

# The Effects of European Integration in the Tourism Industry: Consequences of the Last Accession Waves



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**Abstract** Tourism is one of the sectors that have been favoured by the creation of the EU and each new country that acceded helped the Union increase its competitiveness in tourism. According to official statistics, the number of international inbound tourists in the New Member States of the EU increased, on average, three times and in many cases this is partly a consequence of the European Union accession and market oriented policies. However, most of the tourists travelling in Europe choose Western destinations, as they are not aware of the New Member States' tourism potential or have a wrong perception about these countries. Moreover, considerable research has been devoted to tourism in Western Europe, while rather less attention has been paid the New Member States. With these in mind, this chapter provides an examination of tourism in the New Member States of the European Union in the context of European integration.

**The key points of the chapter are the following ones:**

1. to discuss the main EU policies in the tourism industry
2. to analyse the New European Union Member States evolution in tourism
3. to highlight the effects of European integration for the tourism industry in Europe
4. to identify the main future challenges for the tourism industry in the EU

## 1 Introduction

The history of European integration illustrates the objective to create a political, monetary and economic union. Nowadays Europe benefits from European integration on various levels, one of the domains with most remarkable gains being trade of services. In this respect, tourism is one of the service industries that was highly affected by the evolution of the integration process. In the last decade new waves of

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economic integration took place in Europe (2004, 2007, 2013), enlarging the economic space towards the Central and Eastern part of Europe. Consequences have been manifested for the tourism activity, at the whole region level, as well as at sub-regional and country levels. Furthermore, an industry able to improve socio-economic welfare, tourism has been used as a reliable tool to accomplish the ultimate goal of integration and cohesion.

In this context this chapter envisages to study the impact of European integration for the tourism industry in Europe with emphasis on the last accession waves. In order to reach this objective, the chapter will be structured as follows: it will start with a presentation of European policies and EC directives designated to the tourism industry, as maintaining the upward trends in tourism has become one of the top priorities for the European Commission in cooperation with Member States and the European Parliament, in the light of forecasts estimating that Europe's market share decreases by 2030 in favour of Asia and the Pacific region (Debyser 2014). The chapter continues with an analysis of the evolution of the tourism activity in the European Union, research that has a double character: a comparative one by posing face to face Old Member States with New Member States and a longitudinal one, as time series data is analysed in order to identify trends in the tourism industry and to characterize the impact of European integration on this service activity. Data such as EU arrivals and overnight stays, imports and exports in the EU in travel are looked at in order to characterize the evolution of tourism at regional level, but also at country level. As a particular case study Romania is studied more in depth. Therefore, the main research questions the chapter tries to answer are: What impact did the European accessions have on the tourism industry in the New Member States? How European policies in tourism affect the sector? Which countries performed best in the EU in the period 2007–2015 from the tourism sector perspective and what trends could be identified? How did European Union tourist flows evolve in the context of the European integration and new EU accession waves?

## **2 EU Policies Regarding Tourism and the Context in the EU Documents**

Despite the fact that European legal basis for the tourism sector is still evolving, the European Institutions have recently started to focus on the tourism sector, as according to the World Tourism Organization (UNWTO Annual Report 2015, 2016b) the European Union is currently the largest tourist region in the world, accounting for 40.3% of the total international tourist arrivals and 29.6% of international tourism receipts in local currencies (Europe's market share in international arrivals is 51.2% and 35.8% for international receipts). Analysing the European tourism, the most relevant features that seem to depict and influence the actions to be taken in this industry are: it is a very fragmented sector, dominated

by the private sector and more accurately by family-owned SMEs, it is highly diversified and there are rare cases of cohesion and coordination, it is intensively segmented and quite sensitive to seasonality, and last, but not least, there is an increasing interest for nature friendly tourism, as tourists have become more environmentally aware (Bâc 2012). The importance of tourism for European integration was acknowledged for the first time on 10 April 1984, when the Council invited the Commission to make proposals on this sector (European Parliament 2004), with the purpose of improving the Internal Market. Even though only broad guidelines, norms and strategies were approached then, the resolution was important because it brought into Member States' attention the idea of a tourism policy, it at least recognised tourism as an action per se and made it an additional tool meant to serve the purpose of European integration (Morata 2002). It was not until the Maastricht Treaty in 1992 (also known as the Treaty on European Union) that "tourism" appeared for the first time in a legislative Act, namely the 3rd Article of the Treaty of Maastricht, which was dealing with "measures in the sphere of energy, civil protection and tourism" (General Secretariat of the European Council and the Commission 1992, p. 13). Only limited really integrative developments took place afterwards, as the industry was only pointed as one among the others.

Albeit, not even the Treaty of Lisbon (2007) recognised "tourism as a stand-alone policy" (Debyser 2014, p. 3), but there were at least taken measures meant to help decision-making process run faster and easier. The new section for tourism was introduced under the Article 195 of the Lisbon Treaty (Title XXII) and aims to promote a competitive tourist sector, creating a favourable environment and exchanging good practices.

Starting 2001, there has been a series of policy initiatives published in Commission Communications, which set various objectives and priorities for tourism at EU level. These worked as guidelines for the development of the tourism sector.

European Union has to face quite a lot of challenges in tourism, as for example to remain competitive in the world since forecasts predict downturns by 2030, to be able to adapt the tourism products to new tourist preferences and purchasing behaviour, but also to the demographic changes (apparently, the elderly population, people over 65, will reach 20% of the total EU population by 2020) or to the ever-changing information and communication technologies (European Commission 2010a, p. 9). Political, social and environmental security, as well as socio-cultural sustainability and safety of food and accommodation are also mentioned among the main challenges for tourism in the European Union (Bâc 2012), together with seasonality, taxation and regulations in the tourism sector, administrative burdens or difficulty of finding and retaining skilled staff (Fouloy 2015).

In order to cope with all the challenges, the European Commission designed a new framework called "Europe, the world's No. 1 tourist destination – a new political framework for tourism in Europe", in line with the aims provided by the Lisbon Strategy, "which foresees a new competence for the EU in the tourism field, changes the institutional context for the European tourism and offers the opportunity for a political initiative from the Commission in the field of tourism" (DG ENTR – Tourism Unit 2010). This new policy set four main priorities: "to stimulate competitiveness in the European tourism sector, to promote the development of sustainable,

responsible, and high-quality tourism, to consolidate Europe's image as a collection of sustainable, high-quality destinations, to maximise the potential of EU financial policies for developing tourism" (European Commission 2010b, p. 7). In line with the goals of the Europe 2020 Strategy, this policy was adopted by the European Parliament in September 2011. The other European Institutions were also asked to develop and encourage specific tourism programmes, emphasizing the need to support the micro, small and medium sized enterprises (SMEs). Additionally, the European Parliament highlighted the importance of high-quality tourism and the regional quality branding, suggesting the Commission to work on developing agro-tourism, eco-tourism, gastro-tourism, but also cultural, historical, industrial and natural heritage within the EU. This new framework actually represents a continuation of the ideas, orientations and objectives set by the 2007 Agenda, while also reflecting the new status of tourism industry, as it was specified in the Lisbon Treaty.

