



LEONARDO DA VINCI PROGRAMME

**ECO-ROUTE. – A ROUTE TO SUSTAINABLE RURAL DEVELOPMENT THROUGH
ECOTOURISM LABELLING**

**NATIONAL SURVEY REPORT
ROMANIA**

DRAFT

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1.0 Introduction

1.1 Aim of the report

The aim of this report is to provide a record of the natural and cultural resources of the North Carpathian Area and present the results of the survey of ecotourism activities and businesses in the pilot region, so that the feasibility of introducing a labelling system for selected activities and services can be assessed. The survey investigated the experiences, attitudes and aspirations of entrepreneurs involved in ecotourism activities, in order to draw an action plan for ecotourism labelling, so that a training package may be put together to help entrepreneurs appreciate and apply the criteria for ecotourism certification.

More specifically, the survey conducted in the pilot region aimed at providing the project team with the following information:

- a realistic record/inventory of natural and cultural resources and activities suitable for ecotourism development in the pilot area;
- a record of the businesses involved in their delivery;
- an assessment of current demand and practice of ecotourism in the pilot region as perceived by local businesses and individuals involved in ecotourism (i.e. tour operators, local tourist service providers, professional guides, representatives of NGOs and training organisations that advocate environmental protection and ecotourism development, etc);

1.2 Methodology

The sources for the report of ecotourism activities and businesses/individuals involved in their delivery were: published material; face-to-face interviews with competent officials of the local authorities and competent government services and other key individuals involved in ecotourism; face-to-face, fax, e-mail and telephone interviews with local entrepreneurs, professionals and individuals involved in ecotourism or with an interest in it, based on the questionnaire prepared for the survey of ECO-ROUTE Work Package 3 (see Annex).

In total, 41 interviews were conducted, involving:

- Discussion (face-to-face and telephone) with representatives from Maramures County Council, Bihor County Council, National Authority for Tourism, Office for Control and Authorisation
- Face-to-face interviews with five representatives of local communities (Baia Mare, Sighetu Marmatiei, Ocna Sugatag, Sapinta and Negresti) regarding their interest about development of tourism in the area
- Discussion by telephone with RENAR (Romanian Accreditation Association)

- Face-to-face interview with WWF experts (Baia Mare office)
- Face-to-face interview with a consulting company oriented to tourism activities (IDM Consulting Sighetu Marmatiei)
- Face-to-face, telephone interviews and exchange of information by e-mail with 12 organisations and associations oriented to development of tourism activities and environmental protection (Romanian Ecotourism Association, Ecologic Association, Gotech Sport Club, Ecotop Foundation, Pro Viseu Foundation, Apuseni Experience Bihor, etc)
- Face-to-face discussion with representative of Regional Development Agency – Baia Mare Office regarding the projects related with tourism implemented in our area
- Face-to-face, telephone interviews and exchange of information by e-mail with 12 entrepreneurs and guides involved in ecotourism activities in the pilot area

Moreover, more than 40 questionnaires were distributed via e-mails, faxes and direct to local tour operators in the pilot region, tour operators from Romania and other NGOs, collective bodies and tourist association and we received 18 questionnaires.

1.3 Structure of the report

The report is divided in three parts, as follows:

1. Part A includes an inventory of the activities that are pursued in North Carpathian Area, the resources available for these activities and the businesses involved in their servicing, drawn by secondary and primary sources from desk research and contacts with key individuals who have a good knowledge of ecotourism in the area.
2. Part B includes the analysis of the findings from the questionnaire survey of local businesses and individuals involved in ecotourism (tour operators, guides, accommodation providers etc) through face-to-face, fax, e-mail and telephone interviews. The questionnaire sought to record businesses profiles; current demand for ecotourism; practices of ecotourism that are met in the region and principles and standards applied in service provision; and the service providers' evaluation of the prospects and potential problems with respect to the application of an ecotourism labelling system; their wish to be certified, the criteria the ecotourism label should include and the interviewees' recommendations for promoting the area as an ecotourism destination.
3. Part C draws the conclusions of the report, including an assessment of the need for and feasibility of introducing an ecotourism labelling system in the pilot region, in order to provide input for the synthesis report on the implementation of ecotourism labelling in each participating region. A provisional list of the items for consideration in order to prepare the action plans is also included.

**PART A. COMPILATION OF AN INVENTORY OF THE ACTIVITIES THAT ARE PURSUED IN
THE PILOT AREA, THE RESOURCES AVAILABLE AND THE BUSINESSES
INVOLVED**

A.1 Inventory of existing ecotourism activities in the pilot area

Following the discussions with the tour operators and other organisations / institutions that are involved in the tourism activities we agree that the ecotourism activities offered in the pilot area are under development and take place especially in the mountains, the rivers and the rural area.

