Benchtour project.

WP3-COMPARATIVE REPORT

Education and Culture DG

Lifelong Learning Programme

INDEX

MAPS AND TABLES INDEX

FIGURES INDEX

BACKGROUND

PROJECT DESCRIPTION

Small and medium-sized enterprises account for more than 90% of all European enterprises and are at the very heart of the European economy. At Community level[1], small and medium-sized enterprises (SMEs) are defined by a set of criteria concerning the workforce, turnover and independence of the business. In terms of the workforce alone, a micro-enterprise has fewer than 10 employees, a small enterprise fewer than 50 and a medium-sized enterprise fewer than 250.

The tourism sector in Europe is dominated by SMEs whose potentials have to be strengthened. **BenchTour: "Benchlearning in the Tourism sector"** is a European project within the framework of Leonardo da Vinci programme – Transfer of Innovation action that aims to stimulate learning processes in the workplace and to develop competences of employees and entrepreneurs in SMEs of the tourism industry in three different regions of Europe. It will provide an attractive - based on actual needs for SMEs in the tourism sector - form of training for workers and entrepreneurs and will increase the rate of adult education in the EU. In particular the project has the following objectives:

- To strengthen the self-reflection in SMEs.
- To strengthen the motivation and creativity of entrepreneurs and employees.
- To promote a strategic management in SMEs.
- To increased the involvement of the employees in change processes.

[1] Europa Glossary. [http://europa.eu/scadplus/glossary/sme_en.htm]

- To create a sustainable learning environment in the workplace.

“Bench-effect” is a method (developed in a EQUAL initiative "Schrittmacher OderSpree") to increase the employability of workers and to support the competitiveness of enterprises. It aims to improve learning processes in small and medium-sized enterprises (SMEs) based on motivation, participation, learning and changing processes.

Benchtour project aims to transfer and evaluate the “bench-effect” to tourism businesses in East-Brandenburg (Germany), Cracow (Poland) and Bucovina (Romania). The Tuscany (Italy) as a lighthouse of tourism is a positive reference example and will find suitable benchmarks and will provide them to the three other tourism regions involved. Bench-effect was tested only in general in East-Brandenburg. Therefore there will be - on the one hand – a transfer of a previously cross- sectoral application to the specific sector "tourism", and on the other hand a geographical transfer from East-Brandenburg directly to two more tourism regions (Cracow-Region and Bucovina) in Europe.

The project partnership includes 8 institutions from 5 European countries: Germany, Italy, Poland, Romania and Spain. This project will last 2 years from September 2009 to September 2011.

PURPOSE OF THE REPORT

The purpose of this report is to make a comparative analysis of the situation of the tourism sector in the respective project regions: Tuscany (Italy), Seenland Oder-Spree (Germany), Małopolska and Podkarpackie (Poland) and Bucovina (Romania) as a basis for the "bench-effect" method.

This report summarises the data gathered by each partner in their own region and compare the situation within the partnership regions taking into account the global context of tourism development in Europe.

INTRODUCTION TO THE COUNTRIES AND REGIONS

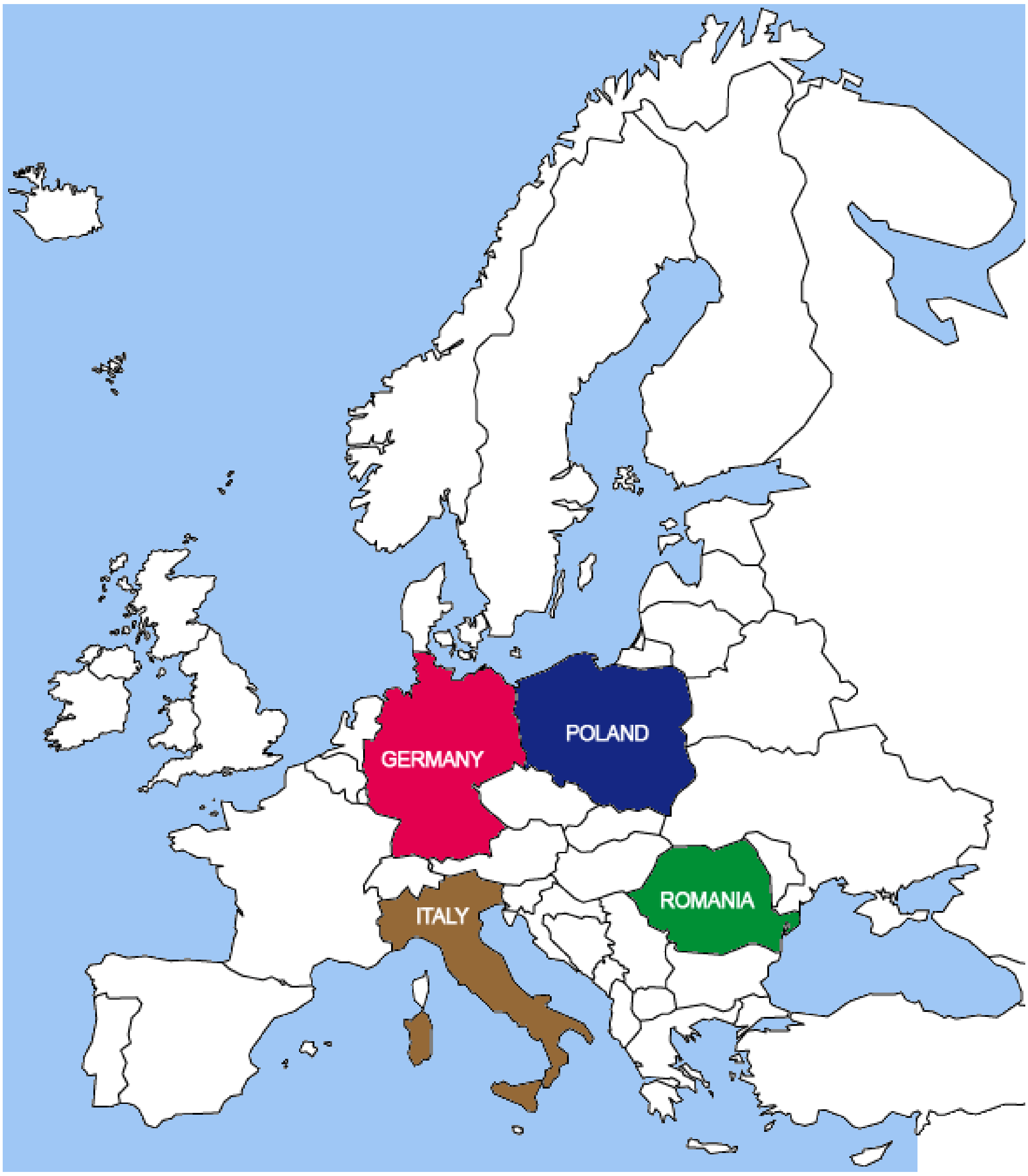

Figure 1 – Location of the study countries

ITALY.