Various initiatives have been designed to promote European tourism in low seasons and tourism from emerging countries, focusing on regions such as South America, India or China as target markets. Furthermore, in November 2012, a Communication on "Implementation and development of the common visa policy to spur growth in the EU" was published, seeking not only to increase the number of tourists from countries outside the European Union but also to "make it easier for EU citizens to be joined by their non-EU family members and travel within the EU" (European Commission 2012a, p. 4). Consequently, Schengen Area's rules and regulations have been eased, in order to facilitate tourists flows, as according to a European Tour Operators Association report, "21% of potential tourists from emerging markets (outside of Europe) abandon their plans to travel to Europe due to slow processing of visas" (Debyser 2014, p. 6).

The Cohesion policy is another instrument that supports the Travel and Tourism industry, but this rather focuses on less developed European regions and countries, in order to help them catch up with the other EU members, so that the economic, social and territorial discrepancies to be reduced as much as possible. A set of European Principles for Quality Tourism was also developed and put in place by the service-providers that wanted to promote themselves by providing a quality guarantee. These principles cover four areas, namely Human Resources training, cleaning and maintenance, information availability and consumer satisfaction policy.

Among the most important projects and initiatives that have taken place lately are the following:

- "EDEN", European Destinations of Excellence, a project launched in 2006, which aims to develop models across the EU, disseminate "best practice", while promoting sustainable tourism. There are annual national competitions and a "destination of excellence" is chosen for each participant country, all the winning destinations being then promoted as a European brand. The visibility for emerging, non-traditional European areas is greatly increased by this initiative and, furthermore, "through the selection and promotion of destinations, EDEN effectively achieves the objective of drawing attention to the values, diversity and common features of European tourist destinations" (European

Commission 2016). Since its launch in 2007 EDEN has become a successful European initiative which led to the selection of 140 destinations of excellence and the establishment of the EDEN Network. Thanks to the EDEN award, promotional and networking activities, multiple benefits have been witnessed by local economy, stakeholders and visitors of the EDEN destinations. The impact of the initiative is measured not only in terms of increased profile of the destinations or tourist flows, but also in regards to development and increased activity directly motivated by the award. The funds for this program expired in 2011, but the Commission launched a new initiative—the Competitiveness of Enterprises and Small and Medium-sized Enterprises (COSME)—, based on the same principles, which enabled the parties involved to achieve the initial pilot project’s main objectives. The Commission has contributed (mostly financing-wise) to the development of cultural routes meant to help tourists both European and non-European citizens to discover European heritage and how people in Europe have lived since ancestry. For instance, a route of astronomical sites has been created in Greece, Spain, Portugal, Italy and Bulgaria, with the aim of creating a tour package within the countries mentioned, to attract new visitors with an interest in astronomy and strengthen existing partnerships. This project cost approximately EUR 200,000 and 75% was covered by EU funds from the COSME program.

- Calypso—“tourism for all”—, a 3-year action launched in 2009 that promoted social tourism, targeting seniors, youths aged 18–30, people with disabilities and families on low incomes. The project also encouraged low-season holidays and attractively priced tourism intra-EU packages (European Commission DG Enterprise and Industry 2011). Under this initiative, with a budget of 1 million Euro, the Commission funded 10 bilateral or multilateral projects, that focused on exchange models while supporting travel among the travel groups. These lead to the creation of the B2B eCalypso platform that is currently a place of reference for the whole community of European social tourism stakeholders.
- “Cycling Routes” took place from 2009 to 2011, period in which the European Commission awarded various grants to projects supporting the development and promotion of cycling routes across Europe—EuroVelo routes (European Commission 2012b). 15 cross-border routes were already implemented and it is expected that the entire network will be completed by 2020 and will total over 70,000 km. These cycle routes connect the whole Europe and comprise 42 countries, combining European history, culture and sustainable tourism. EU contributed EUR 2 million from the COSME program for the development of this initiative.
- “50,000 Tourists” Initiative launched by the European Commission in 2011, which aimed at increasing tourist exchanges between the EU and South America, encouraging collaboration mainly between governments and airlines. 25,000 Argentinians, Brazilians or Chileans were supposed to come to the EU from October 2012 until March 2013, while 25,000 EU residents to travel to Argentina, Brazil or Chile during May 2013–October 2013 (Almendros 2013). The European Commission has played the role of facilitator and coordinator and has

particularly invested in communication activities. Over 170 packages have been created by the European partners and several airlines and other partners took part in promoting the project. The majority of these itineraries included tours of two European countries or more. Duration was ranging from under 1 week to over 2 weeks. These proposals were grouped under the following themes: Cultural and Historic heritage, Natural heritage, Religious tours, Food and wine, and Educational—Language courses. According to the European Commission (2016), the uptake of this project was not entirely satisfactory particularly due to the lack of commitment from the South American Countries. Also in terms of quantitative assessment some difficulties were found in monitoring and reporting on bookings. Despite general incremental booking volumes, figures did not show if the bookings related directly to the “50,000 project” or to the packages offered under the project but rather referred to general tourism flows from South America. Some partners have been unable to provide data on bookings due to commercial sensitivity, to the cost of setting up a specific monitoring mechanism, or simply due to the lack of a direct link of bookings with the project. The lessons learned from this project are, however, still used to design possible cooperation activities with those countries and others as well.

All the initiatives mentioned did not have, however, a significant importance to the tourism sector, as their budgets were not that large and a rather few number of regions were involved. Yet, it can be stated that European Institutions (especially the Directorate General “Enterprise and Industry” within the European Commission) struggle to maintain and improve European Union’s attractiveness as a touristic destination, being increasingly aware of the importance of tourism for the economy as a whole.