More specifically:

- In our area, the most popular activities are:
 - hiking in the rural area and the mountains
 - cultural and religious routes – folk music and dance, village and art museums, visiting the wooden churches and monasteries, traditional crafts
 - winter sports
 - flora and fauna watching
 - participation in the farmers / shepherds' life
- other ecotourism activities that could be developed in the area:
 - horseback riding
 - cave exploration
 - mountaineering, climbing and rafting

A.2 Record of natural and cultural resources in the pilot area – designated protected areas

Maramures has long entered both national and international tourism circuits. There are many assets this area can boast. Its variegated scenic landscapes - ranging from mild meadows nestling fairy-tale hamlets to alpine wilderness - will delight the trekker, the photo-hunter or simply the outdoor enthusiast. Skiers will be attracted by the resorts in the Rodna or Gutai Mountains. Hunters and anglers will be delighted to discover Maramures's profusion of game and fish. And anyone loving rural simplicity will enjoy the village of Maramures, with its unmatched wooden architecture, its traditional costume, music and dance, its vivid folk festivals and, last but not least, its open-hearted and hospitable people.

This increasing demand has been met with a larger supply on the tourist market; new travel agencies have mushroomed along with foundations for green or cultural tourism and local associations for rural tourism. A larger choice of programmes is now

available: not only the already traditional folk art trails and crafts trails, but also suggestions and guidance for the enthusiasts of hiking, trekking, hunting, angling, kayaking, mountain bike, mountain climbing, skiing or paragliding.

Accommodation.

Camping sites are definitely insufficient, many of these lacking basic facilities. Toilets and showers are rundown, there are no electricity plugs for caravans, many locations are either improper or too noisy. The solution of camping in the wild may be romantic, but it has some risks (wild animals, intruders). Many peasants will not object to your pitching your tent or placing your caravan in their yard or orchard, and you might find yourself invited for dinner, chat and have a glass of brandy.

The ideal alternative for the tourist travelling in rural areas is the accommodation at the family-run farmhouses. Not only that you will gain an insight of the life in a traditional country farm, but besides you will be happy to know that the money you paid for accommodation and meal will help to keep this lifestyle alive. These guesthouses usually offer full boarding, but B&B or Dinner, Bed & Breakfast or self-catering may be arranged with the owner.

Restaurants.

If you want to find how traditional food tastes like, you should make for the family-run guest-houses. There you will find more about *ciorba* (sour soup), *sarmale* (mincemeat rolls wrapped in cabbage leaves), *mamaliga* (a sort of dense maize porridge), *tocana*.

Vegetarians might have a hard time in Romania, since vegetarian food seldom appears on menus. The ideal solution is to ask for a simple *salata* (salad, that usually comes with the second course) and eventually a *mamaliga* with cheese. Maramures is a big producer of cow and sheep cheese. If you feel like having a go at it, buy some from the market or just drop in at some shepherd's hut.

The traditional beverage is the so-called *tuica* or *horinca*, a strong double distilled plum brandy. It's a tricky strong drink. The glass of *tuica* is hard to turn down when invited in a peasant's house or at a wedding, since long friendly libations are a token of amicability and open-heartedness.

Spas. Maramures boasts over 100 mineral water sources, around which several local spas were established, such as Ocna Sugatag (rheumatic, nervous and gynaecological diseases), Costiui (rheumatic, gynaecological and locomotor-related ailments), Carbanari, Desesti (gastro-intestinal and hepato-biliary affections).

Hikers and mountain trekkers may admire Maramures's varied and scenic landscapes accessible through a network of forestry trails or marked footpaths. Every travel agency offers leaflets or booklets on local tourist routes that include detailed maps and updated

information on access roads, orientation, accommodation and the most interesting sights along particular trails.

The most rewarding treks are those in the Rodna Massif whose Mount Pietrosu is the highest of the whole of the North of Carpathians Mountains (2305 m). Abounding in plant and animal rarities, Rodna Wildlife Reserve has been declared UNESCO Reserve of the Biosphere.

Because of the absence of any chalets and the scarcity of basic accommodation above 1500 m - longer trips imply either camping or staying overnight in shepherds' huts.

One great advantage of the Rodnas is that its footpath network is the only one that is satisfactorily waymarked. For trips in other mountains - no less enjoyable - the hiker should depend on a compass and a good map.