Italy is a Mediterranean country in the south of Europe. Its west coast is the Mediterranean Sea and the east coast is the Adriatic. France, Switzerland, Austria, and Slovenia form its northern border. Italy is located in Southern Europe and comprises the long, boot-shaped Italian Peninsula, the land between the peninsula and the Alps, and a number of islands including Sicily and Sardinia. Its total area is 301.230 km², of which 294.020 km² is land and 7.210 km² is water. The capital of Italy is Rome.

Italy enjoys a predominantly Mediterranean (mild) climate with a colder Alpine climate in the mountains to the north and a hot and dry climate in the south. Italy's coast is pleasant almost all year. Much of Italy is very hot in summer and summer is the height of vacation season. Probably the best seasons to visit Italy are late spring and early fall.

Italy is divided into 20 regions with 18 on the mainland and two islands, Sardinia and Sicily. Although they are all Italian, each region still holds some of their own customs and traditions and there are many regional food specialities. In Italy, the region to be analysed is Tuscany.

TUSCANY

Roughly triangular in shape and situated between the northern part of the Tyrrhenian Sea and the central Apennines, Tuscany has an area of approximately 22.993 km². Surrounded and crossed by major mountain chains, and with few (but very fertile) plains, the region has a relief that is dominated by hilly country.

Whereas mountains cover 25% of the total area— 5.770 km², and plains a mere 8.4% of the total area, almost all coinciding with the valley of the Arno River, summing for 1.930 km², — overall hills make up two-thirds (66,5%) of the region's total area, covering 15.292 km².

Figure 2 – Italy / Tuscany

The climate, which is fairly mild in the coastal areas, is harsher and rainy in the interior, with considerable fluctuations in temperature between winter and summer giving the region a soil building active freeze-thaw cycle in part accounting for the region once having served as a key breadbasket of ancient Rome.

The population of Tuscany is 3.667.048 inhabitants in 2007, with a density of 161 inhabitants per km² in 2008, is below the national average (198,8 inhabitants for km²). This is due mainly to the low population density of the provinces of Arezzo, Siena and, above all, Grosseto (50 inhabitants for km²).

The highest density is found in the province of Prato (675 inhabitants for km²) followed by the provinces of Pistoia, Livorno, Florence and Lucca, peaking in the cities of Florence (more than 3.500 for km²), Livorno, Prato, Viareggio, Forte dei Marmi and Montecatini Terme (all with a population density of more than 1.000 inhabitants for km²). The territorial distribution of the population is closely linked to the socio-cultural and, more recently, economic and industrial development of Tuscany.

⇒ ECONOMY

The subsoil in Tuscany is relatively rich in mineral resources, with iron ore, copper, mercury and lignite mines, the famous soffioni (fumarole) at Larderello and the vast marble mines in Versilia.

Almost without exception, every town and city in Tuscany has considerable natural and architectural beauty. There is a continuous stream of visitors throughout the year. As a result, the services and distributive activities that are so important to the region's economy are particularly wide-ranging and highly organised.

GERMANY

Germany is located in the heart of Europe. Neighbours of Germany are the following countries sorted by cardinal points: North, Denmark; North East, Poland; East, Czech Republic; South East, Austria; South, Switzerland; South West, France; West Luxemburg and Belgium; North West, Netherlands.

The size of Germany amounts to approximately 360.000 km², 98% is land, whereas the rest consists of water in form of lakes and rivers. In Germany are living 82.3 million people. The population density is 232 inhabitants per square kilometre.

The capital of Germany is Berlin since the Reunion in 1990. The Federal Republic of Germany is a democratic state.

In Germany, the region of study is Seenland Oder-Spree.

SEENLAND ODER-SPREE

Seenland Oder-Spree is situated in the east of Brandenburg. In the north of it lies the administrative district Barnim, in the south of it – the administrative districts Dahme-Spreewald und Spree-Neiße. It borders Poland in the east and Berlin in the west.

Since 2008 “Planungsregion Oderland-Spree” exists. The task of the “Planning Community” is to measure and direct regional development in fields of infrastructure, economy and demography.

Figure 3 – Germany / Seenland Oder-Spree

Planungsregion Oderland-Spree consists of three administrative districts:

- Administrative district Märkisch-Oderland with its administrative centre in Seelow (see figure 6)
- Administrative district Oder-Spree with its administrative centre situated in Beeskow (see figure 6)
- Independent city Frankfurt (Oder)

It is important to point out that in matters of tourism the Planning Region Oderland-Spree does not include the independent city Frankfurt (Oder). Furthermore, the fusion of “Märkisch Oderland” and “Oder-Spree” for the tourism marketing does not depend on the “Planning Region Oderland-Spree”.

The region near Berlin and the peripheral region of Märkisch-Oderland differ greatly concerning economy, labour market and population. The regions near Berlin are much more structurally developed and less rural in comparison to the periphery.

Due to economic centres like Fürstenwalde/Spree, Beeskow and Eisenhüttenstadt Oder-Spree is, contrarily to Märkisch-Oderland, economically more homogeneous.

Frankfurt (Oder) is the smallest of the four county boroughs in Brandenburg. In its function as a development centre of the region Frankfurt (Oder) gives impulses of structural planning to the less developed surrounding area.

The three administrative districts, Märkisch-Oderland, Oder-Spree and Frankfurt (Oder), co-operate in many fields but tourism. In this sphere Frankfurt (Oder) operates independently.

Planning Region Oderland-Spree has a surface area of 4.519 km² and a population of 441.600 inhabitants. The population density is 98 inhabitants per km².

There are three economic agglomerations in Seenland Oder-Spree:

1. Eisenhüttenstadt & Frankfurt (Oder)

2. Fürstenwalde/Spree

3. "Future Area of the Eastern Land Around Berlin" which consists of the communities settled near Berlin along the interurban train to Strausberg and B1 added the communities near the eastern part of the "Berliner Ring".

In the year 2007 the GDP of Märkisch-Oderland, Oder-Spree and Frankfurt (Oder) amounts to 8.700 Euro. The GDP per capita of employed is 48.624 Euros; the GDP per capita amounts to 21.620 Euros. Consequently there is a huge gap between the GDP per capita and per capita of employed.

There are 119.500 employees 3.500 of whom are working in the primary sector, 29.500 – in the secondary sector, 28.500 - in the tertiary sector and 58.000 employees count to other services. This segmentation of human resources is very similar to the distribution in Brandenburg as a whole.

In 2007 there were 31.000 unemployed people living in Seenland Oder-Spree. In 2009 the situation got better: there were 27.000 unemployed and the average rate of unemployment was 12%. But for all that the number of short-time workers has risen tremendously as mentioned previously.

The situation in Seenland Oder-Spree resembles the demographic development in Brandenburg.

In 2007 the population of Planungsregion Oderland-Spree amounts to 441.600 inhabitants who live in 83 cities and communities. 191.000 in Märkisch-Oderland, 188.000 in Oder-Spree and 62.000 in Frankfurt (Oder). This makes Märkisch-Oderland and Oder-Spree two of the highest populated regions in Brandenburg. The general population density is 98 inhabitants per sq. km however there is a great disparity within Märkisch-Oderland and Oder-Spree concerning the population distribution. The regions near Berlin show significantly higher population density: from 192 inhabitants per km^2 to 324 inhabitants per km^2.

