graph depicting expectation of tourists from the UK. In blue are the expectations of a holiday, and in red is the perception of Romania for each point, respectively.

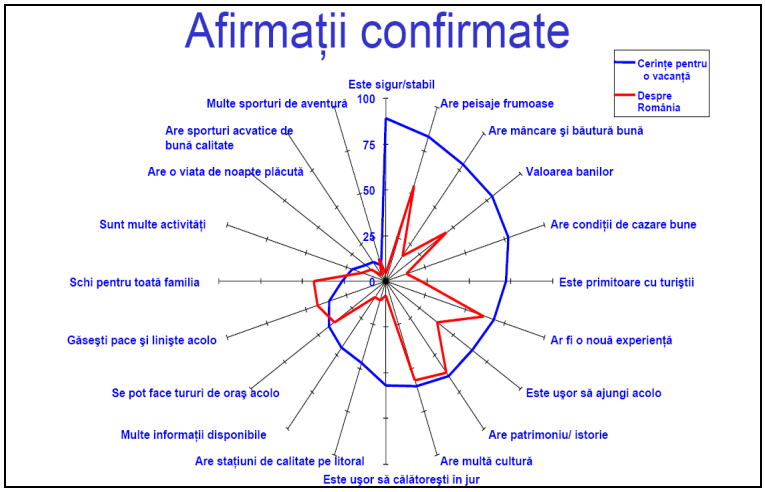

Figure 29. Graph on UK tourist expectations and perceptions in Romania

The tourism offer of Romania and of Bucovina almost reaches the level of expectation for the components “culture”, “historic patrimony”, “peace and quiet”, “ski destination”, and “adventure in nature”. For other issues, major improvements are needed.

In order to adapt the tourism offer properly and to find the right selling and promotion channels, it is important to be aware about the motivation and profile of tourists coming from source markets.

The attached study offers for each country information concerning general facts about the source market and which destinations are visited besides the Bucovina, profile, reasons for travel, modes of transport, type of overnight accommodation at destination, travel purchases, average length of stay and travel, frequency, favourite seasons, average daily expenditure and holiday activities. That information should be further used by the stakeholders in planning the promotion tools and in decision making process in tourism promotion and distribution. The information can also be used in order to train the accommodation establishments on how they can adjust and adapt the offer according to the country of origin of the foreign tourists and their specific needs and expectations.

7.4. *Outcome Customer Interviews in Bucovina*

In order to get a better picture of the profile of tourists visiting the Bucovina, the GTZ in cooperation with Suceava county council developed a questionnaire that was used in interviews with 109 visitors in the summer of 2009 **(attachment 9).**

The structure of the applied interviews were: 73,4% to Romanians, 1,8% tourists from Republic of Moldavia and 5,4% from USA, UK, Austria, Germany and Italy. The identified source regions from Romania are Bucharest (11%), Cluj Napoca (5,5%), Iaşi (7,3%), Constanţa (4,6%), Timişoara (5,5%), Suceava (3,7%), Bacău (3,7%), Braşov, Piatra Neamţ şi Satu Mare with 2,8% each.

The **length of the stay** in the Bucovina is between 1 and 5 days for 46% and between 6 and 10 days for 40,6% of tourists. The difference between the medium lengths of the stays of tourists in the Bucovina and the response to this question is due the fact that most of the responders were long-stayers. The rate of response from group tourists and transit tourists was very low.

The study shows that the percentage of repeat visitors is high: 69,7% of total. The motivations of tourists to visit Bucovina was: Leisure / Relaxation (56,9%), Experience nature (36,7%), Culture and the painted monasteries (19,3%), Discovering new traditions and customs (17,4%), Active tourism, Discovering cultural values, Local Gastronomy, each of those with a percentage of 13,8%. Then on the place 6 is following VRF – Visiting relatives and friends with 12,8%, Rural life 11,9%, Business tourism 11% and Health and health treatments with 6,4%.

The **main information source** that influenced the holiday-making decision were delivered by previous visits (38,5%), recommendations from friends and relatives (25,7%), internet (16,5%), Bucovina tourism guides (14,7%).

The **main attractions** of Bucovina are, according to the research, Nature (67%), Culture and traditions (38,5%) and on the third place is pilgrimage and the monasteries (36,7%).

The **competitive destinations** mentioned by the tourists are Maramures, Transilvania, Neamt Region and Danube Delta. Some other results of the study refer to the small destinations visited in Bucovina (Falticeni, Suceava, Radauti-Siret, Vatra Dornei, Humor, Campulung a.o.), booking instruments, accommodation booked, values associated with Bucovina, the overall satisfaction and recommendations for improvement.

7.5. *Competitors of Bucovina Destinations*

7.5.1. Destinations within the Bucovina

Above all in the source market Romania, there is competition between the destinations within the Bucovina which can become a driving force for the further development of the tourism offer of the single destinations. Internal competition can also be used to get the commitment and contribution of relevant stakeholders.

(1) Evaluation situation according to 2008/09 strategy
(2) **<1>** Evaluation of development potential

Destinations within Bucovina / Type of Tourism	Suceava	Falticeni	Radauti Siret	Gura Humorului	Campulung Moldovenesc	Vatra Dornei
Balneary, Health Tourism				**(2) <2>**	**<3>**	**(1) <1>**
Rural Tourism	**<3>**			**(3) <1>**	**(2) <2>**	**(1)**
Cultural Tourism		**(3)**		**<2>**	**(1) <1>**	**(2) <3>**
Religious Tourism	**(2) <2>**	**(1)**		**(3)**	**<3>**	**<1>**
Educational Tourism		**(3) <2>**		**(2) <1>**	**(1) <3>**	**(2)**
Mountain-Active Tourism			**(3)**	**<1>**	**(2) <3>**	**(1) <2>**

Table 4. Ranking top 3 destinations by type of tourism

Table 4 shows one ranking of the destinations within the Bucovina by type of tourism based on the situation in 2008/09 and one ranking based on the development potential. The figures were taken out of the strategy presentation from May 2008 (attachment 1). During our workshop in October 2009 in Campulung Moldovenesc it became obvious that the ranking in table 4 has to be revised.

7.5.2. Destinations within Romania

Here below is the matrix with the different types of tourism and those destinations within Romania which are competitors on these fields to the Bucovina as well as to the destinations in the Bucovina. For benchmark purposes it is recommended to identify these destinations within Romania and to add them in the top row of the matrix. This lies in the responsibility of the Tourism Group of the County to actualize this chart.

Destinations within Romania / Type of Tourism	Maramures	Sibiu	Litoral	Delta Dunarii	Brasov	Neamt
Balneary, Health Tourism		x	x			x
Rural Tourism	x	x		x	x	X
Cultural Tourism	x	x	x	x	x	X
Business Tourism		x	x		x	X
Nature, Active and Mountain Tourism	x	x		x	x	X

Table 5. Type of tourism / competitive destinations in Romania

On the basis of tourism resources, access infrastructure and outline market analysis a number of areas have been identified as potential tourism development areas. The areas identified are broad geographic zones that have a broad mix of attractions capable of sustaining tourism activity through the year. The following potential tourism development areas, or clusters, have been identified:

- **Bucharest City Break** – Culture, MICE, and Leisure
- **Transylvania Tourism Circuit** – Culture, Nature, Eco tourism, Health and Wellness, Skiing and Adventure Tourism
- **Black Sea Coast** – Beach, Leisure, Culture, Health and Wellbeing, Black Sea cruises
- **Bucovina** – Culture, Eco tourism, Nature, Wellness, Skiing and Adventure Tourism
- **Maramures** – Culture, Nature, Eco Tourism, Skiing and Adventure Tourism
- **Danube Delta** – Nature, Eco Tourism, River Cruises, and Leisure.

7.5.3. Destinations Outside of Romania

In Table 3 above, destinations within Europe which have been identified by the H&A tour operator interviews are listed. This list is merely a naming of destinations which needs to be elaborated upon to allow a more detailed comparison on tourism cluster level. For benchmark purposes and as best practice examples it would be good to identify tourism clusters in some of the countries which fit to single types of tourism identified in the Bucovina.

7.6. *Summary Outcome External Influences*

In the chapters above and in the attachments, important influences which will impact on future developments on the tourism sector in the Bucovina were listed. A whole range of strengths / weaknesses/ opportunities / threats that can be deducted from these influences have been used to develop new projects (see below in part 4).

The listed external influences cannot be completed, they do however highlight which issues can have an influence on tourism in the Bucovina and what needs to be monitored closely, considering the dynamic development of these issues in order to seize opportunities for the further development of the tourism strategy of the Bucovina.

8. Internal Influences

8.1. *Political Environment*

The **legal framework** in a destination can create poor or favourable framework conditions for the tourism development. Taxation schemes e.g. in Romania which lead to much higher charges of tourism activities than in competitive destinations are one example. For the development of destinations the investment climate depending e.g. on laws to secure investments, to handle profits are of great importance.

For the development of the tourism sector continuity in tourism institutions, their commitment in the sense of the tourism sector and contributions to the development are an important issue. Unfortunately there is at least at national level a lack of continuity.

Another obstacle for a sustainable tourism development is given if the county president and the mayor of the capital city belong to different parties.

8.2. *Application Marketing Tools*

The use of the marketing tools as introduced in Figure 14 should aim at achieving sustainable tourism development. This means having the best possible knowledge about consumer behaviour and trends on the important source markets and also knowledge on the development of the most important competitor destinations. As over 80% of the visitors to the Bucovina come from Romania, it is particularly important to know changes of Romanian consumer behaviour and to develop the tourism offer accordingly. As one aim is to increase international visitors, it is also important to have good knowledge of trends on the chosen international source markets.

In addition, a focused application of marketing tools also requires a profound knowledge of the competitor destinations both concerning regions and concerning types of tourism.

Which marketing instruments are to be used in which way can be seen in chapter 2.3 Success Factor Marketing. It is important to be aware that it is not sufficient to use external marketing measures to achieve increasing tourist numbers and revenues but also to use **internal marketing** for stakeholders and the local population to ensure the prerequisites for sustainable tourism development. **Internal marketing measures** are of importance in order to achieve a positive, pro-tourism attitude among the local population, the commitment and contribution of stakeholders and the customer-service orientation of the staff in the tourism sector.

8.3. *Public – Private Sector Cooperation (PPP)*

The development of effective marketing measures and their use can only be successful if appropriate institutions exist on the public and private sectors which are able to develop and

apply these instruments. This requires respective competences and capacities of the responsible institutions. Furthermore, willingness on both sides to cooperate in PPP institutions and to take over respective responsibilities for the marketing of the destination are indispensible. Which institutions take the responsibility for which marketing measure can be seen in Figure 16.

8.3.1. Status of Tourism Institutions in the Bucovina

There is a lack of tourism institutions on a regional, district and local level, a lack of competence of persons in charge, a lack of continuity in politics, a lack of understanding the tourism sector and its needs, a lack of public private partnership and a lack of cooperation within the tourism sector.

Cooperation is particularly relevant to tourism, because it calls on the resources of many different companies to meet a client's needs. Working together is essential, because no one service provider can single-handedly welcome clients and integrate the development of a tourism destination.