Several scenic lakes and ponds - such as those at Firiza, Mogosa, Nistru, Ferneziu -dot the less high Gutai Mountains (in the 1300-1400 m range) that lie to the North of Baia Mare, within easy access. The towns of Baia Mare or Baia Sprie may be good bases for many interesting one-day trips to the peaks of Ignis, Plestioara, Gutai or Creasta Cocosului.

The Tibles Massif (highest peak, Mt Tibles 1839 m) offers many exciting routes either from the village of Grosii Tiblesului, or from the Land of Maramures.

The superb wild Maramures Mountains whose ridge constitutes Romania's natural border with Ukraine, are thickly wooded and rich in game and fish, but are less trodden because of their lack of basic path waymarking and signposting.

The enthusiasts of **hunting and fishing** will not fail to discover Maramures profusion of game and fish. Hunters may take part in chases after deer, chamois, wild boar and roe deer or shoot hare, black grouse, woodcock and pheasant.

Anglers may choose among fishing in either mountain or plain watercourses as well as in ponds. Carp, pike and zander may be captured against a day fee in the dam lake of Firiza and the ponds of Remetea Chioarului and Doua Veverite-Lapusel. Provided you have a license issued by the local branch of AVPS, you can have great satisfaction in angling chub, broad snout and catfish in the rivers of Tisa, Lapus (in the area of its gorges), Viseu and Someş. According to regulations, the trout may be captured in the valley of Vaser only between 1 May and 15 September.

Winter Sports. Skiers will enjoy sliding down the ski runs at the mountain resorts of Borsa Izvoarele or Mogosa.

Borsa Complex located at the foot of the Rodna Massif, is an attractive resort throughout the year. Several ski runs cover a 1000 metre-high slope. There are also a few cross ski routes of 4 to 6 km long. Of the two ski jump slopes, each 80 m long, one

is Europe's highest natural ski jump. The main ski run is 1920 m long, 497 high and is outfitted with chair lift and ski tow.

Izvoarele is a resort at 30 km from Baia Mare located at the foot of Mount Ignis on an alpine plateau at 916 m above sea level. A quiet location, plenty of ozone, ski lift and cross ski routes are the resort's main assets.

One of the most accessible resorts, Mogosa is situated at only 15 km from Baia Mare in a picturesque location, on the bank of the Bodi Lake, under Mount Mogosa (1246 m). The fine ski run is 2100 m long and is outfitted with a ski lift.

Bicycle tourism In case you plan to come by bicycle, be aware that Romania has virtually no special lanes for bicycle riders. Because of the somewhat hectic traffic, you should avoid travelling at night.

Adventure Sports. At Mogosa, the height difference of some 400 m, the air currents and the existence of the ski lift provide ideal conditions for hang-gliding.

In the rainy season, when the water level is high enough, the Lapus Gorges, with its small rapids lining from Razoare to Remecioara, is a strong temptation for the practitioners of kayaking or rafting. Similar attempts of rafting were made along the Vaser valley. Here the presence of the narrow gauge train may help you to carry the equipment.

Cultural tourism Once you visited the large museums in Baia Mare and Sighetu Marmatiei, you haven't seen all of it. You might chance upon small treasures (historic relics, artifacts) hoarded in tiny rural museums or memorial houses. Or you might stumble upon fine collections of old books, icons on wood and glass stored in some remote church or convent.

Strolling across the old town, the connoisseur of the Baia Mare Painting School will recognize many of the places that have been the inspiration of many generations of painters for the last century: Dealul Crucii, Dealul Florilor, the Graveyard, the town park, Podul Viilor street, the old square. A visit at the Art Museum in Baia Mare will enable him to see the paintings of the great artists of Baia Mare, such as Hollosy Simon, Ferenczy Karoly, Thorma Janos, Ziffer Sandor. If you are interested in the personality of Hollosy Simon, don't forget to visit Sighetu Marmatiei and the village of Teceu.

Religious tourism Those interested in religious life, will discover here more than mere monuments. Certainly, Maramures is a country of dozens of wood churches, which do not stay locked as architecture monuments, but remain opened to the parishioners that fill them every Sunday. Besides, there are a lot of active monasteries that attract thousands of pilgrims in impressive processions. Some of these convents, such as that of Rohia, own worthy collections of rare books and manuscripts.

Rural tourism. The tourists' main interest in Maramures is the village seen both as an idyllic retreat and a synthesis of an impressive folk spirituality.