The population trends show that until 2020 Planning Region Oderland-Spree will count approximately 404.000 inhabitants. The number of people living in the Berlin near areas will rise from 43 % of total population to 47 %. This means that nearly half of the population of Seenland Oder-Spree inhabits only 16% of this regions area.

Additionally Seenland Oder-Spree will have to deal with an aging population. Since 1990 there is a visible trend showing that 2020 the number of people over 60 in Märkisch-Oderland will rise to 63.500, which is 120% more than in 1990 (28 900). The number of people under 20 and people between 20 and 40 will both decrease by over 30 %. Similar developments can be also noted in Oder-Spree and Frankfurt (Oder).

This demographic development is not exclusively characteristic for Seenland Oder-Spree, but for Europe, too.

⇒ ECONOMY

The labour market has a size of 727.500 employees. 24.000 of them are working in the primary sector, 189.500 in the secondary sector, 174.000 in the tertiary sector and 340.000 employees count to other services.

ROMANIA

Romania is situated in South East Europe, to the North of Balkans, in the inferior basin of the Danube, with an opening to the Black Sea, being cut by the Carpathian Mountains. The limits are 3.175,1 km from which 1.036,7 km are terrestrial and 2.138,4 km are river and maritime. Countries sharing borders with Romania are Hungary, Yugoslavia, Bulgaria and Republic of Moldavia and Ukraine. The capital of Rumania is Bucharest.

The population is 21.733.556 habitants[2], 8 place in Europe and 38 in the world. Distribution on the nationalities (2003): 20.408.542 Romanians (89,47%), 1.624.959 Hungarians (7,12%), 401.087 gipsies (1,75%), 119.462 Germans (0,52%), 65.764 Ukrainians (0,29%).

The climate is temperate-continental, characteristic to the Central Europe (hot summer, cold winters, very distinct seasons, abundant snowfalls especially in the mountains). Warmest areas are in the south.

In Romania, the region of study for this project is Bucovina.

[2] National Statistic Report – 2003, edited by National Institut for Statistics, chapter II, p.12

BUCOVINA

Figure 4 – Romania / Bucovina

Bucovina is a tourism destination situated in the northeast part of Romania and corresponds appreciatively to administrative unit of Suceava County. The surface area of Bucovina/Suceava County is of 8.553 km² with 705.730 inhabitants at 1st of July 2008. The Neighbours of Suceava County are to the East – Botosani and Iasi Counties; to the South – Neamt County, Harghita County and Mures County; to the West – Maramures County and Bistrita County. To the North are the boundaries with Ukraine. Suceava Town is the capital of the region and the area is well known for the outside painted monasteries registered as UNESCO monuments.

Bucovina (Suceava County area) has an unrivalled beauty. The relief descends from West to East slowly and each level is endowed by nature with beauties. The relief has the characteristics of a mountain region (more than half of the county), being covered by the northern group and the central part of the Oriental Carpathians (Bucovina Mountain Range-1.483 m), charming mountains which close between their ridges picturesque depressions. The USP of Bucovina Tourism has two main values: Nature and Culture.

ECONOMY

In 2006, the percent of population working in agriculture, is very high - 40,74% (higher than the national percentage -29,69%). Regarding the services sector, this is characterized by: a strong concentration in the developed centres of the region (Suceava), while in the rest of the territory it has a very low weight; focusing on commerce and restaurant activities; tourism services are not capitalized at the level of the existing potential; the advisory services are insufficiently promoted. The development of tourism in a certain area has positive effects on other economic branches, as well, by increasing the demand of goods and services, by stimulating production and determining its orientation towards the development and modernization of tourist structures and by invigorating the sectors and branches involved. The ultimate result is the one and only, namely the growth of the economic efficiency in all sectors of activity.

POLAND

Poland is located in the central part of the European continent which geometrical centre is situated near Warsaw. Poland's total surface area is 322.500 km² (312,600 1 km² of land, 1,2001km² of inland waters, and 8,700 km² of territorial waters). This makes Poland the ninth largest country in Europe and the 63rd largest in the world. The capital of Poland is Warsaw.

In the north Poland is washed by the Baltic Sea. Russia and Lithuania are the northern neighbours. To the east, Poland is bordered by Ukraine and Belarus, southern neighbours are Slovakia and the Czech Republic, and western is Germany.

Poland is characterized by mild climate, which provides ocean air masses. From the west winds bring cool and rainy in summer and heavy snowfalls in winter, while in the east - hot summers and frosty winter. Weather is very unstable, rainy and on overcast days often gives way to sunny and clear.

In Poland, there are two regions of study: Małopolska and Podkarpackie.

MAŁOPOLSKA AND PODKARPACKIE

Figure 5 – Poland / Małopolska and Podkarpackie

The **Małopolska Region** is located in the southern part of the country and borders on Slovakia. Małopolska is one of the smallest voivodeships. Cracow is the capital.

The surface area of Małopolska is 15.190 km², it concentrates a large population approximately 3.300.000 inhabitants. Population density is high.

⇒ ECONOMY

The labour market has over 50% in the market service.

Podkarpackie is located in south-east Poland. It borders with Slovakia and Ukraine. The Podkarpackie’s area is 17 844 km², which constitutes 5.7% of the total area of Poland.

The population of the Podkarpackie is approximately 2.200.000 inhabitants, which constitutes 5.5% of the total Polish population. There are 118.7 people per km² and the province is seventh in the country in population density. In the most densely populated Łańcut district, there are 172 people per 1 km². The least densely populated is the Bieszczady district, with 26 people per 1 km².

Rzeszów is the capital of the province.

⇒ ECONOMY

The labour market has about 50% in the market service.

ECONOMY – Summary table

	TUSCANY	SEELAND ODER-SPREE	BUCOVINA	MAŁOPOLSKA	PODKARPACKIE
Economy	Mining and tourism	Market services	Agriculture	Market services	Market services

Table 1 – Economic sectors

TOURISM SECTOR IN EUROPE

As the European Commission -DG Enterprise and Industry, Tourism Unit- states[3], tourism is one of the activities endowed with most significant potential to generate growth and employment in the EU. Moreover, tourism contributes to the development and socioeconomic integration in rural, peripheral or less developed regions. In 2006, tourism in its narrow definition[4] contributed some 5% to EU GDP. However, the indirect contribution of tourism to GDP is much higher: tourism, together with the related sectors[5], generates indirectly more than 10% of EU GDP and accounts for almost 12% of total employment. The rate of job creation in tourism is higher than the average of the European economy as a whole. During the last decade, the annual growth rate of employment in the tourism sector has almost always been higher than the growth rate of total employment.