8.3.2. Tourism Institution Network

The position of the **Bucovina tourism association** in the national tourism institution network can be seen in Figure 26. As most national private tourism sector associations have no regional/county and local structure they have a problem to render needed services to its members (SMEs) operating on the local level. This problem can be solved by a cooperation with APTs such as the Bucovina tourism association

In a **bottom up approach** APTs identify via their network on county level (see figure 31), the service needs and requirements of SMEs, pool these needs and requirements and submits them to FAPT, the umbrella association of APTs. FAPT pools, evaluates and structures the needs and requirements received by all APTs and submits them to the respective national association, representing tourism sectors or types of tourism (see Table 1) which have the competence to render required services but no local network to service their members.

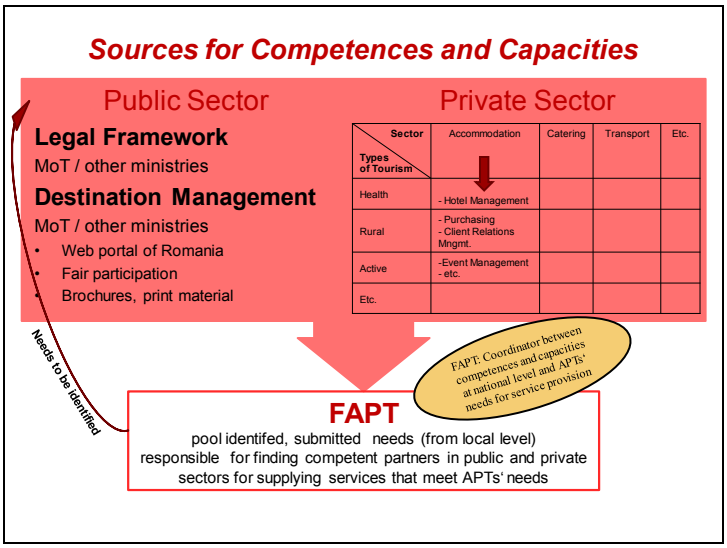

Figure 30. FAPT as the coordinator of APT member services on the national level

The **top down solutions** are developed by public and private sector tourism institutions on the national level (see figure 30), and then via FAPT and coordinated and organised by the respective APT such as the Bucovina Tourism Association rendered to SMEs on the local level. The APTs and their local members do the field work to identify service needs and to organise the platform for solutions – thus supplying the missing regional and local network for national association's services. This constellation (see Figure 30, 31) enables the local tourism institutions as well as the APTs to offer via their national partners services which meet identified SME needs. The outcome is a typical win – win situation which contributes to improved product quality and thus better competitiveness of Bucovina destinations.

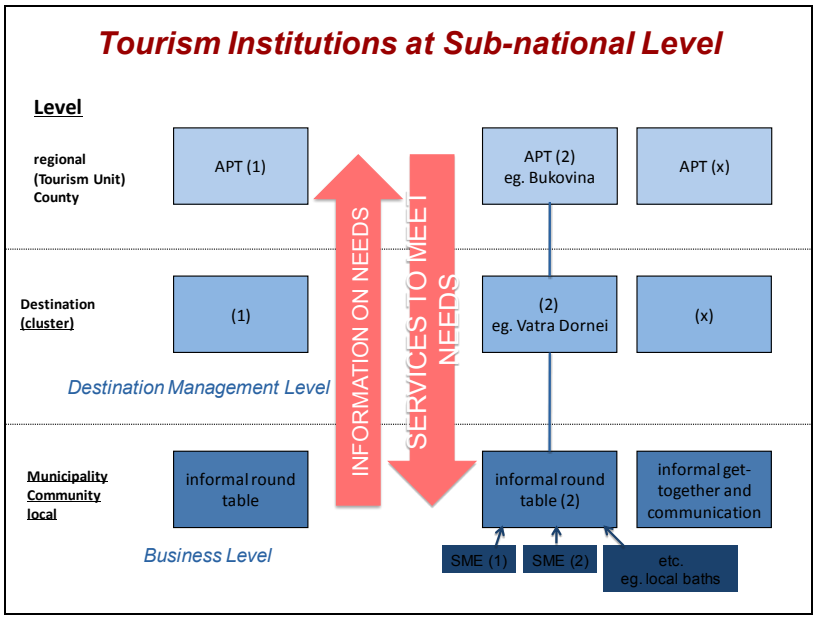

Figure 31. Bottom up and top down approach

8.4. *Destinations within the Bucovina*

The following destinations within the Bucovina were analysed in depth for the development of the tourism strategy presented in May 2009. Each destination and type of tourism can undergo a SWOT analysis on the basis of available data. It is recommended that certain destinations should undergo this procedure and to use these examples to develop a need assessment for the identification of necessary measures. An example for how to use the SWOT Analysis scheme is given in 8.7.1 "General Conditions".

In order to get an overview of the Bucovina destinations as basis for benchmarking and further discussions, it is recommended to define further criteria for structuring the tourism potential as well as the current situation. Chapters 8.4.1. to 8.4.6. could then be completed.

8.4.1. Suceava

- Tourism assets/attractions/events
- Types of tourism
- Visitor profile

8.4.2. Falticeni

- Tourism assets/attractions/events
- Types of tourism
- Visitor profile

8.4.3. Radauti Siret

- Tourism assets/attractions/events
- Types of tourism
- Visitor profile

8.4.4. Gura Humorului

- Tourism assets/attractions/events
- Types of tourism
- Visitor profile

8.4.5. Campulung Moldovenesc

- Tourism assets/attractions/events
- Types of tourism
- Visitor profile

8.4.6. Vatra Dornei

- Tourism assets/attractions/events
- Types of tourism
- Visitor profile

8.5. Types of Tourism

Compared to table 4, there are in table 6 some changes regarding the types of tourism. Active and mountain tourism as well as cultural, religious and educational tourism were combined, **business tourism** was added. Table 6 could be used for an updating of the ranking in table 6.

<1> Evaluation of development potential, according to the seminar on 4th October 2009

Destinations within Bucovina / Type of Tourism	Suceava	Falticeni	Radauti Siret	Gura Humorului	Campulung Moldovenesc	Vatra Dornei
Balneary, Health Tourism				**<2>**	**<3>**	**<1>**
Rural Tourism			**<2>**		**<3>**	**<1>**
Cultural Tourism		**<3>**	**<2>**	**<1>**	**<3>**	
Business Tourism	**<1>**		**<3>**	**<2>**		
Mountain-Active Tourism				**<3>**	**<2>**	**<1>**

Table 6. Ranking top destinations by type of tourism

On the basis of the information contained in the 2008/09 tourism strategy, the following criteria and more should be developed per type of tourism. This is an important step so that all stakeholders get a **common understanding of the types of tourism** when developing their own measures to improve their offers. In addition, this procedure enables better horizontal coordination of activities and measures among the destinations.

Taking into consideration the results of the types of tourism in the available tourism strategy and results from recent studies, **SWOT analyses** have been carried out for each type of tourism. They are combined in attachment 4. These SWOTs form the basis for the **need assessment** and so for the deduction of necessary measures to use the strengths, overcome weaknesses, seize opportunities and avert threats. See need assessment per type of tourism in attachments 10 to 11.

8.5.1. Cultural Tourism

- Definition
- Types
- Components of tourism offer
- Destinations in the Bucovina

8.5.2. Rural Tourism

- Definition
- Types
- Components of tourism offer
- Destinations in the Bucovina

8.5.3. Mountain / Active Tourism

- Definition
- Types
- Components of tourism offer
- Destinations in the Bucovina

8.5.4. Balneary and Health Tourism

- Definition
- Types
- Components of tourism offer
- Destinations in the Bucovina

8.5.5. Business Tourism

- Definition
- Types
- Components of tourism offer
- Destinations in the Bucovina

8.5.6. Other Types of Tourism

- Definition
- Types
- Components of tourism offer
- Destinations in the Bucovina

8.6. *Components of the Tourism Offer*

The different types of tourism cannot be described without the following components of the tourism offer. This means the quality of the touristic offer depends on the quality of each component. It is important to note that the weakest link in the product chain determines the quality of the whole product and offer. For example, bad service as a consequence of insufficient professional training can destroy the otherwise positive image of a destination. It is thus in the interest of all stakeholders and suppliers to ensure that the overall level of quality is high. This includes the areas which lie in the responsibility of the public sector. See also Figure 15.

The following two tables make clear that bad performance in one component of the tourism offer can damage the performance of a destination within the Bucovina or of a type of tourism in the Bucovina. Thus, all stakeholders within a destination and/or all stakeholders involved in one type of tourism must ensure that all elements of the tourism offer maintain a high level of quality. Quality assurance is thus a common duty, both of the public as well as of the private sector. This also makes clear how important it is to have institutions in both sectors which can work together efficiently to ensure a high level of quality.

Destination / Components Tour. offer	Suceava	Falticeni	Radauti Siret	Gura Humorului	Campulung Moldovenesc	Vatra Dornei
Accommodation						
Food and Beverage Outlets / Restaurants						
Transportation						
Events						
Services						
Staff Quality						
Local Population						
Tourism Information						
Signposting						
Infrastructure						

Table 7. Components of tourism offer per destination in the Bucovina

Type of Tourism / Component Tour. offer	Balneary, Health Tourism	Rural Tourism	Cultural Tourism	Business Tourism	Active Tourism
Accommodation					
Food and Beverage Outlets / Restaurants					
Transportation					
Events					

Services					
Staff Quality					
Local Population					
Tourism Information					
Signposting					
Infrastructure					

Table 8. Components of tourism offer per type of tourism

On the basis of the analyses made for the existing tourism strategy, the listed components of the tourism offer can be broken down and defined in more detail. It is recommended to do this in order to achieve a **common definition and structure** for further development of the tourism offer. Furthermore, it is possible to do a SWOT analysis per destination within the Bucovina and per component of the tourism offer to discover needs for action for improvements of the tourism offer and to achieve the envisaged goals for 2013.

- Accommodation
- Food and Beverage Outlets / Restaurants
- Transportation
- Events
- Services
- Staff Quality
- Local Population
- Tourism Information
- Signposting
- Infrastructure

8.7. *Summary Outcome SWOT Analyses*

Detailed SWOT analyses can be found in attachments 4. Here below is an example of how to use the SWOT analysis scheme. The table shows the standard formula for SWOT analyses. The idea is to identify the strengths, weaknesses, opportunities and threats from the benchmark criteria in the left column. For the strengthening of the competitive position of the tourism destinations, identified **strengths** (above all in contrast to their competitor destinations) can be used, **weaknesses** can be overcome, **opportunities** can be seized and **threats** can be averted.

All SWOT analyses carried out during work on this study on the types of tourism as well as on the following fields of activities are combined in attachment 4.

8.7.1. General Conditions

Here is an example for a SWOT analysis outcome and deductions from it, for a general framework for the tourism organisations for the Bucovina.