The nostalgists of simple country life those willing to experience Maramures's many charms right from the centre, may now choose among the many guest houses run by farmers or country people. You may eat food prepared at the farmhouse; sample dairy products that are indeed 100% natural; drink *tuica*, the famous plum brandy; attend village festivals or weddings; let your children see genuine cows, sheep or chickens. All these family-run guest houses meet the standards established by the Office for Licensing and Control in Tourism and are part of local associations for rural tourism.

A.3 Record of businesses involved in the delivery and support of ecotourism activities

Generally speaking, most tour operators offer accommodation or other tourists services like transportation, airplane tickets and very few offer ecotourism activities such as paragliding, rafting, horse riding, climbing.

But, because our area is rich in natural and cultural resources that are suitable for the development of tourism, more and more travel agencies have special ecotourism activities. More specially, travel agencies like Mara International Tour, North North West that are located in our area or travel agencies located in other part of Romania, such as Aventours & Roving Romania Ltd (DiscoverRomania) located in Brasov County, offer special program for tourists in the target area.

At the Firiza lake there is a club of sporting canoeing that has arranged a buoyed route. Near the airport of Tautii Magheraus an air club (Aeroclubul Maramures) runs courses of gliding and sky diving.

There are two Equestrian Clubs, "Transilvania Sport Horse" and "Stefan cel Mare Horseriding Centre" that are located in our area and are offering specific services for tourists and training.

Maramures area is very well known for tourists services in rural area. There are more than 50 private guesthouses members of different Rural Association such as ANTREC, OVR, Bed&Breakfast, MTMM, which offer to their customers ecotourism activities like: participation in farmers / shepherds life, archaeological and cultural tours. Also, there are a lot of craftsmen which offer to tourists handicraft made in wood, textile, ceramics (<http://craft.cdimm.org>).

PART B - RESULTS FROM THE SURVEY OF BUSINESSES AND INDIVIDUALS INVOLVED IN ECOTOURISM ACTIVITIES IN THE PILOT AREA

B.1 Profile of businesses and individuals interviewed

In the survey conducted in the pilot region, 17 tour operators & accommodation providers and 9 representatives of NGOs & training organizations were interviewed.

As is possible to see in the pie charts below (table 1 & table 2), the majority of business are small (88%) and they are operating the whole year (77%). We have to specify here that there are few months with very few tourists or to have tourists especially only during weekends.

Table 1

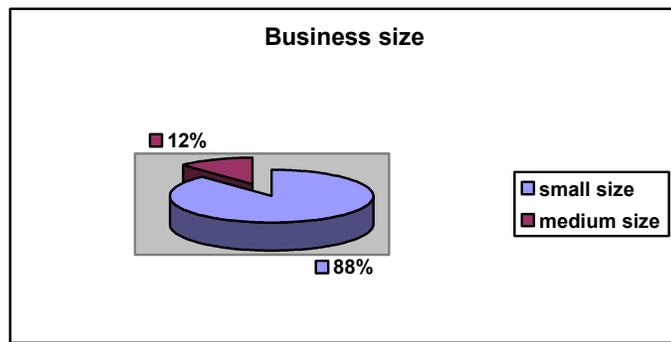
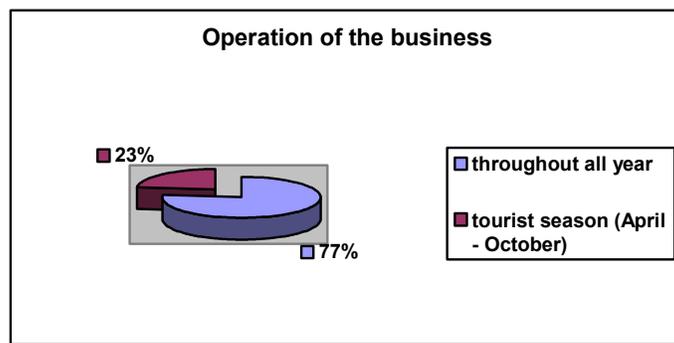


Table 2



The majority of the interviewees (80%, Table 3) use computers in their activities to make different kind of registrations, management, accountancy or communication with partners. But, only 58% (see Table 4) use the Internet to market their activities and not all of them have their own web site. One good think is that few of them are preparing a presentation to put on the Internet.