According to EUROSTAT statistics, the European Union consistently appears as the number one tourism destination in the world, with 380 million international tourist arrivals, representing 42% of the total number of international arrivals in the world recorded in 2007. The income generated by foreign tourists at EU level amounted up to 75.6 billion €, in 2007. The European Union also represents an important source of tourists: in 2008, the number of trips made by EU residents, independently of the destination and duration of travel, exceeded 1 billion (1.4 billion trips). In terms of expenditure, the EU ranks first at international level, with tourism spending by the Community residents outside the EU of 94.2 billion € in 2007.

According to Panorama in Tourism[6], the evolution of international tourism is affected by a number of factors whose impact is in some cases difficult to understand merely by

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[3] Discussion document: A new framework for the tourism policy in the EU 2010.
[4] Traditional travel and tourism providers (hotels, restaurants, cafes, travel agencies, car rentals, airlines etc.) that supply goods and services directly to visitors.
[5] Namely, distribution and construction sectors, as well as transport companies in general.

[6] Panorama in Tourism (2008 edition). EUROSTAT statistical book.

looking at the statistical data on nights spent, tourism income and expenditure. In recent years, the extreme volatility of the international socio-economic and political scene and a number of significant events in many countries has had a major impact on tourists' decisions regarding holidays.

The most important positive and negative factors that have shaped the development of international tourism in Europe since 2004 are grouped into five main categories:

- Political factors
- Economic factors
- Social, health and weather factors
- Market and accessibility factors
- Technology factors

Besides cyclical trends, it is also worth looking at a number of structural factors that influence the demand for tourism in the medium and long term.

The demographic trend in Europe is characterised by a steady growth in the number of elderly people (65 years and over), who will account for more than a fifth of the total population in 2020 (16.5% in the EU-25 area in 2005 - Eurostat Yearbook 2006-2007), and by an increase in singles and young couples without children.

The Eurobarometer survey on 'The attitudes of Europeans towards tourism'[7] also shows that the largest proportion of holidaymakers across the EU (37%) said that the major motivation for their main holiday in 2009 had been "rest and recreation". About a fifth (19%) had wanted a sun/beach holiday and 17% said the main objective had been to visit friends or relatives. "City trips", "nature" and "culture and religion" were each selected by less than a tenth of holidaymakers (6%-7%). Less than 1 in 20 EU citizens who took a holiday mentioned sports- or health-related factors as the major motivation for their main holiday in 2009 (both 3%-4%).

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[7] Flash Eurobarometer 291, conducted by The Gallup Organisation, Hungary upon the request of Directorate General Enterprise and Industry. Fieldwork: February 2010 & Publication: March 2010

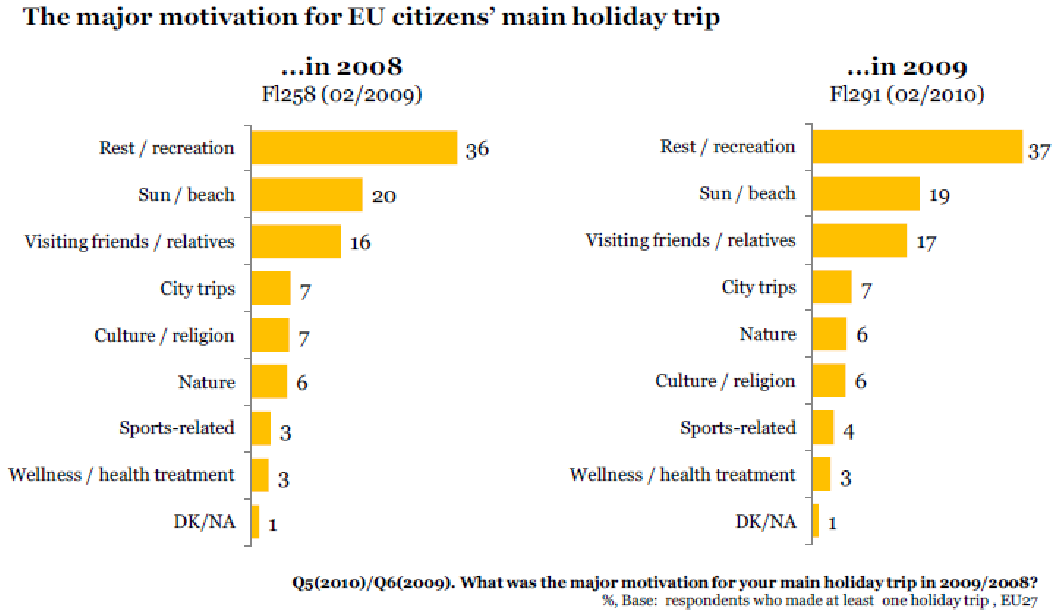

Figure 6 – Holiday trip motivation for EU Citizens'

Concerning the types of companies operating in the tourism industry, it encompasses, among other activities, travel organisers, accommodation providers, local tourist offices, visitor attractions and tourism-related transport activities. Very small companies operate alongside large multinational corporations to serve a wide variety of customers. Moreover, private and public activities are often intertwined. This makes the tourism industry a very complex industry with a highly fragmented value chain.

The Study on the Competitiveness of the EU tourism industry[8] says "approximately 340,000 companies operate in the accommodation and travel organisation sectors, which provided jobs for nearly 2.8 million people in 2006. This equates to 1.2% of total

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[8] September 2009. Within the Framework Contract of Sectoral Competitiveness Studies – ENTR/06/054 http://ec.europa.eu/enterprise/newsroom/cf/document.cfm?acti%20on=display&doc_id=5257&userservic

employment in the EU-27. Together, these sectors generated a turnover of around €290 billion. With more than 90% of the companies concerned employing fewer than 10 people, "micro-enterprises" form the backbone of the industry".

As tourism demand in the EU has grown steadily, tourism enterprises have increasingly generated additional employment, turnover and added value. Over the last decade, the job creation rate in the EU tourism industry was above the average observed for the EU economy as a whole. The tourism industry plays a particularly important role in terms of employment of women, young people and the less skilled. For these reasons, the tourism industry has been identified as an industry with an important role to play in attaining the EU's goals for growth and jobs, as set out in the Lisbon Strategy.