In conclusion, cooperation among Member States themselves, but also between these and the European Union bodies can still be improved. There is currently no genuine tourism policy, but rather a set of actions at national level, a meta-policy, and this is perceived as one of the main weaknesses of the EU tourism industry (Halkier, *EU and Tourism Development: Bark or Bite*, 2010). EU bodies gives guidelines, develops pilot models and methodologies designed to be effective on a EU-scale, to assist the policymakers, the designed bodies at national and sub-national level and then call for proposals are published. EU tourism policy remains to a large extent an issue of national institutions. Furthermore, it is influenced by various sectorial policies, for example regional development, environmental, agriculture or enterprise, and impacts other EU policies as well, such as visas, education and culture, maritime and fisheries or rural development. It can therefore be stated that the grand theory of European integration, the neo-functionalism, is valid for the tourism sector and that this sector is a useful means to social and economic cohesion, regional development, and European territorial cooperation. This idea is also supported by Halkier (*EU and Tourism Development: Bark or Bite*, 2010, p. 93), who states that “tourism is still a rather low-profile area of EU activity in terms of grand statements and dedicated policy programmes, but that at the same time adjoining policy areas with extensive European regulation or intervention have had major impacts on tourism-related

developments". Main pillars of a common EU policy in the tourism field may aim for an improvement in quality of services, improved border formalities, a higher care for protection against the bankruptcy of small tour operators, better environment protection and increased corporate social responsibility, and last, but not least, diversified micro marketing strategies (Chindris-Văsioiu and Tocan 2014).

The following sections look at how the European integration and as part of it EU tourism policies and actions affected the tourism sector in the New Member States, integrated after 2004.

### 3 Context and Methodology

As per the latest reports from UNWTO (UNWTO Annual Report 2015, 2016b), international tourist arrivals worldwide hit its peak in 2015, with 1184 million overnight visitors, more than half of them being accredited to Europe, which reached a total of 609 million arrivals, 27 million more than in the previous year. As far as the international tourism receipts are concerned, Europe saw the largest increase in absolute terms, also accounting for 41% of worldwide international tourism receipts (the indicator refers to expenditures undertaken by international inbound visitors, including payments for international transport). These boosts can be to some extent explained by the exchange rates shock, the dollar's strength versus most European currencies. Chinese and Americans, the top spenders in international tourism were and still are more likely to take into consideration visiting Europe, whilst Europeans have been less interested in leaving the continent. Of the whole Europe, roughly 80% of the total arrivals in 2015 were reported within the European Union, out of which approximately 15% can be attributed to the New Member States of the European Union (NMS-13).

The New Member States of the European Union are considered to be the states included in the last three waves of accession. These are, in chronological order, the following: Malta, Cyprus, Estonia, Latvia, Lithuania, Poland, Czech Republic, Slovakia, Slovenia, Hungary (2004), Bulgaria, Romania (2007) and Croatia (2013).

The main source of information for the present study was Eurostat database, from which indicators have been extracted and analysed. In order to evaluate the effects of European integration in the tourism industry, most specifically the consequences of the last accession waves, the following indicators were considered to be the most relevant:

- Number of arrivals and overnight stays, which refer to EU-28 visitors entering the economic area of the countries taken into consideration. Data for number of arrivals include tourists and same-day non-resident visitors, while the overnight stays correspond to the number of nights spent by guests, non-resident tourists in all kinds of accommodation establishments. The arrivals of same-day visitors spending only a few hours during the day (no overnight stay, the date of arrival and departure are the same) at the establishment are excluded when measuring the overnight stays. Data comprises the overnights spent in hotels, holiday and

other short-stay accommodation, camping grounds, recreational vehicle parks and trailer parks (World Tourism Organization 2016a). Furthermore, the number of arrivals or trips and the number of visitors is different, as a person can make several trips to a country during a given period and this is counted each time as a new arrival. Thus, the data on incoming tourists refer to the number of arrivals, not to the number of people traveling.

- International transactions—imports and exports—Exports refer to all the goods and services tourists consume while abroad. Tourism imports are represented by the expenses tourists undertake while travelling abroad. Incoming tourists represent tourism exports, and outgoing tourists represent tourism imports.

The selection of these indicators has been made after reviewing existing research papers related to this topic and based on availability of data, considering that statistical databases are not always up-to-date or complete, especially in the developing countries. The number of arrivals and the overnight stays, are a good reflection of a destination popularity, of tourism performance and impacts, exports and imports in travel may be a sign of economic development, while clearly reflecting changing trends in destination preferences, as well as the influence of exchange rates fluctuations (Dupeyras and MacCallum 2013). The impact of European integration on tourism will be sketched analysing data longitudinally, time series serving the purpose of identifying general trends. Furthermore, a comparison between Old Member States (OMS) of the European Union and New Member States of the European Union is conducted. Data was collected mainly from Eurostat, and the missing information was filled with figures and statistics from the World Tourism Organization. Statistical analysis is the main quantitative research method used and the qualitative review of the statistics gathered together with case studies, historical research and observations proved suitable complements to our endeavour.

## 4 Main Statistical Findings

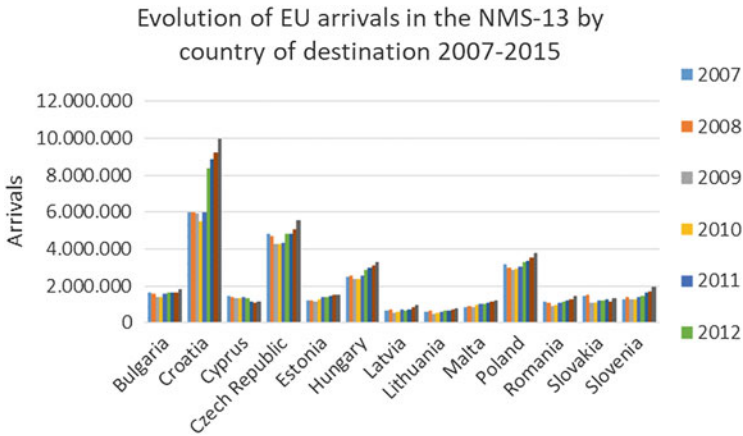
This section analyses the tourism statistical indicators presented previously and the way they evolved in time mainly for New Member States. Some general level comparisons are also conducted between Old Member States and New Member States.

### 4.1 *EU Arrivals and Overnight Stays*

Compared to 2007, the number of arrivals in the European Union coming from the whole Europe in 2015 rose by 18%, from approximately 708 million to roughly 880 million persons.