Table 3

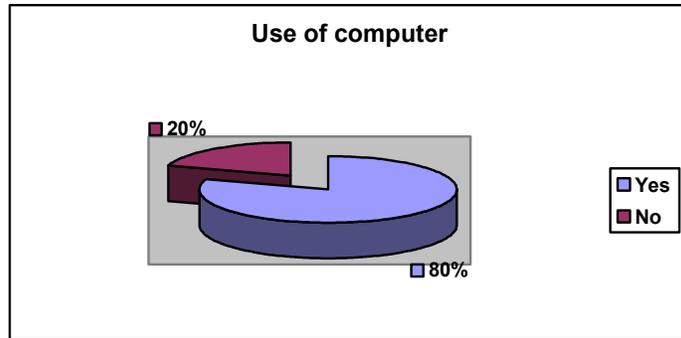
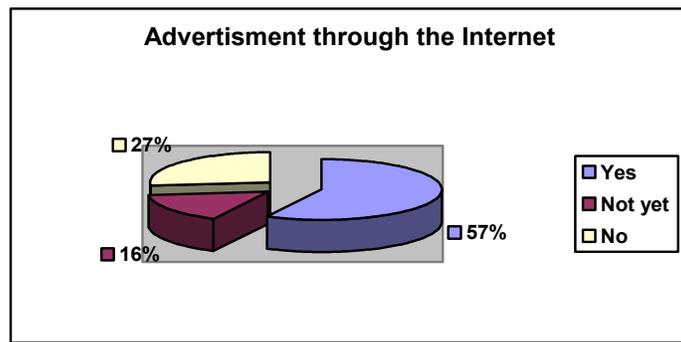


Table 4



Not more than half of the interviewees are members of national collective bodies, like The National Association of Travel Agencies (ANAT), Romanian Ecotourism Association (AER), or local / regional association like Operation Village Roumaine or Pro Viseu Foundation. Some of the interviewees consider that they don't have any advantage to be member of a collective body only to pay some money without any result. Unfortunately, a lot of NGOs (associations or foundations) are in Romania but, only few are with good activities and with good results.

B.2 Current demand for ecotourism activities

More than half of the interviewees (66%, Table 5) said that there is a demand of ecotourism services and some of them (23%) said that this demand is increasing. There is no a very good promotion of the ecotourism activities. Half of the entrepreneurs replied that their customers are equal shared between foreign tourists and Romanian tourists (see Table 6).

Table 5

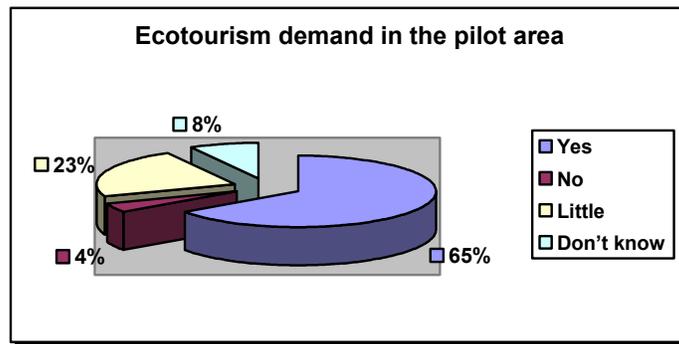
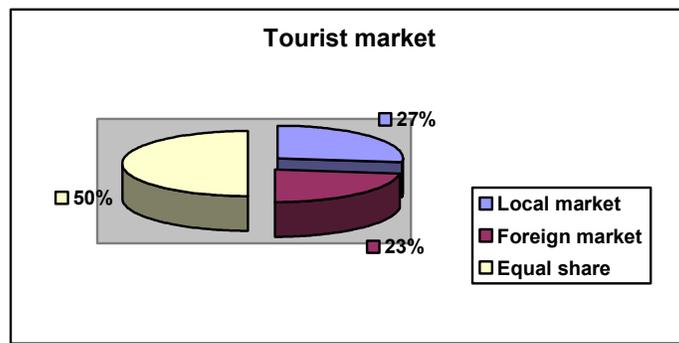


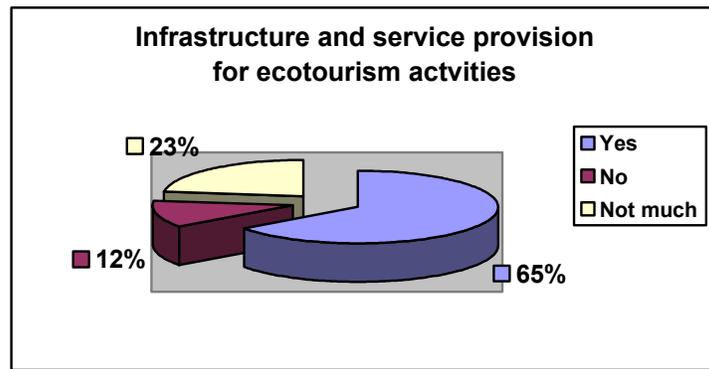
Table 6



B.3 Infrastructure and service provision for ecotourism activities in the pilot area

Most of the interviewees said that there is a good infrastructure and service provision for ecotourism activities, especially for accommodation in rural area. But, also, is necessary to be involved public administration to made some investments in infrastructure (signing of paths, access roads) and a good promotion of the ecotourism activities.