Tourism in the OECD economies

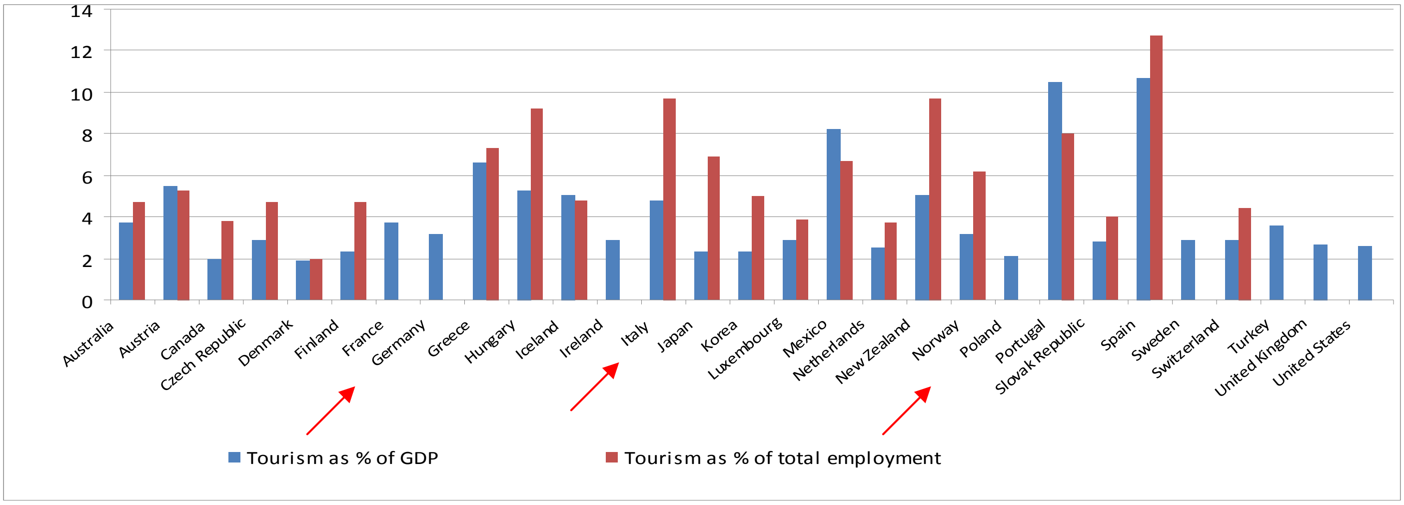

Figure 7 – Tourism in the OECD economies

Tourism in non members (OECD) economies

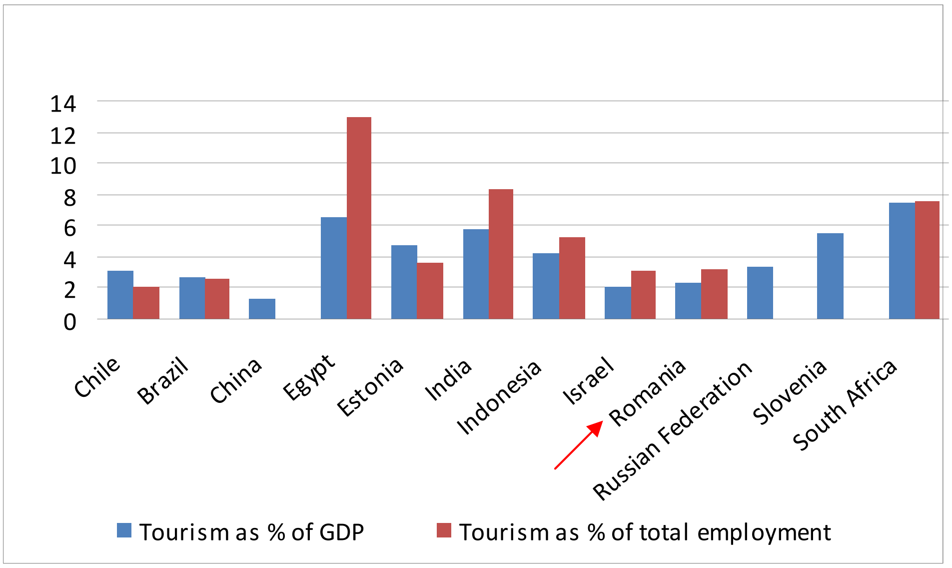

Figure 8 – Tourism in non members OECD economies

TRENDS AND CHALLENGES AT EUROPEAN LEVEL

According to the forecasts of the World Tourism Organisation[9] Europe will remain the world's most important tourist destination and tourism generating region. In order to be able to maintain the role and the position of the EU as the number one tourist destination in the world, **the European tourism should adapt to an increasingly large number of challenges (such as, for example, the EU tourist enterprises' capacity to absorb innovation and new technologies, the increasing international competition, etc.)** so as to avoid losing market share in relation to other regions of the world.

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[9] UNWTO, Tourism 2020 Vision, Tourism Highlights 2008

The importance of the tourism industry for economic, social and cultural development in Europe and the role of tourism as a driver of development and socioeconomic integration are generally acknowledged. Eurostat[10] states, between others, the following highlights:

• **The tourist accommodation sector accounts for more than 25% of employment in the hotels, restaurants and catering** (horeca) sector and for slightly over 1% of the entire labour market in the EU.

Table 1: Number of persons employed, by economic activity (2007) – in thousands

	All economic activities	Hotels and restaurants sector	Tourist accommodation sector
EU-27[2]	218 663	9 178	2 308
BE	4 380	151	:
BG	3 253	163	38
CZ	4 922	182	47
DK	2 804	82	22
DE	38 210	1 433	375
EE	655	23	:
IE	2 112	127	:
EL	4 510	312	78
ES	20 356	1 451	337
FR	25 642	875	256
IT	23 222	1 154	238
CY	378	24	12
LV	1 118	31	:
LT	1 534	34	.
LU	.	.	:
HU	3 926	163	37
MT	156	13	8
NL	8 464	359	72
AT	4 028	259	94
PL	15 241	291	90
PT	5 170	289	59
RO	9 353	137	34
SI	985	39	:
SK	2 358	102	27
FI	2 492	84	17
SE	4 541	143	37
UK	28 441	1 247	:
HR	1 614	95	.
TR	21 207	990	:
IS[1]	168	6	2
NO	2 434	67	23
CH	4 122	154	:

Source: Eurostat, EU Labour Force Survey

Notes: 1) Iceland: 2006 data; 2) EU-27 for "All economic activities" and "Hotels and restaurants sector" include estimates for LU; EU-27 for "Tourist accommodation sector" includes estimates for BE, EE, IE, LV, LT, LU, SI and UK.

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[10] EUROSTAT. Statistics in focus 90/2008

• With a relatively high share of female workers (60%) and of workers with low formal educational qualifications (36%), tourist accommodation is a source of jobs for certain at-risk groups on the European labour market.

According to the Roadmap for a competitive tourism industry, **“the challenge for the European tourism industry lies in capitalising on the existing opportunities in society by further exploiting its major strengths and by minimising existing weaknesses.** This brings to six clear challenges for the EU tourism industry in order to enhance the competitiveness of the EU tourism industry” [11]

These six **key challenges** are:

1. Reinforce the EU tourism industry as a high quality service sector
2. Better position the EU as the n°1 tourism destination in the world
3. **Make the tourism industry part of the knowledge economy**
4. Develop EU tourism in a sustainable manner
5. **Increase the value generated from available resources**
6. Ensure sufficient “oxygen” for tourism businesses

To effectively tackle the six key challenges for the EU tourism industry, actions are needed in five major fields:

- Support tourism demand
- Stimulate innovation and entrepreneurship
- Combine available resources more efficiently
- Ensure that development of tourism is sustainable
- Provide “oxygen” to the industry

[11] “Study on the Competitiveness of the EU tourism industry - with specific focus on the accommodation and tour operator & travel agent industries”. Within the Framework Contract of Sectoral Competitiveness Studies – ENTR/06/054

Like all the economic sectors, tourism was affected by the recent economic downturn, but has proven to be, nevertheless, one of the most crisis resistant activities. The two Eurobarometer surveys on tourism carried out in 2009 showed that the European tourists continue travelling, even if their attitudes tend to adapt according to the circumstances. This underlines the fact that, during the last decades, **tourism became an important aspect of the European citizens' habits.** Thus, in 2008, 53,9% of the population of the EU (aged 15 or more) made at least one holiday trip of at least 4 overnight stays with in Europe or elsewhere.