General Framework of Tourism Organisation

Strengths	Weaknesses
• Tourism is seen as a priority at county level • Existence of a tourism strategy and of strategic measures that are	• Lack of Targets and Prioritization in implementation of measures in tourism at all levels: private and public • Lack of tourism awareness and understanding of stakeholder on the public as well as on the private sector (importance of tourism strategy / benefits of tourism / USPs of Bucovina and

already in implementation • A good cooperation with the Chamber of Commerce and Industry in Suceava and with other important stakeholders in tourism Political willingness to use tourism potential.	their preservation / expectations of visitors / state of the art solutions etc.) Resume: Bucovina is still far away from an informed participation of stakeholders, which are requirements of a sustainable tourism development • SMEs the backbone of the tourism sector as revenue generator is not aware of state of the solutions for the handling of their business. They are not able to identify their service needs • Lack of competence and capacity on local and county level to compile and to offer services which help SMEs to apply state of the art solutions • Priorities should be established in the tourism development at county level, in order to reach a clear vision of tourism for Bucovina Region • Lack of entrepreneurial and management skills for the pension and hotel owners. • The local authorities are not aware about their role as supporters of tourism sector (public areas, parks, public lighting). The tourism can not be developed without a proper public space and good public services (lightning, signposting, bus stops, local transportation, rest places for tourists and visitor centers or TICs). • Contradictions concerning the definition and exploitation of protected regions; too soft sanctions for violating such laws; the fees for visiting parks are too low • There are over-regulated segments and under or un-regulated segments, which generate an unbalanced aspect of the legislation. • The industry did not address to county government with a unified voice in order to achieve better collaboration • Need to professionalize the activity of tourism departments in planning and marketing field • Lack of competent tourism experienced people on local administration in the 7 administrative regions of Bucovina; need of tourism training for the representatives of 7 tourism units within Bucovina, in order to participate to the Tourism Consultative Body at County Level Business Plans and Architecture Plans are not aware by the specificity of tourism field. For this reason a lot of problem in management and operation of tourism structures are appearing.

Table 9. Strengths and weaknesses of general framework of tourism organisation

Other SWOT tables with the results of SWOT analyses carried out in 2009 or with details taken from the previous tourism strategy paper can be found in the attachment 4

8.7.2. Product Development

These SWOT tables with the results of SWOT analyses carried out in 2009 or with details from the previous tourism strategy can also be found in attachment 4:

- Tourist attractions. Natural Attractions
- Tourist Attractions: Cultural Heritage
- Accommodation
- Food and Beverage Outlets / Restaurants
- Transportation and Accessibility
- Events

- Services
- Staff Quality and Local Population
- Tourism Information
- Signposting

8.7.3. Destination Marketing

The SWOT table listing the results of the SWOT analysis on destination marketing are contained in attachment 4 of this paper.

8.7.4. Internal Marketing

The SWOT table listing the results of the SWOT analysis on internal marketing are contained in attachment **4** of this paper.

8.7.5. Human Resource Development

The quality of Human Resources in tourism is a key factor in tourism development. According to the Memorandum of Understanding, a close attention was given to this component. We will present hereby the strengths and weaknesses for the Human Resources Management Development in Bucovina and Romania, and in chapter 9.5. we will describe a corrective proposal, to create in **Bucovina a Competence Centre** for Tourism (See also attachment 21).

The current situation in education and further education can be described as follows:

- High density and variety of tourism faculties of in Romania: at least 27 listed tourism faculties
- Good graduates use internships and work & travel programmes abroad to leave Romania and go working abroad.
- Only (or mainly) theoretically based first professional education,
- Lack of practical experience orientation in first professional education (Lyzeum, college, professional schools/SAM and university)-
- Teachers, professors and trainers do not have (enough) practical and up-to-date experience and knowledge
- Content and curricula don't fit requirements of the tourism labour market
- Mediated tourism knowledge is not up-to-date
- A lot of training facilities at professional schools were developed and modernised in the last 5 years, but even today there are not enough places / is not enough space in learning stations and of practical training facilities
- Lack of intercultural behaviour and green-thinking (environment protection)
- Lack of multi-language tourist guides and knowledge about Romania and the region.

Problems of jobholders and small businesses in tourism

- Lack of service orientation of employees and managers
- Lack of business and management skills of the middle and top management
- Family businesses do not have (enough) tourism knowledge, customer orientation, management and marketing skills
- Lack of active selling and internet marketing skills
- House-keeping and room-services should be improved
- Accommodation design, furnishing and interior equipment are not up-to-date and not convenient.

- Problem of part-time labor / seasonality / high rate of labor migration to Western Europe

Current situation of the employees and managers in Romania

Graduates:

from Secondary Schools (age 14/15)

1. get professional training at a 2-years-professional school
2. after 1 additional year at a High School they can enter the Abitur (A-level) classes for further 2 years
3. or 14/15-aged pupils go to High Schools (Lizeum):
   a) Economic High Schools
   b) Tourism Classes
   c) Other kinds of Lizeums

- poor or few real working experience
- theoretical knowledge

„Fresh" University and Business College Graduates:

- Often speak fluent foreign languages
- international experience
- theoretical marketing knowledge
- high mobility to leave their (public) employers, DMOs or Romania
- poor or few working experience

People working in the field of tourism, but without a formal degree in tourism can visit:

1. adult education courses at a Lyzeum/High School (e.g. a 6-month-course for cooking, 720 h)
2. seminars offered by private seminar providers/academies
3. seminars financed by EU(EFS), but offered by providers without tourism experience
4. seminars offered by tourism branch associations (like the Romanian Hotel and Restaurant Association, ANAT or others)

- Speak no, 1 or more foreign language(s)
- No / with international experience
- (No) mobility

People with a formal diploma or degree in tourism, but with working experience there:

- need of special tourism knowledge and service abilities

People without a formal diploma or degree in tourism and without working experience in the fields of tourism / should be enabled to work in tourism (Re-Trainees)

Figure 32. Educational and professional training system in Romania

8.7.6. Public Private Cooperation (PPP)

Figure 33 shows that beside the tour team of the county and the Bucovina tourism Association as PPP institution on county level, there are no other responsible tourism institutions on the private sector as well as on local level on all sectors existing. There is an urgent need to establish respective tourism institutions. Whereas the two existing institutions are a strength, their organisational structure, the available capacities, the possibilities to render services to SMEs etc. are weaknesses which require action (see chapter 9)

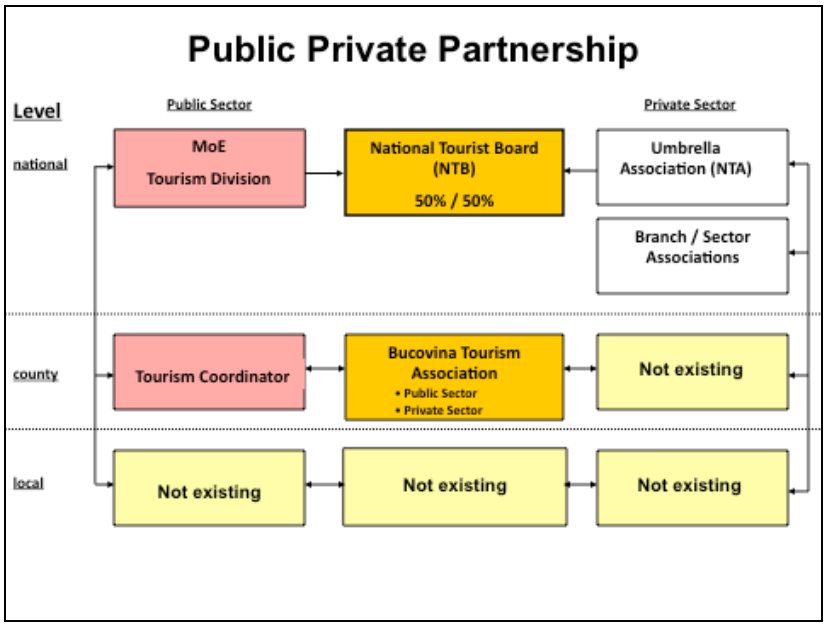

Figure 33. Current status tourism institutions in the Bucovina

8.8. Strategic Positioning of the Destination Bucovina

Under consideration of the described external and internal influences on the development of the tourism sector, two strategic decisions must be made: Cluster strategies which give value to the client and market range strategies.

8.8.1. Strategies to Give Value to Clients

To give value to the clients of a destination, two alternative strategies can be chosen. Each poses different requirements and has different consequences. The first can be reversed while the second is almost impossible to reverse:

1. **Differentiation strategy:** The main value proposition lies in being exclusive, original and quality-oriented. This strategy is based on offering some of the most important value components (services, experiences and sensations) in a unique way.

2. **Cost leadership strategy:** Here, the main value proposition is enhanced by a high-value-for-less-effort formula. This strategy consists in producing lower-cost

services, or services with fewer discomforts or insecurities, than one's competitors.

8.8.2. Market Range Strategies

For the evaluation of the range of markets to serve, another two strategic options should be considered. These can be combined with any one of the former two. Once again, these have very different requirements and consequences.

1. **Global strategy:** This means addressing all the tourism source markets from all geographical regions of the world.

2. **Focused strategy:** This consists in focusing on only one, or a reduced number of, segments. The perceived value of each chosen segment is enhanced. The strategy works simultaneously with either a differentiation or a leadership in costs strategy.

8.8.3. Recommendation

There is no doubt that the prerequisites given in the Bucovina and under consideration of the external influences, especially concerning customer behaviour and trends, only the **"differentiation strategy"** makes sense.

Concerning the market range strategy, only the **focused strategy** makes sense for the Bucovina. Romania and the Bucovina firstly don't have the resources to pursue a global strategy and secondly the capacities available do not allow for a global strategy.

9. Need for Action / Identified Measures

In Chapter 4 "Identification and Definition of Tourism Strategy Components" we were introduced to the destinations within the Bucovina as well as to the types of tourism (see 4.1 and 4.2.). In addition, we are now aware of the tourism product components (see 4.3 and 8.6), the fields of activities / measures (see 4.5 and 8.7.) and of our recommendations in chapter 4.5. for the structuring of the fields of activities. In the following chapters, the identified measures will be positioned in a matrix. This gives us a transparent and structured overview of all identified measures – per identified field of activity, per type of tourism and per destination within the Bucovina.

In the following, we use the recommended structuring for the fields of activities independent of the source of funding. However, the source of funding will be identified in the project code which we will identify for each project, as discussed in chapter 4.5..

In part three "Further Development of the Bucovina Tourism Offer" with chapters 5 to 8, the current status of the tourism sector in the Bucovina is partially described. We recommend a completion of the descriptions and definitions of single chapters on the basis of the existing tourism strategy. Under consideration of the external and internal influences, SWOT analyses on the single components of the tourism strategy were carried out. Most of the SWOTs are attached. These SWOT analyses should also be completed. On this basis, **need assessments** can be carried out. For this purpose and in order to identify necessary measures and projects, we have developed the following table.

Benchmark criteria (product, price, promotion, distribution)	Facts (strengths, weaknesses, opportunities and threats)	Actions needed	Projects			Field of activity
			On going	Planned	Recomm.	
TYPE OF TOURISM						
I. General Conditions						
I.1. General Framework of Organisation of Tourism in Bucovina						
I.2. Tourism institutions and organisations						
I.3. Public private partnership PPP						
I.4. Tourism Education Institution						
I.I5. Tourism Strategy Paper						
II. Marketing						
II.1. xx						

Table 10. Need assessment scheme template

How to use the Need Assessment Scheme

In the attached need assessments, the outcome of the SWOT analyses were integrated into the second column of the need assessment scheme. In the third column ("actions needed"), actions to address the SWOTs were defined. In the column "projects", research was done to ascertain whether these SWOTs were already being addressed in current, planned or recommended projects. Finally, in the right hand column, "Field of activity" defines which kind of activity it requires.