Table 7



B.4 Prospects

The ecotourism activities that were recurring more often in the interviewees' responses, as offered in the area and having good potential for further development in the pilot region were hiking tours, cultural routes, winter sports, flora and fauna watching, participation in farmers / shepherds' life, fishing, bicycle tours and traditional crafts. Others ecotourism activities that could be developed in the area it possible to be: horseback riding, cave exploration, archaeological tours, mountaineering, rafting. Unfortunately, no one suggest that they can or they want to provide ecotourism for disabled. But, they are very interested to expand their business to support ecotourism activities.

B.5 Perceived need for ecotourism certification - wish to be certified and trained - proposed criteria for ecotourism certification

It is a good thing that all of the interviewees are interested to participate in training courses in order to be certified in ecotourism. That means that they want to increase the quality of the services offered and they recognised that a certification is necessary as a guarantee of a good tourism service.

The questionnaire (question 10) included a list of the criteria that are used for the ecotourism label “Nature’s best” granted by the Swedish Ecotourism Association. These criteria are:

- 1 Respect nature and culture of the area;
- 2 Support the local economy;
- 3 Make all business’s operations environmentally sustainable;
- 4 Actively contribute to conservation of the natural environment;
- 5 Promote training of staff and the spirit of exploration;
- 6 Promote quality and safety in all ecotourism activities.

Interviewees were asked to classify these criteria as either “very important” or “of less importance” criterion and/or suggest others not included in the list. The results obtained were analysed and tabulated in the following table (Table 8).

Table 8: Proposed criteria for an ecotourism label

Criterion	“Very Important” No of responses	%	“Of less importance” No of responses	%
1. Respect nature and culture of the area	24	92	2	8
2. Support the local economy	18	69	8	31
3. Make all business’s operations environmentally sustainable	18	69	8	31
4. Actively contribute to conservation of the natural environment	24	92	2	8
5. Promote training of staff and the spirit of exploration	17	65	9	35
6. Promote quality and safety in all ecotourism activities	20	77	6	27

It is necessary to be mentioned here that we had another to proposals: correct marketing and tourism satisfaction.

B.6 Existing ecotourism certification systems in terms of:

i. Skills

Unfortunately, there is a lack of information about the certification systems, around half of the interviewees don’t give us any answer, because they don’t know. Only few of them said that they know that there is a certification system in other countries (Sweden and Australia). There is no certification, officially recognised, regarding some ecotourism activities (ex. for rafting, canoeing, climbing, hunting, fishing, ...). The certification is compulsory for flying and is done by Romanian Airclub, which is a state

organisation under umbrella of Ministry of Transport, Construction and Tourism. There is a private school named ASPAR for paragliding which is located in Cluj Napoca and is certified by Romanian Airclub.

It was mentioned the initiative of the Romanian Ecotourism Association regarding the implementation of an ecotourism certification system in Romania.

ii. Facilities

It was mentioned the certification system for accommodation in Romania and also the initiative of the government to start to implement this year a quality certification system for accommodation: “Q” Mark.

The tourist is ensured for the risk of insolvency and/or bankruptcy of the tourist agency that provided the services (the tourist agency is obliged to be insured with an insurance agency). The health insurance for the tourist is not the agency obligations, it is optional and it will be done only if the tourist requires. There is the possibility to have a health insurance for some sports activities in certain conditions. Some insurance companies doubled the rate for insurance for dangerous sports or they have a special product for hunting and fishing. Other insurance companies have a special product only for hunting and fishing, not for dangerous sports. Some of the tourist operators (like paragliding or other extreme sports) sign with the tourists a document that they agree that is an dangerous activity and they will not claim for damages.

iii. Equipment

Only few of the interviewees replied that they know that the equipment is necessary to be certified for the ecotourism activities that are offered to the customers. Also, the same situation if the equipment is rented by the clients. For equipment that is used for paragliding is necessary to have an international certification (like DHV or AFNOR) or an internal / national certification (Romanian Airclub). Also, for equipment that is used for climbing is necessary to have certified equipment. For some activities there is no required a certification (e.g.: rafting, winter sports, hunting, fishing, ...)