The survey on "The attitudes of Europeans towards tourism", shows that EU citizens increasingly prefer to spend their holidays in **traditional tourist destinations (57%)**, while 28% would rather go "off the beaten track" to emerging destinations. Some of the findings of this survey are:

- **"Local attractiveness"** is cited as the major factor (32%) when choosing holiday destinations, followed by "cultural heritage" (25%) and "entertainment possibilities" (16%).
- Seeking **"rest and recreation"** (37%) is the main motivation for EU citizens to travel, followed by "sun and beach" (19%) and "visiting friends and relatives" (17%).

TOURISM IN THE REGIONS OF STUDY

INFRASTRUCTURES

As far as the infrastructure system is concerned, the following elements are going to be analysed in each region: road network and transport (trains, airports and bus).

TUSCANY

ROAD NETWORK

The Tuscan region has a well-developed road network, especially along the coastline and around the area of Florence. The Italian major highway A1 connecting Northern Italy with Southern Italy also crosses Tuscany, nearby Florence and Arezzo. The other major highway is A11 connecting Florence to the coast, including the towns of Pisa, Lucca and Livorno. The road network in Tuscany also includes toll-free highways, such as the road connecting Livorno with Rome. There are plans for further development of the road network in Tuscany, especially in the area near Florence, with the A1 becoming soon a 3-lane highway.

TRAINS

Florence's main train station, Firenze Santa Maria Novella, sits astride the main Rome-Milan line (with connections in Bologna and Arezzo) and is the terminus for two lines to the west – one to Livorno via Pisa and Empoli and one to Viareggio via Prato, Pistoia and Lucca. Direct lines run to Siena (sometimes with changes at Empoli) and Faenza in Emilia-Romagna (a scenic ride through the Apennines). Italy's main west coast line route runs through Tuscany linking Orbetello in the south to Livorno, Pisa, Viareggio and Massa in the north. To proceed to smaller towns near these main towns, you will often need to make a bus connection.

High-speed trains (TAV) are already available between Florence-Rome and Florence-Bologna.

AIRPORTS

The two major airports in Tuscany are the Galilei Airport in Pisa, and Vespucci Airport in Florence. The first one is by far the most important in terms of number of flights and passengers transported. Galilei airport connects the Tuscan region with the major European capitals, as well as with other destinations in the world, like New York (USA). Airline companies like Ryanair and Easyjet fly from and into Pisa airport. Florence airport is much smaller and not well connected with other airports in Europe; therefore plans have been made to develop the latter one.

BUS

There are several bus companies, which regularly connect the major cities in Tuscany and also other major towns across Europe with the Tuscan region. The services offered by most of these companies have high quality standards.

SEENLAND ODER SPREE

Seenland Oder-Spree has a well developed transport network that includes a wide road network, a rail network, waterways with inland harbours in: Eisenhüttenstadt, Fürstenwalde/Spree, Hartmannsdorf Oder (at the polish border) with inland harbours in Eisenhüttenstadt and Eberswalde and airports for traffic airfields, special aircrafts and the international airport Berlin Brandenburg International.

ROAD NETWORK

Federal Highways: 1, 5, 87, 112, 158, 167, 168, 246

E-routes and motorways: A10/ E55, A12/ E30

BUS

Busverkehr Märkisch-Oderland GmbH (BMO), Busverkehr Oder-Spree GmbH (BOS)

DB Regio AG, Barnimer Busgesellschaft mbH (BBG)

TRAIN

Railway Numbers: 60, 26, EC/1, 1, 35, 36, 11, S5

There are more than 61 rail stations. The trains run at hourly intervals, on the route EC/1 every half an hour.

WATERWAYS

Spree-Oder-Waterway with inland harbours in Eisenhüttenstadt, Fürstenwalde/Spree, Hartmannsdorf

Oder (at the polish border) with inland harbours in Eisenhüttenstadt and Eberswalde

AIRPORT

Traffic airfields to Strausberg, Eggersdorf, Fürstenwalde/Spree, Eisenhüttenstadt Airfields for special aircrafts to Neuhagenberg, Frankfurt (Oder)

The international airport Berlin Brandenburg International (planned)

IN PROJECT

The "Regionale Planungsgemeinschaft Oderland-Spree" has initiated many projects in order to ensure further development in co-operation with the neighbouring EU member states. To name some:

- Within the framework of the project PRO EUROPA VIADRINA a general cross-border traffic concept will be shaped.
- Fit out of the railway line RE 1 to a double tracked route suitable for trains travelling with 160 km/h.
- Development of a new railway line RE 200: a cross-border route from Berlin to Warsaw.
- Fit out and modernisation of the line 26; by 2013 the sections between Strausberg and Küstrin and between Kostrzyn and Gorzow will be suitable for trains travelling with 120 km/h.
- A new road section, „Oder-Lausitz Straße“ that will connect the economically important regions of Seenland Oder-Spree with each other.
- Completion of the polish motorway A 2 and the opening of the Berlin Brandenburg International Airport BBI.

BUCOVINA

ROAD NETWORK

Suceava County has a good network of roads. One E-road is crossing Bucovina, E85, coming from the South of the country, and driving up to Ukraine, through Siret Custom. Suceava can be reached by car from South, from the capital Bucharest on E85/ DN2 Bucureşti, Urziceni – Buzău – Focşani – Adjud – Bacău – Roman – -- Suceava and from the West on DN 17 Cluj Napoca – Dej – Beclean – Salva – Năsăud – Sângeorz Băi – Vatra Dornei – Gura Humorului – Suceava.

TRAIN

The main train stations are: Suceava (Gara Suceava), Gura Humorului, Vatra Dornei and Radauti.

Suceava town has two train stations: Gara Suceava Nord and Gara Suceava in the Burdujeni district.

AIRPORT

The air transport that the region benefits on is sustained by a specific infrastructure, constituted by one airport that serves internal courses and, occasionally external flights. The Suceava Airport is situated in Salcea, 15 km East from Suceava City and 40 km from Botosani City, the access being assured on the National Road 29.

Frequent flights to Suceava are available from Bucharest. The total flight time is approximately one hour, with a small stop in Bacau. Salcea Airport is 17 kilometres from downtown Suceava. On Suceava Airport are flying 3 airline operators: Tarom, Carpatair and Blue Air. Carpatair is offering also international flights, via Bucharest or Timisoara airport (short stop on these airports).

BUS

International Bus Companies serving Suceava –ATLASSIB – scheduled bus service to Germany, Italy, France, Sweden, and Spain. Public transportation is a convenient way of becoming more familiar with the landscape and the local people. Buses follow a tight schedule and are convenient to use. Several buses and small buses (“microbuses”) routes connect Suceava’s main areas and tourist attractions. A bus ticket, valid for two trips in Suceava Town costs about 0.30 EUR.