Figure 1 illustrates year-by-year the NMS-13 countries evolution of EU arrivals and overnight stays from 2007 to 2015. Most of the countries saw their numbers increasing in terms of EU arrivals, indicating that the EU accession contributed to





**Fig. 1** EU arrivals evolution by country of destination 2007–2015 (Source: Authors’ conception—based on data from Eurostat)

the tourism industry in the area considered. The most impressive rise was reported by Croatia, where the number of non-resident tourists in 2015 went up by 67% compared to 2007. The only countries that faced decreases were Cyprus, down 18% and Slovakia, 6% less tourists. European Union citizens, members of the Old Member States, the main importers of tourism from the New Member States, felt more secure and were more willing to visit the countries in the Central and Eastern Europe once these were declared eligible for the EU accession despite the previous negative perception about the countries in the area (Druvaskalne and Slara 2006). Most of the incoming tourists in the period 2007–2015 in the New Member States were from Italy, Spain, France, Germany and UK. The New Member States that received the highest number of tourists from the European Union from 2007 to 2015 were Croatia (~66 million arrivals), followed by Czech Republic (~43 million arrivals), Poland (~29 million arrivals) and Hungary (~25 million arrivals).

At the same time, tourists originating from the New Member States started to travel more, mainly to neighbouring countries and regions. Among the New Member States countries, those who travelled the most to the EU in the period from 2007 to 2015 were the citizens of Poland—approximately 47 million tourist arrivals, Czech Republic—32 million, Romania—22 million and Hungary—20 million. In regards to the trips made to the NMS-13 area, the top looks as follows: Poland 14.1 million tourist arrivals, Czech Republic 12.2 million, Slovenia 9.4 million.

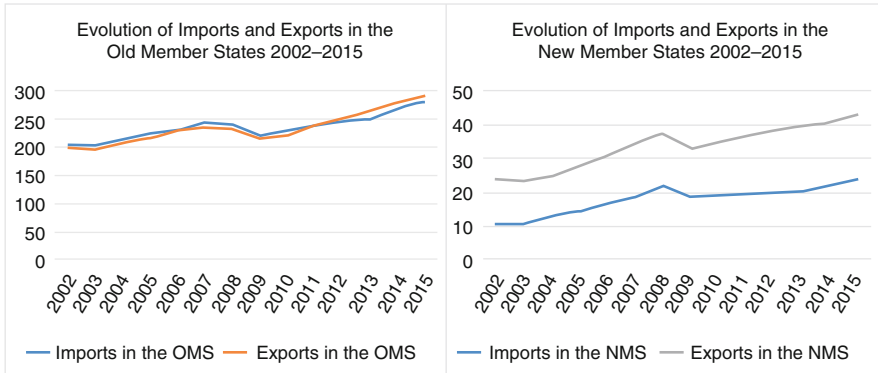
In what regards the number of overnight stays in the region, in 2007 EU residents made almost 1000 million trips for holiday purposes, out of which 24% abroad. 55% of them were trips of 1–3 nights, as city breaks started to gain popularity. The number of overnight stays is, as predicted, in a tight relation with the number of arrivals. The overnight stays from the EU-28 in the NMS-13 increased by 30% in 2015 compared to 2007. This might be explained by the fact that Central and

Eastern Europe (CEE) was a new, unexplored and unknown region for many European Union citizens. This supposition was confirmed by a study made by the European Commission (2003) when it was revealed that 75% of all EU citizens did not travel outside the European Union borders. Considering that none of the New Member States were part of the European Union in 2003, the EU accession can be seen as one of the main motivating triggers for the increasing number of intra-EU overnight stays and intra-EU tourist arrivals. Additionally, changes in transportation markets, faster border crossing procedures (European Commission 2011), and the tourism policies strengthening contributed to the significant increase in incoming tourism in the NMS-13. According to Eurostat statistics (2016), the capital cities of the New Member States were the most popular attractions for the EU citizens and, over the whole period, tourism in most of the countries considered had a strong seasonality component, taking place during summer.

#### ***4.2 International Transactions in Travel: Imports and Exports in the EU***

When it comes to international transactions in travel, we looked at imports and exports, as these allow for a deeper understanding of tourism evolution in the context of EU enlargement waves, representing tourists' expenses for travel purposes. For both exports and imports increases were reported over the 2002–2015 period, indicating that the integration took place and was significant enough to influence the general trends in travel.

Among the Old Member States, the countries that influence the most the net balance in travel are Germany and Spain. Germany is a categorical net importer of tourism (German citizens are the ones who travel the most among the EU Member States), while Spain is the biggest net exporter in the EU-28 (Spain is the most visited country in the EU). As far as the New Member States are concerned, the only one that over the years remained a net importer of tourism is Romania, while the country with the largest number of incoming tourists and the biggest net exporter of tourism is Croatia. Looking at absolute figures, the top countries from the Old Member States in terms of exports are Spain France, Italy and UK. The New Member States that stand out from the amount of exports point of view are Poland, Croatia, Czech Republic and Hungary. Starting with 2004 (until 2009) when most of the New Member States entered the EU, the exports in travel in the Central and Eastern Europe significantly increased. It looks like most of the overnight stays in the EU were reported by Germany, UK, Italy, Belgium France, Austria, Czech Republic, the Netherlands and Poland. In 2015 exports in travel in the New Member States were 82% larger than in 2002, while for the Old Member States these went up by only approximately 47%. In absolute terms, exports in the NMS-13 in 2015 were in amount of 42.9 thousand million and in the OMS-15 almost seven times higher,



**Fig. 2** Evolution of imports and exports in NMS and OMS 2002–2015 (Source: Authors’ conception—based on data from Eurostat)

292.1 thousand million. The travel imports reported by the NMS-13 doubled in 2015 compared to 2002, while in the OMS the number of residents that went abroad and spent money there as tourists rose by only 37%. The difference can be explained by the fact that the openness of Western European countries to Eastern European countries coupled with curiosity and eagerness to visit, acted as a strong trigger for people from Central and Eastern Europe to visit Western Europe, while the prolonged unfavourable image that people in countries from Western Europe had about Central and Eastern European countries act as a break factor for those. Among the NMS-13, the countries that imported travel services the most by acquiring accommodation, food and beverage services, souvenirs and any other processed goods, as well as internal transportation services (international transportation is calculated separately) were Poland and Czech Republic, the countries with some of the highest standards of living and average wages in the NMS (together they summed up half of the imports in the entire CEE region), while from the OMS-15 three of the countries, namely Germany, UK and Spain accounted for 50% of the entire amount of imports.