B.7 Interviewees recommendations for promoting the area as an ecotourism destination

Interviewees were invited to offer recommendations for the promotion of their area as an ecotourism destination. A list of suggestions was presented to them (question 11), including:

- 1 Promotion of an integrated tourist product of the area;
- 2 Better co-operation with tour operators;
- 3 More information to customers of ecotourism;
- 4 Introduce certification of businesses and individuals involved in ecotourism;
- 5 Training offered to businesses and their staff on ecotourism labelling.

Interviewees were asked to recommend which of the above they believe are more significant for the promotion of their area as an ecotourism destination, considering the local circumstances, and offer their own suggestions. The results obtained were analysed and tabulated in the following table (Table 9).

Table 9 – Recommendations for the promotion of the area as an ecotourism destination

Recommendation	% of interviewees
1. Promotion of an integrated tourist product of the area	85
2. Better co-operation with tour operators	78
3. More information to customers of ecotourism	78
4. Introduce certification of businesses and individuals involved in ecotourism	75
5. Training offered to businesses and their staff on ecotourism labelling	78

PART C – CONCLUSIONS AND ITEMS FOR CONSIDERATION FOR THE ACTION PLANS

C.1 Conclusions - assessment of the need for and feasibility of introducing an ecotourism certification system in the pilot area

This report aimed to investigate, on the one hand, the ecotourism activities offered in North Carpathian Area and the potential of further expansion of the ecotourism product offered; and, on the other hand, assess the need for and the feasibility of introducing an ecotourism certification system (for selected activities) in the pilot region.

According to the discussion in part A, the natural and cultural resources of the pilot region are indisputably adequate for the promotion of the ecotourism activities in the North Carpathian Area. It is a general point of view that there is a growing demand for ecotourism activities in the area, especially for: accommodation in rural area, hiking tours, cultural routes, winter sports, flora and fauna watching, participation in farmers / shepherds' life, fishing, bicycle tours and traditional crafts. Others ecotourism activities that could be developed in the area it possible to be: horseback riding, cave exploration, archaeological tours, mountaineering, rafting.

C.2 Items for consideration for the preparation of the action plans

Based on the findings from this report a better understanding of the ecotourism market in the target area has been gained. According to the ECO-ROUTE proposal, the national reports on the surveys conducted in each participating region will be presented in the synthesis report. The synthesis report will sketch the guidelines for the production of action plans for ecotourism labelling in each pilot area, specifying the activities that can be included in the certification system and the targeted companies and/or individuals that need to receive training to that effect. In this section a provisional list of items for consideration for the preparation of the action plans is included.

The representative of the National Authority for Tourism said that they are studying the possibility to develop new legislation regarding the ecotourism in co-operation with other government representatives. Also, they recognised that the RENAR (Romanian Accreditation Association) it is possible to be the certification body at national level for ecotourism services, but, they are not prepared for this until now.

There is an initiative of the Romanian Ecotourism Association regarding the implementation of a system of accreditation for ecotourism activities. In this sense, we will cooperate with the association to have a better result.

The Swedish Ecotourism Association, using the conclusions and recommendations of the synthesis report, will provide an outline for the actions plans for each pilot area. The task force will be briefed in the findings of the reports of Work packages 2 and 3, will be presented with the guidelines for the preparation of the action plan and will be asked to actively contribute in its preparation. Hence, a training package leading to a recognised certification, in particular regarding skills and facilities related to ecotourism activities, can be put together focusing on the added value from the adoption and implementation of the ecotourism label. The following table presents a provisional timetable and the tasks that must be fulfilled for the preparation of the action plan in each participating region.

TIME PLAN

What	Who	When
National reports from the surveys of ecotourism activities and businesses in the pilot areas	HAS, CDIMM, Skogslandet, PRISMA	Early September 2004
Synthesis report	PRISMA	Early October 2004
Guidelines for the action plans for the training in ecotourism labelling	Swed. Ecotourism Ass.	End October 2004
Set up of local task forces	All partners	October 2004
Co-production with the local task force of each pilot area's action plan	HAS, CDIMM, Skogslandet, PRISMA, and local partners	November 2004
Finalisation of the training material	All partners	December 2004
Training delivery	Task forces with the assistance of local partners in each pilot area	January 2005

Thus, there is a strong feeling that the ECO-ROUTE training package will be very welcomed by the target beneficiaries in the participating countries and the feasibility of introducing a European ecotourism label can be evaluated from its pilot run.