MAŁOPOLSKA

ROAD NETWORK

The A4 motorway Krakow–Katowice, national E4 road Zgorzelec–Medyka

The basic road network of the region is formed by national roads with a total length of 874.6 km including 85.5 km of motorways.

AIRPORT

Cracow-Balice International Airport offers direct flights to: Amsterdam, Athens, Barcelona, Berlin, Birmingham, Brussels, Budapest, Chicago, Dublin, Dubrovnik, Dortmund, Edinburgh, Frankfurt, Gdansk, Glasgow, Hamburg, Helsinki, Cologne/Bonn, Liverpool, London, Manchester, Milan, Munich, Naples, New York, Oslo, Prague, Paris, Rhodes, Rome, Stuttgart, Tel Aviv, Turin, Zurich, Warsaw, Vienna.

RAILWAY

The rail network in the Małopolska voivodeship is managed by PKP Polish Railway Lines JSC. The total length of railway lines is 1040.7 km. Trunk lines are 14.82% (154.2 km) of the total line. The largest share have those of prime category (56.26%, 585.5 km) and secondary (21.22%, 220.9 km). The rest (7.70%, 80.1 km) are lines of local importance.

The greatest burden is on the passenger traffic trunk lines:

- Kraków –Trzebinia – Katowice;
- Kraków –Tarnów;
- Kraków –Warszawa.

Starting in 2001, the voivodeship began carrying out tasks related to organizing and subsidizing regional rail passenger transport. This task is completed on the basis of agreements concluded between the Małopolska Voivodeship and the carrier rail. From 2004 regional rail services are subsidized by the government's own province budget.

PODKARPACKIE

ROAD NETWORK

Two international highways pass through the Podkarpackie province:

E–40 from Germany through Wroclaw, Krakow and Rzeszów to Ukraine

E–371 from Warsaw through Rzeszów to Slovakia

Also, domestic roads in the Podkarpackie have the total length of 719 km.

AIRPORT

In Jasionka, close to Rzeszów, there is an international airport, able to provide a 24-hour a day servicing of flight operations, including passenger aircraft handling and cargo services.

Local airports are located in: Mielec (local factory airport used to provide services for agricultural sector, with plans to use it as a domestic passenger and cargo airport, because it is located close to the special economical zones), Turbia by Stalowa Wola (the airport is used for sport and training flights, but due to an excellent geographic localization and the need to develop the region, it might be adopted for passenger and cargo services) and Krosno.

RAILWAY

Currently, the only carrier having a license to engage in railway passenger transport in the Podkarpackie Province is "PKP Regional Services Ltd. Warsaw. The timetable for 2007/2008 includes 123 of trains per day, which will operate 2.85 million km. The total length of railway lines (Podkarpacie voivodeship) is 611km. These are classified as:

- State lines – 260 km;

- Other lines – 351 km.

The main railway line of the Podkarpacie voivodeship is the trunk line Kraków-Dębica-Rzeszów-Przemyśl-Medyka, part of 3rd Panaeuropean Transport Corridor West-East (E30). It is practically the only railway line that allows travelling/ transportation to West, East or North.

IN PROJECT

Planned initiatives are following:

- Project of retro train connecting Przemyśl and Lwów (Ukraine) and Galician Narrow-Gauge Railway, project of Wisłok water route (canoe route) Frysztak-Rzeszów.
- Improvement of regional communication accessibility: construction and expansion of regional and local airports.

TRANSPORT INFRASTRUCTURE – Summary table

	Road	Train	Airport	Bus	Waterway
TUSCANY	National connection	National connection / High speed trains National connection (TAV) are available	International connection	National and European connection	
SEENLAND ODER-SPREE	International connection (with the motorways E55 and E30)	International connection	International connection	National connection	International connection
BUCOVINA	National connection	National connection	National connection International connection via Bucharest or Timisoara Airport	International connection	
MAŁOPOLSKA	National connection	National and international connection	International connection	National connection	
PODKARPACKIE	International connection	National and international connection	International connection	National connection	

Table 2 – Infrastructure data

Table 2 shows that the level of transport infrastructures allows the reception of international and national tourists in all the regions. All of them have a good network of roads (national or international) that facilitates the access to tourism (mainly domestic tourism). Concerning the means of transport, all the regions have good connection by train and bus and it is worth mentioning that all the regions, except Bucovina, have an airport with international connection.

TOURIST ACCOMMODATION ESTABLISHMENTS

The classification of establishments used by each partner has been respected for the preparation of the following tables.

TUSCANY

Types of accommodation	Number of establishments	Number of beds	Occupancy rate 2007 (%)
Hotels			
5 *	46	486.351	313,24%
4 *	465		
3 *	1.525		
2 *	691		
1 *	362		
Farmhouses	4.427		
B&B	1.629		
Room rental	3.387		
Camping	269		
Holiday houses	1.603		
Holiday apartments	226		
Residence	197		
Hotel Residence	270		

Types of accommodation	Number of establishments	Number of beds	Occupancy rate 2007 (%)
Historic Houses	108		
Villages	19		
Camper areas	13		
Alpine refuges	45		

Table 3 – Establishments in Tuscany

SEELAND ODER SPREE *

Types of accommodation	Number of establishments	Number of beds	Occupancy rate 2007 (%)
No data available	240	14.534	35

Table 4 – Establishments in Seenland Oder-Spree

***2007, without camping places and holiday homes and rooms**

BUCOVINA

Types of accommodation	Number of establishments	Number of beds	Occupancy rate 2007 (%)
Hotels			
4 *	35		
3 *	98		
2 *	101		
1 *	6		
Motel	6		
Pension	76	6.831	25,6 (Official data, the real rate is higher)
Agro-tourism pensions	93		
Chalet	8		
Villa	16		
Hostel	1		

Camping	7		
Inn	2		
Other	2		

Table 5 – Establishments in Bucovina

MAŁOPOLSKA

Types of accommodation	Number of establishments	Number of beds	Occupancy rate 2007 (%)
Hotels 5 *	6	1.650	50,5
4 *	21	3.716	43,4
3 *	108	10.441	42,2
2 *	50	5.994	38,5
1 *	12	862	35
During categorization	7	332	36,4
Motel	9	368	25,5
Pension	64	3.603	37
Agrotourism accommodation	1.590	17.927	NO DATA
Excursion hostels	10	688	28,4
Shelters	66	3.919	22
Holiday centres	129	9.127	34,4
Holiday youth centres	10	511	25
Camping	13	1.733	16,6
Training recreational centres	70	5.578	36,2
Creative arts centres	13	424	35,3
Complexes of tourist cottages	14	855	29,5
Tent camp sites	12	860	20,3

Weekend and holiday accommodation	6	496	15
Health establishment	36	4.476	73,8
Other	216	13.176	27,3