On the basis of the available **SWOT analyses** (see attachments) and other, future SWOT analyses that are possible due to the dynamic further development of the tourism strategy, the described **need assessments** can be done for the **following fields of activities**. To clarify the methodological approach, this is done in an exemplary manner for the following cases.

Benchmark criteria	Facts (strengths, weaknesses, opportunities and threats)	Actions needed	Field of activity	Project Status (Code)
I. General Conditions				
General Framework of Organisation of Tourism in Bucovina	Lack of awareness of tourism stakeholders and local population… - of the impact of tourism on the Bucovina - of the interdependencies of the tourism sector - of the responsibilities of single stakeholders Lack of awareness of a sustainable tourism development: - informed society, - competent and effective tourism institutions at local, community / municipality / tourism destination within the Bucovina / county and national level - of destination management	Need to create an **informed society** and to create their **willingness to cooperate** in further developing the destination	Development of **internal marketing** measures with objectives / target groups / tools, etc.	Open (4)
PPP	Lack of **tourism institutions**	Need to define, to develop and to establish missing tourism institutions on the public and private sectors	**Institution building** to create tourism institutions on the public and private sectors and respective PPP units	Open (4)
Human Resource Development	Missing competence and capacity for destination management	Need to close competence and capacity gaps of staff in the public and private tourism sectors Need to develop and offer further education for existing staff and for future staff	**Human Resource Development** for current and future staff Further development of destination management tools to be applied by tourism institutions	Open (4)

Table 11. Need assessment scheme with example inputs (general conditions)

9.1. *General Infrastructure*

Needs on this subject can be derived from the SWOT analyses in attachment 4

9.2. *Product Development*

Needs on this subject can be derived from the SWOT analyses in attachment 4

9.3. *Destination Marketing*

Needs on this subject can be derived from the SWOT analyses in attachment 4

9.4. *Internal Marketing*

An example for a need assessment and the development of a fact sheet can be seen as example in attachements. Needs on this subject can be derived from the SWOT analyses in attachment 4.

9.5. *Human Resource Development*

Needs on this subject can be derived from the SWOT analyses in attachment 4. As there is a great need, attachment 21 is a proposal for a "tourism school" in Suceava by the GTZ.

9.6. *Public Private Cooperation*

We have already seen in 4.5.6. and 8.7.6. with figure 33, that there is an urgent need for completion of the tourism institutional framework. We therefore propose a project "Strengthening Tourism Institutions in the Bucovina" (see chapter 12.2.).

Here bellow we identified some actions developed from the SWOT Analysis, presented as **Need for Action / Identified Measures. All these can represent first operational plan for the development of tourism in Bucovina.**

The activities presented here bellow are developed according to the general issues of programmatic documents[1] and to the needs identified in the workshops organized by GTZ and County Council. The content of this chapter refers to the general framework of the development of tourism in Bucovina, Suceava County, are structured according to chapter 8 (Part I) and in individual Needs of Assessment (Part II), structured on different type of tourisms and presented in a table as Table 10 (Attachments Needs Of Analysis).

The both proposals for measures are developed starting by the results of workgroups from the seminars on 25th of June and 4th of October 2009. We will present here the identified corrective measures for the tourism development in a table format. The table is describing the objective of the proposed action, the action/measure, motivation, timeframe, partners, funding and project status (implemented, open, to be done), with the mention that project

[1] WTO, Masterplan of Romania 2007

status should be entered by the tourism department of County Council. The general order of the information is:

9.1. General Conditions
9.1.1. General Framework of Tourism Organization
9.1.2. Tourism Institutions
9.1.3. Public-Private Partnership
9.1.4. Infrastructure
9.2. Product Development
9.3. Destination Marketing
9.4. Internal Marketing
9.5. Human Resource Management and proposal for a Tourism Competence Centre in Suceava.

For each action we proposed some urgency scale: high priority, medium priority, low priority. These recommendations should be adjusted according to the current actions and the current budget for tourism.

9.1.1. General Framework of Tourism Organization (Field of activity)

Nr. Crt.	Facts and Objective (strengths, weaknesses, opportunities and threats)	Actions needed	Time frame and milestiones	Responsible	Partners	Funding	Project Status
HIGH PRIORITY – General Framework							
1.	Involvement of the industry in the management of the tourism in the region should ensure a better collaboration and swifter progress industry wide. Establish a semi-autonomous office of tourism at county level reporting to a Private-Public Tourism Board chaired by the President/Chef of Tourism Department of County Council. Such office should be in charged with the management and marketing of destination Bucovina.	Introduce a formal and informal cooperation with the PPP bodies in Bucovina. To establish a private/public sector board "Consiliul Consultativ de Turism Bucovina" with development, marketing and HRD responsibilities and authority to receive external funding.	6 months Memorandum and invitation to be launched	County Council	Bucovina Tourism Association, tourism associations within the Bucovina	Own resources	To be done
2.	Enable private sector tourism interest to	Facilitate a gathering of industry	6 months By the middle	County Council	Tourism Industry Associations	Own resources	To be done

	collaborate better with the public sector. Allow the industry to address government with a unified voice and achieve better collaboration	associations to form a Consultative Body for tourism in Bucovina.	of 2010				
HIGH PRIORITY – Environment and Natural Landscape							
3.	To remove unsightly and unhealthy waste. The many open waste dumps and illegal waste disposal does great damage to the image of Romania, on all transport ways	Give priority to the enforcement of disposal of waste by public and private sectors in an environmentally sound manner	1 year More rigid enforcement by end 2010.	County Council Environment Direction (Garda de Mediu)	County and local authorities	National and local budgets	To be done
4.	The landscape of the Bucovina Tourism Gates (Airport, Railway, suburbia a.o. areas) should be improved	To establish an operational plan for the improvement of the tourism landscape to the entry in Bucovina, in the railways, coming by car or from the airport. It a high need for sanitation and improvement the general aspect of the city Suceava and others entry points in the County.	The plan should be done and approved until the middle of 2010 The implementation should be on going, seeing as a priority	County Council Suceava Mayoralty	Local mayors Public administration	POR	Planned (acc. To Mr. Lungu public declaration)
MEDIUM PRIORITY – Environment and Natural Landscape							
5.	To remove the cause of much non bio-degradable bottles and bags dumping. By charging for bags and placing deposits on bottles consumers are encouraged to dispose of them properly	Introduce a local legislation to reduce the circulation of plastic bags and bottles	1 year More rigid enforcement by end 2010 The opening of waste management plants in Moara, Humor in time	County Council Environment Direction (Garda de Mediu)	County and local authorities		On going
6.	To cease the practice of discharging waste water direct into waterways. Apart from a localised health hazard impacting on tourists clean waterways are needed as a tourism asset	Expedite implementation of waste water treatment facilities	1 year Treatment plants opening according to planning schedules	County Council Environment Direction (Garda de Mediu)	County and local authorities		
7.	To remove	Introduce a	1 year	County and	Ministry of	Own	To be done

	unsightly and unhealthy waste in order to improve the image of Bucovina's Landscape	national 'Keep Bucovina Clean' campaign	Campaign launched by the end of 2010	local authorities	Environment and Sustainable Development	resources	
8.	Establish a 'Bucovina de Aur/Bucovina Verde' competition. Such competitions are proven to decrease litter, increase civic pride and provide an attractive image to the destination	▪ Commission a methodology for the establishment of a competition to encourage tidy, colorful and flower-full towns and villages ▪ Launch the 'Bucovina Verde' competition Secure sponsorship for its continued operation	3 years	County Council	Local authorities Donors initially. Corporate sponsors thereafter		To be done
9.	To remove the health and safety risk posed by stray dogs in the cities. Stray dogs pose a threat to health and also of adverse destination publicity if tourists are attacked	Collaborate with animal welfare groups to impound stray animals and find responsible owners	3 years	Suceava Municipality and local authorities	Animal welfare NGOs, Local authorities and NGOs		

9.1.2. Tourism Institutions

Nr. Crt.	Facts and Objective (strengths, weaknesses, opportunities and threats)	Actions needed	Time frame and milestones	Responsible	Partners	Funding	Project Status
HIGH PRIORITY ACTIONS							
1.	Improvement of tourism representatives at local communities' level. Evaluation of the operations of the tourism local offices from Suceava County with a view to reorganize the network.	TOURISM OFFICE IN COUNTY COUNCIL. Cost benefit analysis study to examine the efficiency of tourism back office activity: use of romanian staff vs. marketing/management representation contracts; reporting systems between offices and HQ by county council; effectiveness of marketing and promotional programs and definition of performance benchmarks/criteria. All this	6-9 months Study complete by end of 2010	County	Private sector associations	Own resources	To be done

	To determine the optimal form of representation in the territory and to establish a system of performance measurement	criteria should be included in a yearly plan of activity.					
2.	The local public administrative bodies are not aware of the importance of their support for the development of tourism flows to the area.	Produce guidelines for the establishment and operation of local communities selected as having as priority the tourism; Guidelines for mayors for Bucovina Village Landscape, Public Space, Transportation.	End of 2010	County Council Tourism Consultants	Local public authorities	FEADR, CBC POS DRU	To be done
MEDIUM PRIORITY							
3.	To satisfy the information needs of the increasing number of independent tourists and assist with local reservations particularly for small establishments.	Establish a regional network of TICs providing common service levels. Produce guidelines for the establishment and operation of a TIC; work with the "owners" of TICs to establish their centres; install equipment; train staff; publicize network	5 years Guidelines by spring 2010. Upgrade proposals by end 2010. Training by end 2010.	County Council	Local Authorities and other TIC sponsors GTZ for training of TIC Officers University	POR 5, FEADR	Open

9.1.3. Public-Private Partnership

Nr. Crt.	Facts and Objective (strengths, weaknesses, opportunities and threats)	Actions needed	Time frame and milestones	Responsible	Partners	Funding	Project Status
HIGH PRIORITY ACTIONS							
1.	County regional development officers should encourage and facilitate the formation of rural area destination and product marketing consortia and associations, under the umbrella of Bucovina Destination. Collaborative efforts among small suppliers have been seen to be the most effective means of promoting destinations.	To form local tourism associations to facilitate promotional activity and improve standards.	6 months 4 more local □ssociate-ions formed and operation-al by end 2010	County Council Bucovina Association can support some local associations by capacity building	Local authorities and tourism suppliers		To be done
2.	The activity of Local Tourism Associations is compulsory and sometime not according to tourism professionals standards	To organize a training for the executive staff of all tourism associations within Bucovina	End of 2010, Beginning of 2011	All associations	SES GTZ Tourism Counsultants	FEADR POS DRU	To be done
3.	The existing PPP						

	Structures have, most of them, just a formal informal of the public side. The local authorities should realize that such PPP Structures are not a threat, but a single way to develop in a sustainable way tourism						