The New Member States experienced a more accelerated growth in terms of imports compared to the Old Member States, where an unsteady tendency can be observed throughout the time period analysed. This can definitely be attributed to the EU accession from the NMS perspective, as border crossing procedures were eased, the idea of a European identity became more popular among youth, the desire and openness for travel increased and GDP improved (approximately 12% gain in the GDP per capita in Central Eastern Europe seemed to be directly related to being part of EU—Campos et al. 2014). Figure 2 exhibits best the information presented above. In order to make it easier for the reader to find the information and

**Table 1** Imports in travel EU-28 2002–2015 (in 1000 million EUR)

	2007	2008	2009	2010	2011	2012	2013	2014	2015
Belgium	12.8	13.4	13.1	14.3	14.8	15.7	16.4	17.9	17.1
Denmark	6.5	6.6	6.5	6.8	7.2	7.5	7.6	7.9	8
Germany	60.6	61.9	58.2	58.9	61.7	64.9	64.7	70.2	69.9
Ireland	6.3	7	5.6	5.4	4.8	4.6	4.6	4.8	5.1
Greece	2.5	2.7	2.4	2.2	2.3	1.8	1.8	2.1	2
Spain	14.4	13.8	12.1	12.7	12.3	11.9	12.2	13.6	15.7
France	27.9	27.9	27.5	29.2	32.3	30.4	31.9	36.7	34.6
Italy	19.9	20.9	20	20.4	20.6	20.5	20.3	21.7	22
Luxembourg	2.5	2.6	2.6	2.7	2.7	2.8	2.9	2.9	3
Netherlands	13.9	14.8	14.8	14.8	14.7	15.7	15.4	15.4	15.8
Austria	7.7	7.7	7.7	7.7	7.5	7.8	7.7	8.1	8.2
Portugal	2.9	2.9	2.7	3	3	2.9	3.1	3.3	3.6
Finland	2.9	3.1	3.1	3.3	3.5	3.8	4	4	4.3
Sweden	9.1	9.2	8.1	9.2	10.1	10.9	11.6	11.9	13
United Kingdom	52.2	46.8	36.1	37.7	40.7	44.5	44	47.7	57.1
OMS total	242.1	241.3	220.5	228.3	238.2	245.7	248.2	268.2	279.4
% change	5	0	−9	4	4	3	1	8	4
Bulgaria	1.3	1.6	1.3	0.9	1	1	1.2	1.4	1.5
Croatia	0.7	0.8	0.7	0.6	0.6	0.7	0.7	0.6	0.7
Cyprus	1.1	1.1	0.9	0.8	0.9	1	0.9	1	1
Czech Republic	2.6	3.2	2.9	3.1	3.3	3.3	3.5	3.9	4.4
Estonia	0.5	0.6	0.4	0.5	0.6	0.6	0.7	0.9	0.9
Hungary	1.9	2.2	2	1.8	1.8	1.5	1.4	1.5	1.7
Latvia	0.7	0.8	0.6	0.5	0.5	0.5	0.5	0.5	0.6
Lithuania	0.8	1	0.8	0.6	0.6	0.7	0.8	0.8	0.9
Malta	0.2	0.2	0.2	0.2	0.2	0.3	0.3	0.3	0.3
Poland	5.7	6.6	5.2	6.5	6.1	6.8	6.7	6.7	7.2
Romania	1.1	1.5	1	1.2	1.4	1.4	1.5	1.8	1.9
Slovakia	1.1	1.5	1.5	1.5	1.6	1.7	1.8	1.8	1.9
Slovenia	0.8	0.9	0.9	0.9	0.8	0.7	0.7	0.7	0.8
NMS total	18.5	22	18.4	19.1	19.4	20.2	20.7	21.9	23.8
% change	10	19	−16	4	2	4	2	6	9
Imports total	260.6	263.3	238.9	247.4	257.6	265.9	268.9	290.1	303.2

Source: Authors' conception—based on data from Eurostat

understand the facts presented, we gathered all the data regarding imports in EU-28 in Table 1 and exports in EU-28 in Table 2.

In order to identify which countries the residents of the New Member States preferred and where the tourists in the New Member States were coming from, we looked at the number of overnight stays and arrivals by both country of destinations

**Table 2** Exports in travel EU-28 2002–2015 (in 1000 million EUR)

	2007	2008	2009	2010	2011	2012	2013	2014	2015
Austria	13.6	14.7	13.9	14	14.3	14.7	15.2	15.7	16.4
Belgium	8	8	8.5	8.6	9.1	9.7	10.1	10.5	10.8
Denmark	4.4	4.3	4	4.4	4.9	5.1	5.4	5.7	6
Finland	2.1	2.2	2	2.3	2.7	3	3	2.8	2.3
France	39.6	38.5	35.5	35.5	39.3	41.8	42.6	43.8	41.4
Germany	26.3	27.1	24.8	26.2	27.9	29.7	31.1	32.6	33.3
Greece	11.3	11.6	10.4	9.6	10.5	10.4	12.2	13.4	14.1
Ireland	4.4	4.3	3.6	3.1	3	3	3.4	3.7	4.3
Italy	31.1	31.1	28.9	29.3	30.9	32.1	33.1	34.2	35.6
Luxembourg	2.9	3	3	3.1	3.5	3.9	3.9	4.1	3.9
Netherlands	9.7	9.1	8.9	9.6	9.7	9.7	9.7	9.8	10.4
Portugal	7.4	7.4	6.9	7.6	8.1	8.6	9.3	10.4	11.5
Spain	42.1	41.9	38.1	39.6	43	43.5	45.5	49	50.9
Sweden	4.4	4.3	4	4.4	4.9	5.1	8.1	8.9	10.2
United Kingdom	28.2	24.6	21.7	24.4	25.7	29.1	31.5	35.2	41
OMS total	235.5	232.1	214.2	221.7	237.5	249.4	264.1	279.8	292.1
% change	3	−1	−8	4	7	5	6	6	4
Bulgaria	2.6	2.9	2.7	2.7	2.9	2.9	2.9	2.9	2.8
Croatia	6.7	7.4	6.4	6.2	6.6	6.8	7.2	7.4	7.9
Cyprus	2	1.9	1.6	1.6	1.8	2	2.2	2.1	2.2
Czech Republic	5	5.3	5	5.4	5.5	5.5	5.3	5.2	5.5
Estonia	0.8	0.8	0.8	0.8	0.9	1	1.2	1.4	1.3
Hungary	3.4	4.1	4.1	4.3	4.2	3.9	4	4.4	4.8
Latvia	0.5	0.5	0.5	0.5	0.5	0.6	0.7	0.7	0.8
Lithuania	0.8	0.8	0.7	0.7	0.9	1	1	1	1
Malta	0.7	0.7	0.6	0.8	0.9	1	1.1	1.1	1.2
Poland	7.7	8	6.4	7.2	7.6	8.5	8.6	8.9	9.5
Romania	1.2	1.4	0.9	0.9	1	1.1	1.2	1.4	1.5
Slovakia	1.7	1.8	1.8	1.9	2	2.1	1.9	1.9	2.1
Slovenia	1.5	1.8	1.7	1.9	2	2	2	2.1	2.3
NMS total	34.6	37.4	33.2	34.9	36.8	38.4	39.3	40.5	42.9
% change	13	8	−11	5	5	4	2	3	6
Exports total	270.1	269.5	247.4	256.6	274.3	287.8	303.4	320.3	335

Source: Authors' conception—based on data from Eurostat

and country of origin. Data on how much the tourists from each country spent in the country of destination is hardly available and will not be analysed. Only countries from the European Union were taken into consideration in this analysis. Table 3 summarizes the findings.