SWOT analysis of the Eco-tourism sector

Strength	Opportunities
<ul style="list-style-type: none"> rich natural and cultural heritage non-governmental organisations that try to keep alive local traditions there are protected areas with rich flora and fauna the target area is one of the well known destination for ecotourism 	<ul style="list-style-type: none"> important tourist potential the increasing demand for ecotourism activities initiate labelling certification in ecotourism offer specific services for customers the interest of the National Authority for Tourism to establish a legal framework for ecotourism activities the increasing of the interest of tourists operators to participate in training courses
Weaknesses	Threats
<ul style="list-style-type: none"> infrastructure is not so developed lack of promotion quality of the services are not very good lack of direct programme to support the ecotourism development the Regional Development Agency activity is oriented now only for mass tourism development 	<ul style="list-style-type: none"> there is a trend to replace the traditional houses with the new one that not respect the local architecture there is a risk to disappear the traditional arts there is no co-operation between tourist operators at local level to develop the ecotourism the institutional system is under reorganization

Annex

Questionnaire Survey of ecotourism activities in demand in the pilot area and the businesses involved in their delivery

Name.....

We take this opportunity to assure you that all responses are strictly confidential. The outcome of this survey will enable the ECO-ROUTE project partners to specify the activities and criteria for an ecotourism certification system so that tourism development of your area can be better planned.

1. How is your business involved in tourism?

- Accommodation provider
- Tour operator
- Organiser of ecotourism or other activities related to alternative forms of tourism
- Other (*please specify*)
-

2. What are the activities of your business?

.....

3. From the list of ecotourism activities below please mark those you are organising or to which you are offering support for your customers?

- Flora and/or fauna watching
- Cave exploration
- Bicycle tours
- Sailing
- Participation in farmers/shepherds' life
- Canoeing
- Kayaking
- Fishing
- Hunting
- Horseback riding
- Winter sports
- Hiking tours
- Mountaineering
- Rafting
- Sea sports
- Diving

- Hand gliding
- Ballooning
- Archaeological routes
- Cultural routes
- Ecotourism for disabled
- Painting, traditional craft, survival etc courses
- Other (*Please specify*)

3a. In what way do you offer support to your customers for the above activities?

- Organising excursions
- Providing equipment
- Providing guide
- Training
- Other (*Please specify*)

4. In your region, is there demand for ecotourism activities?

.....
Which ones?

5. Is there satisfactory infrastructure and service provision for the development of this type of activities?

.....
From whom?

6. Would you be interested in expanding your business to support (other) ecotourism activities?

.....

7. The activities you offer or support, are targeted to local or foreign markets, or both?

- Mainly to local markets
- Mainly to foreign markets
- To both equally

8. Are there qualified guides in your region for ecotourism activities?

.....

9. Do you know if there is any certification of ecotourism activities with respect to:

- Skills and jobs
- Facilities (eg. accommodation)
- Equipment

Please specify,

10. Which of the following criteria for ecotourism labelling do you consider more important (1 – very important, 2 – not so important?)

- | | 1 | 2 |
|---|--------------------------|--------------------------|
| 1. Respect nature and culture of the area | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Support the local economy | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Make all business's operations environmentally sustainable | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Actively contribute to conservation of the natural environment | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Promote training of staff and the "spirit of exploration" | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Promote quality and safety in all ecotourism activities | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. Other (Please specify) | <input type="checkbox"/> | <input type="checkbox"/> |

11. In order to develop your area as an ecotourism destination which of the following do you consider more important?

- | | |
|---|--------------------------|
| 1. Promotion of an integrated tourist product of the area | <input type="checkbox"/> |
| 2. Better cooperation with tour operators | <input type="checkbox"/> |
| 3. More information to customers of ecotourism | <input type="checkbox"/> |
| 4. Introduce certification of businesses and individuals involved in ecotourism | <input type="checkbox"/> |
| 5. Training offered to businesses and their staff on ecotourism labelling | <input type="checkbox"/> |
| Other (Please specify) | <input type="checkbox"/> |

12. Would you, or a member of your staff, be interested to participate in training courses in order to be certified in ecotourism?

- Yes
- No

13. Please, freely, write down any issues and comments regarding the promotion of ecotourism in your area.

DETAILS OF BUSINESS

1a. Do you employ staff in your business?

Yes

No

1b. How many?

2. The operation of your business is:

	From	Until
Seasonal		
Throughout the year		

3. Do you participate in any professional or other collective representation body (NGO)?

Yes *Please specify.....*

No

4. Do you use a PC in your business?

Yes

No

5. Do you advertise your activities in the Internet;

Yes

No

If yes, please specify (own website, advertisement in the region's website, etc).....