9.1.4. Infrastructure

Nr. Crt.	Facts and Objective (strengths, weaknesses, opportunities and threats)	Actions needed	Time frame and milestones	Responsible	Partners	Funding	Project Status
HIGH PRIORITY ACTIONS							
1.	To provide a regional strategic planning context for tourism development	To provide a regional strategic planning context for tourism development, according with traditional architecture from Bucovina, according to the sustainable development of tourism	Ongoing, until End of 2010	Cadastre Office, OAR (Romanian Architects Organization	County Council	Own resources	To be done
MEDIUM PRIORITY							
2.	To provide a regional planning context and strategic guidelines to tourism development. To provide a regional planning context and strategic guidelines to tourism development	Prepare integrated tourism development plans for each of the 7 identified tourism regions	2 years	County Coucil	Local communities	FEADR	By end of 2011
3.	To provide local, municipal and commune, Tourism Plans To provide a planning context and strategic guidelines to tourism development	Prepare integrated tourism development plans that comply with environmental legislation for each tourism destination identified in the strategy					
4.		To provide guidelines and sample documents for the preparation of Tourism zone development Standards and Guidelines, especially in the	2 years By end 2010	Local governments	County Council	n/a	

		rural area.					
5.	Make viable business plans, environmental impact studies, and integrated town plans mandatory for new winter sports developments. To provide detailed design and development standards for tourism developments	Prepare a comprehensive set of architectural guidelines and planning standards to be met in the development of tourist facilities and areas.	1 year By mid 2010	Ministry of Development, Public Works and Housing GTZ Sibiu ((Project Rural Heritage Architecture)	Ministry of Tourism, Ministry of Culture and Cults, Ministry of Environment and Sustainable Development	Own resources	

9.2. Product Development

9.2.1. Accommodation

Nr. Crt.	Facts and Objective (strengths, weaknesses, opportunities and threats)	Actions needed	Time frame and milestones	Responsible	Partners	Funding	Project Status
HIGH PRIORITY ACTIONS							
1.	**Accommodation.** Improve the monitoring of accommodation standards Support a new concept "casa traditionala" proposed by Asociatia de Dezvoltare Locala si de Promovare a Turismului Sucevita Annual reviews necessary to ensure standards are maintained. Fees contribute towards the cost of the additional assessors required	Make accommodation licensing and classification an annual requirement and subject to payment of fees	6 months	Tourism Department in the County Council and local tourism associations	Tourism Ministry Tourism Association		
2.	The industry is sufficiently developed to help tourists make informed choices of where to eat	Discontinue classification of restaurants and catering establishments	6 months	County Council	Tourism Associations		
3.	Remove unnecessary controls. Current classifications are confusing and the grading imprecise	Rationalize the categories into which accommodation is classified and introduce more effected means of assessing quality. (Technical assistance)	1 year	Tourism Ministry	Tourism Associations		
4.	Make the accommodation classification system more user friendly and the grading more meaningful Incorporate environmental protection into the accommodation licensing	Prepare a set of environmental guidelines for the local licensing of tourist accommodation,	1 year	County Coucil Tourism Ministry	Ecoturism Association		

	system. Ensure the tourism sector embraces the principles of environmental protection	including standards for solid waste and sewage disposal and energy conservation					

9.2.2 Leisure and weekend breaks for locals

Nr. Crt.	Facts and Objective (strengths, weaknesses, opportunities and threats)	Actions needed	Time frame and milestones	Responsible	Partners	Funding	Project Status
HIGH PRIORITY ACTIONS – Product Development (the actions can be included to marketing measures too).							
1.	**Leisure and weekend breaks for locals are a segment not enough promoted.** A high circulation within the region is assured by the local citizens that are spending the weekend at the country side, or they are driving for picnic in areas close to their city. Pensions need to improve extra season occupancy, which is perceived by them as a weakness. A convenient extra season offer can encourage the locals to left their home and to spent the weekends in the pensions in the Bucovina. The locals should be encouraged to participate to the local events in the area. For this, a fix list of events should be well kneed and promoted	**Leisure and week end breaks for the locals.** Generate off-peak (particularly weekend and extra season) tourism in Bucovina. Internal circulation from Suceava to other destination in the county, or from Radauti to Sucevita a.o. For this some actions are needed: ▪ Open a TIC in central Suceava, with POR financing, with satellites in tourism communities ▪ Develop a central reservations facility (box office) for all main destinations ▪ Promotion of local and regional events ▪ Provide a dedicated non-stop bus shuttle service between the Suceava and then to other destinations within Bucovina (or provide a hop on hop off bus tour of Bucovina)	3 years TIC with box office open by 2010 Bucovina Bus Shuttle operational by end of 2010. Marketing campaign by end of 2010.	County Council Tourism Associations	Transporters, hotels, pensions, event makers	POS DRU POR 5.3 Local authority and private sector Local authority and private sector. POS DRU POR 5.3	

		▪ Develop an marketing campaign for Bucovina internally					

9.2.3 Natural attractions. Active, mountain and nature tourism.

Nr. Crt.	Facts and Objective (strengths, weaknesses, opportunities and threats)	Actions needed	Time frame and milestones	Responsible	Partners	Funding	Project Status
HIGH PRIORITY MEASURES							
1.	**Hiking.** To publicize the considerable opportunities for hiking in Bucovina and make all requisite information available. To develop best practice examples as for example NAP Project	▪ Prepare development plan for trail mapping and data collection together with the Salvamont Offices from Dorna, Campulung and Suceava. ▪ Rationalize the network of hiking trails in protected areas in cooperation with Forestry Direction and Calimani Park Administration ▪ First stage in hiking development program	6 months Plan by end 2010.	County Council and Adminis-trators of nature reserves and national parks	SALVAMONT and local authorities, Forestry Directions (if needed) Ecotourism Association from Romania	POR 5.2, POR 5.3 FEADR and own resources	
2.	**Winter Sports.** Improve the viability of current facilities / resorts in Vatra Dornei, Campulung and Gura Humorului. Ensure future expansion responds to market needs, especially for the recent built ski resorts and slopes in Gura Humorulu, Mălini, Carlibaba **New facility development should be contingent on proven demand, not**	▪ Commission research into future market demand for winter sports to assist in planning of facility and resort expansion	12 months Study by spring 2011	County Council	Local authorities	POR 5.3	

	on fashion demand.						
3.	**Winter Sports for Active Tourism** Improve utilization of winter sports facilities in traditional low season Create an opportunity for Winter sports resorts to attract new clients and improve facility utilization	▪ Stagger February school holidays over two or more weeks ▪ Extend the concept Nature Walking in extra season for the winter resorts	2 years Staggered holidays by 2012	City Hall from Gura Humorului, Vatra Dornei, Campulung, a.o.	Associations of mountain guides		
MEDIUM PRIORITY							
4.	**National parks, caves and other natural resources** To provide additional and unusual tourist attractions in areas on touristic circuits additional visit opportunities on tourist circuits and in national parks in order to extend visitor length of stay and add variety to the visitor experiences on offer The Natural Parks and reservation should offer original tours, nature interpretation programs. Caliman National Park has already offers dome in this direction ▪ The infrastructure to some nature reserves should be fundamental improved	▪ Administrators of caves suited to general public visits to develop visitor access, thematic lighting, interpretation and visitor reception facilities ▪ To improve the infrastructure to nature reserves till 2013 (Codrii Seculari Slatioara, Frumoasa a.o). with signposting and promotion	5 years One development plan submitted for funding by end 2010 The infrastructure should be improved till end of 2013	County Coucil Calimani National Park administrators	Speleological Association Bucovina, Romanian Federation of Speleology	POR 5.2	
5.	**Cycling** To establish the Bucovina Cycling Route	Prepare funding application to: ▪ Complete mapping, and	1 year	National Cycle Tourism Association and NTO		POR 5.2.	

	as a long distance cycling trail, either simple or combined with other means of transportation. To resolve the special endowments for cycle tourism in Bucovina (access in train, transportation of bicycles, specific information). Supplementary support for Dorna Adventure. By establishing Bucovina's cycling route it is intended to identify the area as a cycling in a nature destination and encourage further trail development. On EU Market is an increase of the number of cyclo-tourists.	route description for the Bucovina trail including publicity material ▪ Complete sign-posting of the route ▪ Research promotional channels to cycling enthusiasts ▪ Undertake a promotional campaign for the Bucovina Cycling Route	Funding proposal submitted by mid 2010. Implemented by end 2011				
6.	**Camping and Caravan** To provide quality infrastructure in Bucovina for camping and caravan, visitor reception facilities in different regions "docking points". Ensure smooth handling of visitors and offer a quality welcome to Bucovina. It was a high interest for Bucovina at Caravan Fair in Stuttgart. A necessary	Private stakeholders and local authorities should prepare and implement parking and infrastructure according with ADAC Guidelines and assure access facility plans for caravanning and camping tourists	2 years Funding applications by mid 2010 Implement for 2011 season	Local Communities	County Council Local Associations	POR 5.2	Mountain Rescue Office local authori-ties

	tool will be ADAC Guidebook for camping.						
7.	**Hiking** To publicize the considerable opportunities for hiking in Bucovina and make all requisite information available. By presenting full cartographic and other data on hiking opportunities in advance the full range of opportunities can be promoted to hikers internationally. It is a lack of cartographic materials and updated maps at all stakeholders within the area. Modern promotion tools should be made (GPS Tracks, Audio Guides with description of trails a.o.), full orientation in both Romania and English language	Rationalize network of hiking trails to minimize negative environmental impacts Engage cartographic technical assistance in order to assure cartographic plans 1:5000 for all Bucovina Implement mapping and data collection for existing trails and make certification of new trails contingent on provision of such data. Research hiking market. Develop and implement hiking marketing plan. Revise certification criteria for trails to include all information, GPS data etc. required for main database.	5 years Existing trails mapped and research complete by end 2010. Marketing campaign for summer 2011	County and Administrators of nature reserves and national parks		POR 5.3. and other resources	
8.	**Salt Mine Cacica** To enhance the visitor appeal and facilities at salt mine Cacica in order to increase the range of attractions and local business. Salt mines are both beneficial treatment centre and attractive 'alternative' visitor attractions with the potential to increase visitor stays.	Develop and Implement Cacica mine development project, including visitor reception facilities, mine visit experience and marketing Develop feasibility studies and business plans and secure donor and/or commercial investors	5 years. The mine Cacica should be refurnished by end 2013.	SALROM	County Councils and Cacica City Hall	CBC FEADR	To be done

	It exists already some feasibility studies for Cacica Salt Mine as tourism sight, but unfortunately are not updated to the international similar sights.						
9.	**Tourism Circuits** Develop tourism circuits to illustrate the enormity of visit opportunities in Bucovina Tourism. To extend length of stay and expenditure by demonstrating the wealth of attractions in a region	Assist tourism operators to define tourism circuits incorporating access gateways, hub towns, excursions, activities and accommodation in Bucovina. Consider theme signposting additionally.	1 year	County Council	Local authorities and tourist associations	First circuit complete and in print and on Internet by end 2010	