To sum up, in all EU destinations, the majority of arrivals originated from intra EU markets, the highest number of trips being made by residents of Germany, followed by France, UK, Italy and Spain. Concerning the New Member States, the

**Table 3** Preferred countries of destination and main sources of tourists for the NMS-13

NMS	Country of destination	Country of origin
Bulgaria	Greece	Germany
Czech Republic	Italy	Germany
Estonia	Finland	Finland
Croatia	Italy	Germany
Cyprus	Greece	UK
Latvia	UK	Germany
Lithuania	UK	Germany and Poland (approximately the same number of tourists)
Hungary	Italy and Austria (approximately the same number of tourists)	Germany
Malta	UK	UK
Poland	Italy	Germany
Romania	Italy	Germany and Italy (approximately the same number of tourists)
Slovenia	Croatia	Italy
Slovakia	Czech Republic	Czech Republic

Source: Authors' conception—based on data from Eurostat

residents of Poland, Czech Republic, Croatia, Hungary and Romania reported the largest number of trips. Furthermore, several trends have been identified. One of the most easily noticed tendency is that residents of the EU tend to travel most often to neighbourhood destinations, mainly as a consequence of geographical and cultural proximity. This can also be explained by the fact that approximately 15% of the total trips were for business purposes according to Eurostat, this number increasing yearly. Additionally, “sun, sand and sea” tourism is considered to be the main reason for travel in the EU, followed by visits to relatives, family or friends (European Commission 2015). During summer, there is a common practice among Europeans to travel to the seaside, spend time with their families and friends, and rest for maximum 2 weeks. In order to cut costs, Europeans prefer to rent an entire private home, share a car and travel to countries with friendly climate in their proximity, such as Greece, Croatia, Italy, Bulgaria, Spain or Romania. Transit accommodation can also be a reason for tourist from Eastern part of Europe (Bulgaria, Romania) travelling by road to the Western part of Europe.

To conclude, the impact of European integration for the tourism in the NMS was very visible with positive and increasing evolutions for tourism as depicted by all studied indicators: number of both incoming and outgoing tourist increased for these countries, as well as the value of international transactions in travel and the material base in the tourism industry. Factors such the growing use of Euro that encouraged travelers to go to the Euro zone countries without worrying about exchange rates (Akerhielm et al. 2003), deregulation of international air transport and the expansion of low-cost airlines, event particularly prevalent in Europe (Sharpley and Telfer 2015), increasing competition that enabled product offering innovation, the IT and its use in e-tourism (Weiermair 2003), the Europeans

increasing openness to tourism and especially to unique destinations or the availability of natural resources are considered to be among the important factors that contributed to the development of tourism in the New Member States area. On the other hand, Hudman and Jackson (2003, p. 25) consider that the most important factors influencing tourism are leisure time, affluence (the populations has gained a better standard of living), and mobility, idea supported also by Chindris-Văsioiu and Tocan (2014), who found that changing practices of work (more remote-based jobs, less full-time basis contracts) and increasing level of stress and pressure of time also influenced the number of trips taken by Europeans and the destinations they are choosing with the purpose to “escape” through holidays or to successfully combine work with rest.

## 5 Case Study: Romania

In this section Romania is more thoroughly looked at from the tourism industry evolution point of view, in an attempt to characterize in more detail, the EU accession’s effects.

On January 1, 2007 Romania, the 12th largest country in Europe (according to population) became a Member State of the European Union. Despite its natural beauties potential, Romania is still not a very popular tourist destination in Europe.

According to the official data from Eurostat, most of the incoming tourists in Romania are from Europe (approximately 90%), while 60.33% are EU residents. Germany, Italy, France, Hungary and Italy are the main sources of tourists for Romania, accounting for more than half of all tourist arrivals reported in Romania from 2007 to 2015. However, if we look at the number of persons and not the number of arrivals (the same person can visit Romania more times and will be counted each time), most of the tourists that entered Romania from 2007 to 2015 were from Hungary (15 million persons), Bulgaria (9.2 million persons), Germany (4 million persons), Italy (3.2 million persons) and Poland (2.4 million persons), these five countries accounting for 46% of the total number of international tourists that visited Romania during the timeframe considered, 50% of the total number of European tourists and 77% of the total number of EU-28 tourists. The fact that the largest number of incoming tourists are residents of Hungary and Bulgaria reinforces the idea that geographical and cultural proximity are among the most important factors that influence consumers buying behaviour. All data is presented in Table 4. For tourists from Hungary the visit of relatives and friends was also one main motivation for travelling to Romania, that has a minority of Hungarian nationality citizens.

According to INS (the Romanian National Institute for Statistics) data, in top preferences of the EU tourists, Bucharest and other major cities in Romania, among which Constanța, Timișoara, Cluj-Napoca and Brașov rank first, representing roughly 76% of the total number of EU residents that visited Romania from 2007 to 2015, most of them being business tourists. These cities are also the largest contributors to Romania’s GDP (Bucharest—20%, Constanța—11%, Timișoara 10.1% Cluj-Napoca