9.2.4. Cultural tourism: Museums, Heritage and UNESCO Attractions

Nr. Crt.	Facts and Objective (strengths, weaknesses, opportunities and threats)	Actions needed	Time frame and milestones	Responsible	Partners	Funding	Project Status
HIGH PRIORITY							
1	**Cultural tourism: Museums, Heritage and UNESCO Attractions.** To develop museum and heritage attractions to provide best practice visitor interpretation and welcome facilities	▪ Introduce innovative presentation techniques ▪ Provide catering facilities where applicable Expand retail operations Heritage attraction and museum visitors are seeking a fuller experience than a purely visit. A warmer welcome, better interpretation and facilities increases visitor appeal and generates more visitors and income.	3 years Museums renovated by end 2013. Signalistig resolved. People trained by end 2011.	Museum, gallery and heritage attraction directors	Ministry of Culture and Religious Affairs, County Councils, Tourism Ministry	POR 5.2. and other Funds by Culture Ministry	
MEDIUM PRIORITY							
2.	**Museums and Heritage Attractions.** To bring the presentation of museum, archaeological site and heritage building display and interpretation up to modern standards.	Increase in museum visits and visitor spend Improve the interpretation of exhibits for visitors,	1 year 1 day courses Initial training	County Coucil Museum of Bucovina	Ministry of Culture and Cults, local and county authorities Ministry of	POR 5.2. and other donors POS DRU	

	Museums and heritage attractions are now required to entertain as well as educate. Better interpretation encourage visitors to linger and offers opportunities to increase visitor spend\ To develop museum and heritage attractions to provide best practice visitor interpretation and welcome facilities. Museum staff should act as hosts rather than supervisers in order to improve visitor satisfaction. In Bucovina are already some best practices in Suceava Ethnographic Museum, Village Museum and in Gura Humorului. The attitude must be expanded to all structures, and if possible to the monasteries too.	including additional language materials. Identify opportunities and locations for improved catering and retail operations in or alongside museums and heritage attractions. Secure donor support for the above Provide customer care training to staff	complete by end 2010		Culture and Cults, County		

9.2.5. Rural Tourism

Nr. Crt.	Facts and Objective (strengths, weaknesses, opportunities and threats)	Actions needed	Time frame and milestones	Responsible	Partners	Funding	Project Status
High Priority							
1.	**Rural Tourism.** To increase tourism to rural areas by agritourists, ecotourists and special interest groups Special interest product suppliers need extra support identifying and reaching their market segments	To encourage the associations for rural activities, targeting special interest groups.	Immediate and ongoing Doubling of partner operators' business by end 2009	County Council	Rural tourism and special interest operators	County Council budget and in-kind by private sector	
2.	**Conservation of Bucovina Village Landscape**[2] Awareness campaigns are necessary for a full understanding of the complexity of tourism. It should start with the mayors of tourism rural areas, because some of them have only a limitate understanding of the public service that the mayorality should deliver to the tourism industry	**Awareness rising through**: -Campaign for local population, brochures for awareness raining (identic to actual campaing in Sibiu County) -Events for awareness rising -Teaching materials/courses for school children -Support (technical and	2010-2011	County Council	Mayors from all tourism areas Local tourism associations from rural area	FEDEAR	

[2] Similar actions were proposed by Architect Stefan Mildner for rural conservation in Transylvania

		information) for rehabilitation of windows, facades and roofs -Training of crafsmen					
3.	**Improvement of public space for locals and tourists**	To realize a **guidebook for the mayors** with the relevance of public space for tourism development -Support for planning public space projects, according to village landscape and not kitsch and inappropriate to local architecture -Support for planning public space projects -Subsidies for the improvement of public space -Car parking in villages should be improved -Signage and local orientation in foreign languages should be improved, due the fact that the local population is not speaking foreign languages	Guidebook to be done until the end of 2010	County Coucil	Mayor Institutions from Bucovina Local Tourism Associations, ANTREC At national level Direction for Agriculture	POR 5.2 FEADR	
4.	**Improvement of accommodation offer and services in rural area**	Entrepreneurship and tourism orientation trainings for pension owners Bed&Breakfast for rural tourism to be produced. Training measures Consultancy and training through a Tourism Consultative Body to be implemented, with tourism professionals (is a must) 2 SES Experts in Rural tourism to be invited	B&B Guidebook to be done by the middle of 2011 Part time consultancy body to be created until the end of 2010, with solid tourism knowledge	County Council	Local Tourism Associations ANTREC local branch	FEADR Fonds	
5.	**Improvement of gastronomical offer in rural tourism**	To organize as one year event the events	On going	County Council	Local tourism associations	FEADR	

		started in 2009 (Milk Festival, Bio Products Fairs a.o) To promote the use of organic food and bio product To identify typical Bucovina receipts and to make a Bucovina-Cook Book as best practice documentation for the tourism structures in rural area			Bucovina Tourism Association		
6.	**Other touristic offers**	To extend the best practices of ANTREC and to some local communities in gastronomic contests and festivals (Ciocanesti, Vama, Sucevita a.o) To promote better the "village products" To develop additional programs for cultural entertainment To develop the signace of local hiking trails	On going	County Coucil as coordinator, through tourism department	Local tourism associations	FEADR	

9.2.6. International Tourism/Visiting Relative and Friends

Nr. Crt.	Facts and Objective (strengths, weaknesses, opportunities and threats)	Actions needed	Time frame and milestones	Responsible	Partners	Funding	Project Status
HIGH PRIORITY							
1.	**International Tourism/Visiting Relative and Friends.** The ex-pats can contribute to the promotion of Bucovina and they can encourage foreign tourists to visit Bucovina. For this, separate communication and promotion channels should be established. Low cost carriers have a proven track record of generating traffic and can generate much awareness for their destinations.	Attract low cost carriers to Suceava (Italy, Spain, UK if possible, a.o.) Develop dedicated promotion channels to the main destination where Romanian expats are working Continue negotiations with	12 months 2 carriers operating by end 2011	Suceava County Council	Suceava airport	Own resources	

		low cost carriers to establish a number of high profile routes attractive for independent travelers					

9.2.6. Health Tourism and Spa

Nr. Crt.	Facts and Objective (strengths, weaknesses, opportunities and threats)	Actions needed	Time frame and milestones	Responsible	Partners	Funding	Project Status
			HIGH PRIORITY				
1.	**Health Tourism and Spa** Curative and Spa Resort Targeted marketing of spa resort Vatra Dornei in foreign markets, that can fit to the actual level of services. Based on researched product needs and market segments launch the Vatra Dornei spa resort product range in appropriate markets. It is a high need to match product offer to identified market needs	Development of international marketing campaign to spa users and intermediaries for "export ready" spa resort – including collateral materials, media visits, Bucovina- tourism website feature, etc.	3 years First campaign by end 2011	Spa and Curative	Spa Owners Association	POR 5.2., POR 5.3. Own resources	
2.	Upgrade accommodation, treatment facilities and resorts to meet market needs Upgrade resort facilities and attractions Broaden the appeal of the destination beyond specific spa treatments so as to attract a wider range of visitors.	Upgrade hotels, modernize treatment facilities, introduce new wellness and beauty facilities Upgrade resort infrastructure in public area, provide entertainment and activities for visitors and inform visitors of attractions of region around the resort	At least 2 hotels in Vatra Dornei until 2013	Resorts in Vatra Dornei	Spa resort City Hall	Spa owners and operators	
3.	Identify market needs, potential and means of promoting to it. To determine if a foreign market can be developed and specify product enhancements needed to appeal to it. Identify promotional channels.	▪ Market research into the domestic and foreign market demand for traditional spa treatment; expectations of foreign markets of spa resorts; communicatio ns channels to spa clients	6 months Research complete by spring 2011	County Council	Spa Owners Association OPTBR or local members	POR 5.3. POR 5.2. POS DRU	
4.	By quantifying market	Assist spa resorts	Spring 2011	OPTBR	County	POR 5.2.	

	demand and product needs spa owners and resorts can make reasoned development and marketing plans	and owners identify product development requirements and advise market potential. Publish and present market research to the spa industry and resorts		and local authorities	Council Spa tourism working group		
MEDIUM PRIORITY							
5.	Spa resorts have to re-think their place in the modern market and upgrade and diversify based on an agreed future direction for the resort.	▪ Spa owners and local authorities to agree any re-positioning of the resort product range and image based on identified market demand. ▪ Spa resort Primarii to commission integrated resort development plans in collaboration with local spa owners ▪ Funding for the implementation of these plans to be identified and implementation undertaken	1 year Plan of development by 2010	Spa owners and Vatra Dornei City Hall	OPTBR Vatra Dornei resorts	POR 5.2.	
6.	Provide professional service levels in spa resorts. Upgrade current staff skills and develop new staff to welcome guests rather than "patients"	▪ Develop vocational training courses for spa treatment staff featuring nursing, guest relations, beauty treatments and wellness techniques	5 years First courses by end 2010	Spa owners and operators	Tourism Competence Center OPTBR	POS DRU	

9.2.7. Business Tourism. MICE (Meetings, Incentives, Conferences and Events)

Nr. Crt.	Facts and Objective (strengths, weaknesses, opportunities and threats)	Actions needed	Time frame and milestones	Responsible	Partners	Funding	Project Status
MEDIUM							
1.	**MICE (Meetings, Incentives, Conferences and Events)** Produce a marketing plan for international conference center in Suceava in Salcea The built conference centre is not capable of handling major international meetings and conventions, at top standards. The update and modernization, and also the construction of 4 stars hotels can bring significant additional business to Suceava and first time visitors to the region.	▪ Appoint specialist consultants to research the international meetings market and identify the optimum size and configuration of conference center in Salcea Suceava, trying to optimize the lost due un-operating spaces ▪ Marketing campaign to make much attractive Bucovina and the existing business hotels (Suceava, Humor, Dorna, Radauti) for MICE segment ▪ Prepare outline design specifications and costs of appropriate marketing campaign	12 Studies complete by spring 2011months	County Council	Primaria Suceava Chamber of Industry and Agriculture	Own resources	
2	Suceava has a lack of 4 and 5 stars hotel for business and conventions. Suceava needs additional attractions to generate off season business for country side hotels. The local and regional meetings market represents an opportunity for this.	▪ To attire investors in order to build 4 and 5 star hotels in Suceava, for convention and MICE Sectors, for NE Market and Cross Border Area					