**Table 4** Number of tourists from EU in Romania 2007–2015

Continent and origin country for foreign tourists	Years								
	2007	2008	2009	2010	2011	2012	2013	2014	2015
	MU: thousands persons								
Total	7722	8862	7575	7498	7611	7937	8019	8442	9331
Europe	7289	8410	7203	7098	7180	7473	7526	7815	8678
European Union	4811	5566	4799	4456	4391	4673	4719	4996	5346
Austria	218	210	180	177	193	218	200	202	180
Belgium	43	44	37	42	50	47	48	55	47
Bulgaria	818	1115	877	786	797	944	1136	1209	1524
Croatia	:	:	:	:	:	:	12	22	22
Cyprus	13	11	8	8	10	9	7	9	7
Czech Republic	110	135	101	80	80	96	90	84	85
Denmark	18	17	13	11	14	14	12	15	12
Estonia	4	6	4	4	4	4	5	7	6
Finland	10	10	9	8	11	7	7	7	6
France	184	183	150	131	153	150	136	147	129
Germany	473	522	443	395	381	439	448	470	438
Greece	104	118	90	71	83	77	76	72	63
Hungary	1743	1950	1836	1735	1546	1547	1443	1495	1661
Ireland	14	15	11	10	13	13	11	17	14
Italy	398	433	375	331	352	340	332	355	324
Latvia	3	4	4	4	4	4	6	6	8
Lithuania	7	10	10	9	9	11	10	12	16
Luxemburg	2	1	1	1	1	1	1	2	2
Malta	1	1	1	2	2	3	2	3	2
Netherlands	79	80	67	66	78	76	71	78	65
Poland	191	277	223	238	250	301	300	308	355
Portugal	16	16	20	47	47	41	53	62	46
Slovakia republic	120	148	114	98	84	100	100	97	109
Slovenia	29	37	35	23	17	19	23	21	20
Spain	70	71	67	63	77	74	64	76	57
Sweden	25	24	19	24	26	25	22	25	26
United Kingdom	118	128	104	92	109	113	104	140	122

Source: Authors' conception—based on data from the Romania National Institute of Statistics

9.8%, Brasov 9.5%) and, according to Forbes Magazine (Panait 2015), the cities mentioned were in top cities for business in Romania in 2015. The mountains tourism in Romania is also of interest for the EU tourists, accounting for 7% of the total number of persons. This form of tourism together with city tourism are the only forms of tourism that experienced a continuous, yet steady growth in the period analysed. The arrivals attributed to balneo-tourism, sun, sea and sand tourism and even to the Danube Delta region fluctuated throughout the timeframe considered, and together they account for 5% of the total number of EU tourists. Most of the tourists from the



EU travel to Romania by car, followed by air transport, water transport and rail transport.

As far as the Romanian tourists' preferences are concerned, roughly 70% of them chose to travel within EU in the period 2007–2015, the numbers reported showing an ascendant trend with the sole exception of year 2009, when Romanian tourism was strongly hit by the financial crisis. 32% of the total number of outgoing tourists from Romania went from 2007 to 2015 to neighbouring countries, namely to Greece, Bulgaria and Austria. The proximity of the first two markets, Greece and Bulgaria, reachable by car, the main mean of transport Romanians choose for their holidays—77% according to the National Institute of Statistics Romania (2017) but also the relative low prices are the main explanations for this high proportion of Romania's travel imports (23%). Greek and Bulgarian sea coast, as well as Bulgarian and Austrian ski resorts are Romanians' prime holiday destinations and good examples of "best practices in tourism". Spain and Italy were also present in Romanians' top of choices, but in these countries a significant number of departures were for business purposes. Given the fact that there is a large number of Romanians working both in Italy and Spain visiting relatives and friends can be another motivation to visit these countries.

2007 reports show that tourism (both domestic and international) accounted for 4.8% of GDP and 5.8% of the jobs available in Romania (Blanke and Chiesa 2009). This industry was the second most important sector for Romania, after trade. By 2015, tourism industry increased its share to GDP, reporting a 5.1% total contribution to Romania's Gross Domestic Product that year. However, the official participation of tourism at the total jobs available decreased to 5.4% in 2015, as a large percentage of the employees have seasonal jobs and work without contracts (Iorga 2014).

Above all, the main advantage of Romania's accession to the EU has been the existence of European Structural and Cohesion funds, which have had a significant contribution in the process of developing tourism industry in Romania, mainly by providing the opportunity to increase tourism offerings and infrastructure, but also improve human resources skills and capabilities. Yet, free circulation of EU citizens has been another important factor that helped the tourism sector. In the first year after Romania's accession, the number of tourists from EU increased considerably, but afterwards started to fall at a steady pace. This slow decline could be linked to the economic crisis, considering that approximately 70% of the total number of international incoming tourists reported in 2007 were business-related (Niculescu 2008), while in 2009 business tourists represented roughly 55% of the total number of international arrivals according to the National Institute of Statistics. From 2010 on, when the crisis ameliorated, on the basis of European accession, business travel arrivals and receipts increased steadily, reaching 58% of the total number of international arrivals and 60% of the total receipts in 2015, surpassing all the other types of tourism, including leisure tourism, where the largest contribution (approximately 60%) is brought by tourists that come to Romania for shopping and clubbing (National Institute of Statistics 2016).

In what regards Romania's national tourism policy, according to the latest report Romania sent the European Commission (The National Authority for Tourism,

2016), the key missions in tourism refer to applying best practices identified in countries with well-developed tourism to the organization of the Local Tourist System (there are county tourist associations in various locations considered key-regions for Romanian tourism, such as Sibiu, Braşov, Prahova, Covasna, Harghita, Mureş, Constanţa or Bucovina), decentralising the authorising activity, align the Romanian touristic products and offerings to European and international level, trends and practices, and also promoting and capitalizing on agricultural, creative industries or IT products and services that are seen as competitive advantages of Romania. There are also several institutional cooperation that aim to boost domestic and international tourism, such as common programs for student camps in low seasons (in collaboration with the Ministry of Education), for the recovery of the skilled labour force in SPAs (with the Ministry of Health), for developing heritage tourism (with the Ministry of Culture), as well as initiatives meant to increase the number of pensioners who can receive tickets for appropriate SPAs and medical centers (with the Ministry of Labour, Family, Welfare and Seniors) or strategies for facilitating the visa procedure for tourists (in partnership with the Ministry of Foreign Affairs). Furthermore, several fiscal measures have been adopted in order to encourage the entrepreneurs in the tourism sector to invest in qualitative services and facilities—exemption for profit tax for 5 years for investments in spa services and for 3 years for any new investment in tourist facilities or the remission of tax on reinvested profit if the investments are meant to improve tourists facilities are some relevant examples. Given the increasing interest the European Union gives for sustainable tourism, Romania offers fiscal benefits for tourist accommodation establishments that obtain the eco label. Last, but not least, diversification of the tourism offer, protection of the cultural and natural heritage, improving the sustainability and quality of tourism offer, as well as developing responsible tourism practices are considered a priority for Romanian tourism sector, while connectivity and transport, bureaucracy, demographic and climate changes are indicated as having a low importance for the industry.