9.2.8. Tourism Information

Nr. Crt.	Facts and Objective (strengths, weaknesses, opportunities and threats)	Actions needed	Time frame and milestones	Responsible	Partners	Funding	Project Status
HIGH PRIORITY ACTIONS – Tourism information							
1.	Establish a regional tourism database. This database is the source of data for websites, promotional materials and TICs - The data base should be updated periodically (at least one time/year)	▪ Establish a computerized tourism information database with sections updated by TICs, County Council, and with the help of Tourism Ministry licensing department and other authorized providers Provide data outputs to websites, TICs and other users.	6 months and on-going Database operational mid 2011 (1 year in order to have pictures with all seasons and events, made by professional photographers)	County Coucil Department	TICs and industry associations	POS DRU POR 5.3	
MEDIUM PRIORITY							
2.	To collect, coordinate and disseminate information on local events and activities in order to publicize rural tourism. Advance publicity of local events demonstrates the wealth of tradition activities for visitors and helps spread traffic	Tourism department to collect data on festivals and traditional events and publicize them. ▪ County Council to assist NGOs promote niche products and activities in rural areas.	On-going Increased list of traditional events and activities on website.		Local authorities, local associations and the TIC network	Own resources	
3.	To designate official Tourist Information Centers in the touristic areas. To increase the quality of tourism information. Maintain high quality standards for TICs so that visitors know what services they can expect from them.	To encourage the local communities to do their own tourism information center. Some mayors are reluctant in building a Tic in the localities, despite the fact that the locality is a touristic one. Such TICs should be also	6 months Common understanding reached in the first 2 months in 2010	County Council and territorial representatives	Local authorities Tourism associations	FEADR (for rural areas)	

		souvenir centers with authentic gifts					
4.	Enable TICs to recoup some of their costs and provide additional services. Visitors are prepared to pay for quality information and TICs should seek to reduce their costs by generating revenue provided this does not undermine commercial operators' activities	Authorize existing and future TICs to undertake commercial activities – publication sales and reservations.	2 years Legislation by spring 2011	Local authorities Tourism associations	FEADR (for rural areas		

9.2.9. Signposting

Nr. Crt	Facts and Objective (strengths, weaknesses, opportunities and threats	Actions needed	Time frame and milestones	Responsible	Partners	Funding	Project Status
HIGH PRIORITY							
1.	To continue the signalistic with a uniform national brown tourism road sign scheme. Tourism signage both facilitates tourist orientation and encourages additional visits. Avoidance of localize styles is desirable.	▪ Use the national criteria for brown tourism road signs and issue guidelines to local authorities Is a high need of writing information system (for self orientation of tourists from abroad)	1 year Guidelines complete by end 2010	Ministry of Transport – Romanian National Company of Motorways and National Roads	County Council	POR 5.2. FEADR	
MEDIUM PRIORITY							
2.	Devolve implementation of signage system to county and local levels	Develop plans and requirements for brown tourism signs for all roads together with costs	2 years All Suceava county by 2011	County Council	Local authorities are best placed to identify local needs and develop plans based on local knowledge		
3.	Secure majority grant funding for initial installation of signage to "public" locations. The initial requirement for signs is large and beyond annual budgets	Secure funding towards costs of implementation of signage proposals	6 years 30 requests made by end 2011	County Council	Local authorities	POR 5.2	

HIGH PRIORITY ACTIONS

4.	Secure private sector funding for signage to commercial tourism products and services. Reduction in "fly" posting of signs to private tourism businesses and reduction in signage costs to public	Disseminate criteria and application materials to private sector tourism operators	10 years System operating by 2012	County Council	Private sector operators	Private sector	

9.3. Destination Marketing

9.4. Internal Marketing

1.	Expansion to and improvement of existing tourism statistics collecting.	▪ Provision of updated market researches to Tourism Department ▪ Updating from Tourism ministry the studies about international market ▪ To advise upon the introduction of new data collection methodology and techniques at county level (quantitative and qualitative data)	3 months. New systems operational for 2011	County Council	Border Police Suceava Airport Ministry of Transport Ministry of Tourism The members of local associations within Bucovina	POR 5.3. POS DRU	
2.	Upgrade and increase the presence and availability of information on Bucovina's tourism electronically. For example www.descoperabucovina.com See web pages for international destinations: www.visitingscotland.com http://www.allgaeu.info/ To address the increasing trend for consumers to access the internet to research and book their travel and tourism destinations and arrangements	▪ Design and complete a regional tourism website in line with tourist markets' needs and interests. ▪ Develop material for website offshoots from the parent sites for major markets. ▪ Study and select for subscription all independent travel and tourism websites.	Immediate and ongoing Annual increase of 10% in site visits	County Council	Bucovina Tourism Association Private sector associations	POS DRU POR 5.3.	
3.	To refine the program of participation at foreign travel and tourism fairs to improve cost effectiveness To reduce wastage in respect of tourism fair participation and to establish monitoring and evaluation systems to enable cost effectiveness to be assessed.	▪ Establish the participation on tourism fairs concentrating initially on primary and opportunity markets. ▪ Establish a set of targets to be met (relating, for example, to new contacts generated and bookings achieved, people informed). ▪ Set criteria to be fulfilled by private sector participants as	Immediate and ongoing Fair targets met	County Council	Bucovina Tourism Association	Own resources	

		a condition for their subsidized participation					
4.	To create a strong destination image through the development of a powerful, coherent and persuasive brand as BUCOVINA E DAR.	▪ To update and complete the study done by GTZ for the perception in international & domestic tourist markets of Bucovina (eventually Romania too) as a destination offering a diverse and distinctive range of tourism products of special appeal to current tastes	6 months	County Council	Private sector associations, Regional Development Agencies, County and Town Councils	POS DRU POR 5.3	
5.	New brand adopted and used by local, national and international operators	▪ Appointment of a specialist national or international brand development creative agency, with experience in tourism, to research and define Bucovina's national tourism brand ▪ Define a strategy for its launch					
6.	To generate positive media coverage of Bucovina's tourist attractions and facilities through editorial features in general interest and special travel and tourism publications, television etc. As part of the image building activities for the country, there needs to be a series of articles and features that come in front of, and influence, the traveling public	▪ Stimulate, support and facilitate media visits to Romania ▪ Feature rural and ecotourism elements prominently as the most unique and positive images	Immediate and ongoing Tripling of editorial coverage 2012 to 2009	County Council and Tourism Ministry	Private sector associations and individual operators (i.e. transport companies, travel organizers, hotels and resorts)	Tourism ministry budget, county council, and in-kind by private sector	
7.	To access the necessary technical and management expertise to develop, direct and coordinate the program of marketing and promotional activities Outside assistance is needed in view of: the scale of the institutional changes and relationship building needs (between the County Council and the tourism private	▪ Recruitment of an International Tourism Marketing Specialist to assist the County Council Marketing executives to become established	functioning tourism marketing division in the County Council by end 2010 Minimum 1 year	County Council Private tourism sector and all other tourism stakeholders		POS DRU	

	sector); and the depth of the knowledge required of tourism marketing trends, techniques and tools	and proficient. We recommend also the cooperation with SES (Senior Experts Germany). They can provide					
8.	To equip travel industry personnel in international source markets with sufficient product knowledge and confidence to "sell" Bucovina to the traveling public There is a need to increase awareness of Bucovina's tourism product offering among the travel industry personnel of international source markets	▪ Design and operate a series of familiarization visits to Bucovina's tourist attractions and facilities for groups of personnel from tour operators and travel agents from primary international markets	Immediate and ongoing Inclusion of Bucovina in 5 additional operators' programs by 2011	County Council	Private sector associations and individual operators (i.e. transport companies, travel organizers, hotels/ and resorts) Tourism Ministry	POR 5.3.	
MEDIUM PRIORITY							
9.	**Market Research** Put in place a rolling program of market research to include both one-off and regular activities (See Annex 6 with type of questions and information needed for Coach Tourism)	▪ Conduct continual, seasonal, or annual visitor arrival/departure/expenditure and satisfaction surveys ▪ To monitor visitor arrivals/expenditure/ motivation/ attitude and satisfaction from their visit experience within Bucovina	On-going First studies in 2010	County Council Tourism Association (Bucovina and local)	Border Police Regional Direction for Statistic University Stefan cel Mare	Own resources	
10.	**Fair attendance and promotion**. To optimize and to do a long list of fairs, adapted of consumer trends for the tourists coming to Bucovina To monitor the costs and benefits of participation in these activities To become aware of market trends and opportunities that will inform future marketing and development strategy	▪ Conduct evaluation of trade fair/exhibition attendance ▪ Commence a program of planned market research targeting identified national markets and market segments ▪	On-going First studies in 2010, for the Fairs in Wien, Berlin, Madrid a.o.	County Council Tourism Association (Bucovina and local	Regional Direction for Statistic University Stefan cel Mare	Own resources	

11.	Assessment of the potential in key target market segments and identification of marketing strategy, positioning and program of activities to realize this potential. To provide detailed specification of the market opportunities for Romania's tourism and how best to exploit these to maximum benefit for the country	▪ Study of key primary and opportunity international markets. Particular attention to be paid to the youth tourism market segment.	3 years – on basis of 3 a year periodic study	County Council, Tourism Department	All private sector associations	Own resources	

9.5. Human Resources Management

Nr. Crt.	Facts and Objective (strengths, weaknesses, opportunities and threats)	Actions needed	Time frame and milestones	Responsible	Partners	Funding	Project Status
HIGH PRIORITY ACTIONS							
1.	Improve the quality of training in tourism, with connection to the tourism practice EITHER Create one focal point of all HRD and training activities to initiate, organise, coordinate and monitor all training activities In order to ensure hospitality training keeps up to date with industry needs, a strong private-public sector partnership is needed to oversee developments	**HRD Organisation and Coordination** ▪ Establish a strong HRD, Training and Tourism Awareness department within the tourism department at tourism county ▪ Establish a regional training structure (Tourism Competence Center in Bucovina)	Ongoing Committee established by 2010	County Council	University "Stefan cel Mare" Suceava Econo-mic High School from Suceava	Own resources POS DRU	
2.	Create a separate independent NGO body to initiate, organise and coordinate Tourism Awareness Training and Industry Upgrading Training through its mobile training team (See the Annex "Tourism Competence Center") It should be created a framework for hands-on training and vocational training in tourism. Such a training structure should be mobile, in order to organize training programs in all 7 tourism districts within Bucovina.	<u>Alternative:</u> Establish a Mobile Hospitality Training Foundation or Association named "Tourism Competence Center" (TCC), headed by a Managing Director, employing trained and qualified mobile trainers, controlled by a Management Board, representing public and private sector	Foundation established by end 2010	County Council	Private sector association University "Stefan cel Mare" Suceava Economic High School from Suceava	Own resources POS DRU	

3.	**Low Tourism Awareness on the field** A Train-the-trainer approach will have the best possible multiplier effect, because of the high quantities and the language barrier. The implementation of this program is a continuous process which will take at least some years **Upgrading Existing Skills.** Develop general tourism awareness and visitor satisfaction for industry staff	▪ Train mobile trainers and develop courses on tourism awareness and visitor satisfaction (Int. Expert) ▪ Conduct tourism awareness training seminars within the industry (Mobile Trainers) Conduct applied training seminars on hospitality and tourism awareness and guest satisfaction for spa resort employees, including medical and para-medical staff (Mobile Trainers)	5 weeks 2-3 years Mobile trainers trained and operational	County Council Tourism Associations	Int. trainers or experts Univer-sity of Suceava Trade Associations	POS DRU POS DRU	
4.	Capacity building and Institutional strengthening of tourism administration level. In order to create a strong tourism administration committee, implementing government policy and strategy and provide services to the private sector, qualified staff is a critical factor (at county level and at local communities level)	Upgrade tourism administration and organization skills (planning and development, research and statistics, marketing and promotion, etc.). Int. expert and local trainers.	2 years 2 staff trained per month 2010 to end 2011	County Council	University of Suceava Int. Experts	POS DRU	
5.	Providing Information to Tourists is a skill. This includes collection, preparing, producing and displaying tourist information.Upgrading course on Tourist Information skills through external TA expert together with 3 local trainers (eventually GTZ, that has done the training of CIT in behalf of Tourism Ministry)	Train the existing Tourist Information Officers in Tourist Information and Visitor Centre operations	3 months January 2010	County	County and town councils Univer-sity of Suceava (Faculty of Econo-mics, Tourism Department) Tourism Associations	POS DRU CBC	
PRIORITY – MEDIUM							
6.	**Tourism Awareness in public and private structures** In order to create a strong network of professionals, implementing tourism policy and strategy and provide services to the private sector, qualified tourism staff at local level is a critical factor	**"TOURISM Competence Center" program** Conduct short applied training seminars on hospitality and tourism awareness for officials from Suceava County	3-4 months	County Council	University Stefan cel Mare, Suceava Consulting Companies Int. experts	POS DRU	