Romania attended all the EDEN (European Destinations of Excellence) editions and seven destinations have been designated as European Destinations of Excellence, namely: Horezu in 2008 (local intangible heritage and theme tourism), Apuseni Nature Park in 2009 (theme tourism and protected areas), Geoagiu-Băi in 2010 (theme aquatic tourism), Alba Iulia and Buzău Land in 2012 (regenerated physical sites and theme tourism for the first location and theme rural tourism for the second area mentioned), Jurilocva in 2013 (theme accessible tourism) and Mărginimea Sibiului in 2015 (theme tourism and local gastronomy).

Despite all these, the relatively slow improvements made by Romania in the tourism industry and the fact that business tourism represents such a large percent of the total international tourists in Romania may be explained by the rather low involvement of the Government in this industry, mainly in what regards financing related issues. Currently, in 2017, Romania does not have a Ministry of Tourism any longer, the National Authority for Tourism being the one currently representing Romania's interests in the tourism field, and, even though the turnover from tourism activities was roughly EUR 2 billion in 2015, the budget allocated by the

Government for tourism promotion in Romania was only 0.1%, meaning EUR 2 million according to the president of the National Authority for Tourism (Bădulescu 2017).

## 6 Conclusions and Main Future Challenges

European tourism industry was highly influenced by the European integration process and by the new waves of European accession. The main conclusions drawn based on the analysis conducted in the period 2007–2015 reflect the following:

- (a) As an overall trend tourism activity increased in the analysed period in both Old Member States and New Member States of EU, even though at different paces with the New Member States registering higher levels of increase for most of the studied indicators. These evolutions reflect on the one hand the fact that there was an initial gap between the two groups of countries with the Old Member States having more developed tourism industries and on the other hand the fact that the New Member States are catching up and try to fill in the existing gap benefiting of the opening of new markets and of EU support policies. Still most of the New Member States cannot really compete with the Old Member States due to lack of infrastructure, poorer marketing strategies, a smaller degree of international awareness concerning their countries' touristic potential. Therefore, they should focus on individual and unique tourism products and experiences, as a way towards tourism development. In both Old Member States and New Member States the tourism sector was affected during the economic crisis period, but both regions have recovered at present with moderately positive trends. It can be stated that European integration had a positive effect on the development of the tourism industry in Europe.
- (b) New Member States seem to have benefited from European Union accession and policies, as touristic markets have opened, the European Commission has been working together with the Parliament and the national authorities since 2007 to provide them guidance, to reduce their vulnerabilities, foster co-operation, increase competitiveness and raise awareness concerning the high touristic potential of this region. The New Member States benefited from the opening of the markets, from the willingness and curiosity of Western European citizens to explore new less accessible countries by then in spite of an existing unfavourable image about the region. The global existing tendency to explore non-traditional tourism destinations, destinations that are considered to be unique, exclusive, where tourists can interact with local people, observe their traditions and look for meaningful experiences, come in favour of the New Member States. Destinations such as Danube Delta, Maramures, Bucovina, Harghita or Prahova regions in Romania, colourful Nida in Lithuania, Dubrovnik, Split, Plitvice Lakes National Park, Mljet Island and Kotor in Croatia, Warsaw and Krakow in Poland, the cosmopolitan cornerstone of the Baltic

Countries—Riga, Latvia, Tallinn in Estonia, the Baroque beauty of Vilnius, Lithuania, Prague or Olomouc, the so-called “undiscovered gem” of the Czech Republic, Ljubljana and Lake Bled in Slovenia can be considered representative for the New Member States touristic potential, since tourists from the Old Member States are becoming more experienced, are no longer that interested in buying standard trips, but rather willing to immerse in local cultures. They therefore find grounds to fulfil these wishes in the New Member States tourism. In the context of the new EU accession waves, adventure tourism, community-based tourism, culinary tourism, agro-tourism or cultural and religious tourism are some of the segments that offer good opportunities for tourism.

- (c) As general tendencies in terms of behaviour of the European tourist it was noticed that:
- most of the European citizens prefer to travel to neighbouring countries as geographical proximity, probably higher cultural similarity and reasonable prices are good incentives for such choices
  - among the motivations to travel, business tourism accounts for a large proportion of the short stays in European Union. Also visiting relatives and friends that either live, study or work in another European country is another main motivation for foreign tourism in European Union.
  - among pure tourism motivations many tourists that travel abroad in European Union choose either seaside and sunshine or visiting cities, mainly the capital cities and historical cities.
- (d) The development of the tourism industry is unequal within both groups Old Member States and New Member States and the changes of the last years also differed highly among countries. Considering all the indicators reviewed, the New Member States that performed best from the tourism sector perspective in the period 2007–2015 were Croatia, Czech Republic, Poland, Hungary and Bulgaria. It was noticed that citizens of the richest countries in the region (Poland and Czech Republic) travel abroad the most. The countries among new Member States that attracted the most tourists are the ones situated in geographical proximity of the Central part of the continent and most economically developed (Poland and Czech Republic) and that offer seaside and sunshine (Croatia). Among the Old Member States, the ones whose citizens travel abroad the most are the most economically developed ones (Germany and United Kingdom), while the ones that attract the most tourists are the ones that constitute traditional touristic destinations for both sun and seaside and historical tourism (France, Spain, Italy) followed by Germany and United Kingdom as highly economically developed countries.
- (e) The factors that affected the evolution of tourism industry and the development of both incoming and outgoing tourism in New Member States are: the economic crisis, the EU integration, the diversification of tourism preferences of citizens in Old Member States, the easiness to travel from one side of the continent to the other in terms of free movement, the increasing standard of living in the New Member States and higher budgets designated to travelling

abroad, the increasing business activities between the two groups of countries with the business travel accounting for a good part of the inter-regional tourism, the increased usage of Euro as an unique currency in 19 of the EU-28 countries, changing social behavior and a general worldwide increasing preference for travel, low-cost airlines expansion and deregulations in air transport.

To conclude, it can be stated that ever since the first year of accession, explicit tourism growth can be connected with European Union integration in both Old Member States and New Member States. The EU accession made a noticeable difference in the tourism industry for New Member States as a group, but in spite of the overall growth there are still countries that did not take full advantage of the opportunity and still have grounds for tourism development.

### Questions and Activities

1. What are the main challenges for EU tourism?
2. Does tourism in the European Union consist of a single pattern?
3. Is tourism in the New Member States different from the one in the Old Member States? If yes, how?
4. What are the main objectives and priorities for tourism at EU level?
5. What should be done to improve and promote Romania's tourism? Name at least three different ideas.
6. What are, in your opinion, the strengths and weaknesses of the tourism sector in the New Member States?
7. Which are the main trends in the European tourism?
8. What are, in your opinion, the key factors that affected the tourism sector in the New Member States?

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