		(Mobile Trainers) 7 courses by end 2010 (one in each tourism region: Gura Humorului, Siret Radauti, Campulung s.a.					
7.	Develop general tourism awareness and visitor satisfaction for public sector tourism officials. Many employees and officials are not directly involved in the hospitality and tourism industry, but are dealing directly with tourists and their performance is also critical for visitor satisfaction and the image and reputation of the country.	▪ Conduct applied training seminars on tourism awareness and visitor satisfaction for immigration, customs, border police at international airports and border posts. (Mobile Trainers) Conduct short applied training seminars on tourism awareness and visitor satisfaction for museum staff (Mobile Trainers)	1 year 4 courses by end 2010 4 courses by end 2010	County Council	Ministry of the Interior ,Ministry of Finance Ministry of Culture and Cults	POS DRU POS DRU	
8.	Develop general tourism awareness and visitor satisfaction for special groups indirectly involved in tourism but directly dealing with tourists. Develop general tourism awareness and tourism understanding among public authorities (benefits of tourism development) .The understanding of the basic principles of hospitality and tourism is critical for national, regional and local decision-making authorities. This includes the 7 regions within Bucovina.	Develop and distribute a tourism awareness "toolkit", containing flyers and other material containing basic hospitality and tourism awareness information (TA Expert)	3-4 months Toolkit distributed by end 2011	County Council	County and Town Councils of the 7 tourism regions identified in Bucovina	POS DRU	
9.	Start modern formal hospitality training in Bucovina. Train according to the quantitative and qualitative needs of the hospitality industry. Train for jobs and according to occupational standards. Train according to European hospitality training standards	**Formal Vocational Training** Develop a network of practical training in Hospitality Training or a Hotel School, in partnership with European hotel schools, who will assist in curriculum development, teacher training, cooperation and exchange. A number of existing non-	3 years First institute open by end of 2013.	County Council Private initiatives	University of Suceava Ministry of Education, Research and Youth European Hotel schools	POD DRU and private sector	

		operational hotels can be transformed into regional hotel schools, by developing practical training facilities.					
10.	Improve formal vocational training for the travel and tourism sector Train according to the quantitative and qualitative needs of the travel and tourism industry Train for jobs and according to occupational standards. Train according to European hospitality training standards	▪ Start and facilitate specialized formal vocational hospitality training ▪ Review and update the course structure, curriculum, syllabus of travel and tourism related courses at existing specialized training institutes (T Expert) ▪ Develop up-to-date occupational standards (T Expert) Develop up-to-date European tourism training standards (T Expert)	6 months Changes introduced by end 2011	County Coucil	Ministry of Education, Research and Youth University of Suceava	POS DRU	
11.	Create Training Awareness within the Hospitality and Tourism industry. To create better awareness and understanding about the needs and importance of continuous on-the-job staff training. “Training staff is an investment, not a cost”	Hospitality employers training awareness campaign (media, conferences, publications)	12 months Initial campaign complete by mid 2011	Tourism Association (Bucovina, Sucevita, Vama a.o.)	Trade Associations Trade Magazines	POS DRU	
12.	Better supervised staff is happier staff and happier staff is better staff providing better quality of services Only part of the staff needs to be pre-trained. Unskilled staff can be trained on-the-job by supervisors and managers trained on in-house training techniques. Supervisors need upgrading in operational skills to train and supervise staff Upgrading supervisory and management skills Train supervisors on in-house on-the-job training techniques	▪ Train-the-trainer mobile training team (T. Expert) ▪ Development multidisciplinary course programme (T Expert + Mobile Trainers) ▪ Curriculum and course material development (T Expert + Mobile Trainers) ▪ Programme marketing, PR and organization	3 years Programme launched by end 2010	Tourism Competence Center	Trade Associations Private sector	POS DRU	

	Upgrading operational skills for middle management level	▪ Programme implementation (Mobile Trainers)					
13.	To improve and upgrade the tourist guiding skills of licensed tourist guides Upgrading operational skills on a variety of disciplines and subjects. To improve operational skills in order to provide better quality service in the hospitality and tourism industry. To strengthen the competitive position towards successful and sustainable tourism development.	▪ Development multidisciplinary course programme (TA Expert + Mobile Trainers) ▪ Curriculum and course material development (TA Expert + Mobile Trainers) ▪ Programme marketing, PR and organisation (NTO/HRD or MHTF) Programme implementation (Mobile Trainers)	3 years ongoing Program launched by end 2010	Tourism Competence Center	Trade Associa-tions Private sector	POS DRU	
14.	Upgrading of the existing Tourist Guiding skills and improve the licensing system and requirements for Tourist Guides	▪ Develop and implement upgrading course on Tourist Guiding skills (T Expert) ▪ Review the qualification criteria and improve the existing registration and licensing requirements for Tourist Guides (T Expert) ▪ Improve the existing tourist guide training by integrating the specific tour guiding skills in the curricula, according to European standards (T Expert)	4 months 2 courses run in each year	Tourism Competence Center	Professional Associations within Bucovina ANAT and trade associations	POS DRU	
15.	Providing Information to Tourists is a skill. This includes collection, preparing, producing and displaying tourist information.	▪ Train new Tourist Information Officers in Tourist Information and Visitor Centre operations ▪ New local trainers to train newly recruited	1 week courses First courses run by end 2010	County and town councils		POS DRU	

		TIC staff.					
16.	Develop public tourism awareness. It is important for the public to understand hospitality and tourism and appreciate the importance and benefits for the country and its economy.	▪ Develop and implement a number of public tourism awareness campaigns (TA Expert)	2 years First public campaign run by end 2010	Council	County and City Councils	POS DRU	

Part 4 (Recommendation for Monitoring Projects) Action and Time Plan Bucovina Tourism Strategy

10 Ongoing Projects / Activities / Measures

We recommend setting up a fact sheet including a project code for each project. In order to achieve an overview, it makes sense to fit each project and its code into a matrix such as the one below (or one to be defined). For examples, please refer to Chapter 12 "Recommended Projects".
Table 12 offers an overview which types of tourism within the Bucovina or which destinations within the Bucovina are affected by current projects.

Destination / Type of Tourism	Bucovina	Suceava	Falticeni	Radauti Siret	Gura Humorului	Campulung Moldovenesc	Vatra Dornei
Mountain and Active Tourism							
Balneary, Health Tourism							
Rural Tourism							
Religious Tourism							
Active Tourism							
Educational Tourism							
Cultural Tourism							
Business Tourism							

Table 12. Matrix ongoing projects per type of tourism and per destination

In addition, Table 13 shows in which fields of activity in the Bucovina as a whole or within a single destination projects are being done.

Destination / Field of Activity	Bucovina	Suceava	Falticeni	Radauti Siret	Gura Humorului	Campulung Moldovenesc	Vatra Dornei
General conditions	100190 100990						
product development	100190 190290						
Destination marketing							
Internal marketing							
Human resource development							

Table 13. Matrix ongoing projects per field of activity and per destination

We recommend compiling the fact sheets of current projects and assign the fields of activities and fill in the project codes into matrices such as above.

11 Projects in Preparation

In addition to those projects already planned, there is a row of projects which will help achieve the vision for 2013 which are still in a so-called project pipeline. For overview purposes, these pipeline projects are put into the matrices below. For examples, please refer to Chapter 12 "Recommended Projects".

Destination / Type of Tourism	Suceava	Falticeni	Radauti Siret	Gura Humorului	Campulung Moldovenesc	Vatra Dornei
Mountain and Active Tourism						
Balneary, Health Tourism						
Rural Tourism						
Religious Tourism						
Active Tourism						
Educational Tourism						
Cultural Tourism						
Business Tourism						

Table 14. Matrix projects in preparation per **type of tourism and per destination**

Destination / Field of Activity	Bucovina	Suceava	Falticeni	Radauti Siret	Gura Humorului	Campulung Moldovenesc	Vatra Dornei
General conditions							
product development							
Destination marketing							
Internal marketing							
Human resource development							

Table 15. Matrix projects in preparation **per field of activity and per destination**

We recommend compiling the fact sheets of planned projects and assign the fields of activities and fill in the project codes into matrices such as above.

12 Projects Recommended as Result of Cooperation GTZ / Suceava County

Besides the ongoing and planned projects which will help the Bucovina reach the vision 2013, there is, as we have identified, still the need for a number of additional projects to meet challenges and to achieve a sustainable tourism development in the Bucovina. In order to ensure transparency and to enable a comparison of the projects, this report includes a fact-sheet per recommended project next to the respective matrix.

12.2 Internal Marketing Project

The fact sheet for the recommended project in the field of internal marketing is included in the attachments to this paper (see attachment 16).

12.3 Strengthening Tourism Institutions in the Bucovina

The fact sheet for the recommended project in the field of institution building is included in the attachments to this paper (see attachment 21).

12.4 Human Resource Development

The fact sheet for the recommended project in the field of human resource development is included in the attachments to this paper (see attachment 22).

12.5 Development and Implementation of a Project Management System

The fact sheet for the recommended project in the field of project management is included in the attachments to this paper (see attachment 23).

Part 5:
Final Remarks

The tasks associated with this project are outlined in attachment 3. In the course of the development of this strategy paper, the following points became clear:

1. A tourism strategy including many detailled studies was already available which needed an update.
2. The levels of understanding of the workings of the tourism sector are very varied among the stakeholders involved.
3. No-one is fully informed on all tourism relevant projects planned, in preparation or under way nor of the various funding channels available.
4. There is a lack of transparency and of monitoring systems due to a lack of necessary management tools.

The needs in connection with the above mentioned issues and the weaknesses in the current system became more and more clear in the course of the project and so this tourism strategy paper has become not only that but has been amended with a large selection of tools which have been designed to help the stakeholders involved to tackle the issues and overcome problems that are mentioned. These tools are included in the strategy paper or are attached (see for example attachment 10).

This guideline can be seen as a tool for

- improving the general understanding of the tourism sector,
- clarifying responsibilities,
- pointing out the importance of a sound tourism strategy,
- and, in attachment 17, a recommendation for increasing transparency.

Human resource development is an important issue for the Bucovina and a recommendation for the foundation of a tourism school is also attached (attachment 17).

H&A has taken this project a lot further than could be originally foreseen. This added value was due to some very involved and interested people who supported the work and went to great lengths to deliver data, information and ideas. H&A wishes to thank everybody involved in the development of this tourism strategy paper and for the excellent cooperation of all.