Table 6 – Establishments in Małopolska

PODKARPACKIE

Types of accommodation	Number of establishments	Number of beds	Occupancy rate 2007 (%)
Hotels 4 *	1	112	27,1
3 *	30	2.138	28,2
2 *	25	1.232	26,8
1 *	10	482	29,6
During categorization	2	130	28,2
Motel	4	137	30,1
Pension	11	501	25,1
Agrotouristic accommodation	1.074	8.288	NO DATA
Excursion hostels	8	551	21,2
Shelters	49	2.387	30,9
Holiday centres	19	1.938	37
Holiday youth centres	1	90	36,6
Camping	3	450	13,5
Training recreational centres	23	2.490	30,2
Complexes of tourist cottages	21	1.062	35,8
Tent camp sites	18	1.285	12
Weekend and holiday accommodation	1	8	74,2

Health establishment	10	1.714	75
Other	119	4.642	26,7

Table 7 - Establishments in Podkarpackie

ESTABLISHMENTS – Summary Table

	Number of establishments	Number of beds
TUSCANY	15.282	486.351
SEENLAND ODER-SPREE	240	14.534
BUCOVINA	451	6.831
MAŁOPOLSKA	2.455	64.127*
PODKARPACKIE	1.427	20.652*

Table 8 – Total establishments

This table shows that Tuscany has the highest tourist accommodation capacity (highest number of bed places in hotels and similar establishments and on campsites), followed by Małopolska and Podkapackie in Poland.

The different characteristics (geographic, climate…) and size (surface, population…) of the regions must be taken into account.

Within accommodation the figures reveal the **importance of farmhouses and agrotourism accommodation** in all the regions (except in Germany where this data is not available).

*According to Central Statistical Office in Poland, agrotouristic accommodation is excluded of the bed-places calculation. In this table, the figures for Małopolska and Podkarpackie don't include agrotouristic accommodation although in tables 6 and 7 can be observed that this type of accommodation means an important number of beds for both regions.

TOURISM INITIATIVES, STRATEGIES AND POLICIES

Tourism is an important economic activity in the modern Europe. It comprises a wide variety of products and destinations and many different stakeholders are involved – both public and private - with very decentralized areas of competence, often at regional and local levels. Tourism has great potential as regards contributing to the achievement of several major EU objectives, such as sustainable development, economic growth, employment and economic and social cohesion.[12]

All the regions participating in the project have different initiatives, strategies and policies related to tourism. These initiatives are promoted by the organisations responsible for tourism in each country or region:

- Florence and province: **APT** (Tourism Promotional Agency) in collaboration with the **Chamber of Commerce** and the company **Toscana Promozione.**

- Seenland Oder-Spree: the **German National Tourist Board**.

- Bucovina: **Romania Tourism Ministry** and **Romanian Authority for Tourism**.

- Poland: the initiatives are promoted first of all by **the Ministry of Sport and Tourism**, secondly by the **Polish Tourism Organisation and Regional and Local Tourism Organisation** (e.g. in Małopolska or Podkarpacie).

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[12]Manfred Pils (member of Board IFN-International Friends of Nature) – ***New Trends in Tourism***, Workshop 15-16 October 2004, Hotel Budapest Hilton

REGION	TOURISM INITIATIVES	TOURISM STRATEGIES	TOURIST PRODUCTS
TUSCANY	**The Agency activity sectors are three**: Agriculture and Food Industry; small and average industrial businesses and quality craftsmanship; tourism. • Agriculture and Food. Safeguarding and increasing the value, in Italy and abroad, of the quality products of our land that, linked to the traditions and typicality of the Region, have determined a concept of "Tuscanity" in the world; • Promoting the winemaking and agricultural/food sector of Tuscany, with special attention to certified, typical and traditional products; • Coordinating and harmonizing the sector's economic promotion initiatives; • Managing the participation of consortiums, cooperatives, local bodies, agricultural estates and operators to the most important international and national Trade Fairs for agriculture and food, designing shared exhibition spaces to coordinate and support their presence.	• To promote, in Italy and abroad, the whole of the tourism offer to favour tourism in the country, at the seaside, on the mountains, in the cities of art. • To regain internal tourism, also through the valorisation of an alternative tourism and of the environmental resources of the territory; • To draw attention on complementary and innovative tourism sectors such as health and wellness, eco-tourism, school tourism and outdoor tourism; • To support through direct interventions the relaunch of tourism shows (Show of Sport Tourism, Show of Associated Tourism, Show of Convention Tourism of Florence) and coordinate the participation of Tuscan businesses to the most important sector shows in Italy and abroad; • To realize specific projects supporting mountain and sea tourism: Toscana Verde and Toscana Blu; • To coordinate educational programs for journalists and tour operators in order to promote specific areas of the territory;	***1. Tourism of art and culture***. The expansion of the number of tourists interested in the cultural aspects of Tuscany involved a higher and more articulated demand by the public, which also considers art tourism a form of vacation. Segments of cultural visitors: ➢ The cultural tourist type staying in the Tuscan towns ➢ The visitor who arrives from a nearly tourism location ➢ The visitor interested in art exhibitions or the cultural manifestations of miscellaneous kind ➢ The tourist searching for small villages, agricultural tourism, older traditions, etc. **2. *Food and wine tourism*** **3. *Nature and Sport***. Sports activities such as trekking, horse riding, bike riding, diving, sailing and surfing are pivotal. ***4. Spas and Wellbeing.*** Health Centres, Fitness

REGION	TOURISM INITIATIVES	TOURISM STRATEGIES	TOURIST PRODUCTS
	• Organizing seminars, workshops and round tables on specific issues of the agriculture and food sector, training stages and exchanges with the operators of other European Countries and Latin America in the view of future partnerships; • Supporting agrotourism and the wine tracks for the safeguard and valorisation of the territory within the scope of an integrated rural development; • Educating the youth to respect the environment through a teaching activity within the scope "School in the Country"; • Carrying out a coordinated and articulated communication strategy also through publishing and multimedia initiatives. • Small and Average Businesses and Craftsmanship		clubs, hotels with sports facilities and dietary centres are the witness for this evolution, which involves new ways of tourism. ***5. Beach tourism*** The competitive development of a new form of beach tourism requires an action plan which focuses particularly on: • The tourist products connected to the seaside element; • The tourist products connected to the inland, in particular to the cultural resources and the environment which require to be coherently integrated with the beach tourism; • The products which can contribute to diversify the market offer, so as to avoid the risk to lose market shares; • The diversification and the enhancement of the accommodation solutions, with a particular attention to the accommodation system of the second houses; • The adoption of appropriate price policies; • The creation of opportunities for sports and free time; • The activation of new nets of cooperation

REGION	TOURISM INITIATIVES	TOURISM STRATEGIES	TOURIST PRODUCTS
			between operators of various productive fields. ***6. Business Travel*** The **demand and the requirements** of the congress tourism, which we need to address properly, are: • Adequate accommodation and conference facilities; • Easy accessibility; • Efficient connections with other regions; • Other tourist assets (sport and culture)
SEENLAND ODER-SPREE	The German National Tourist Board (DZT) promotes Germany international-wide and communicates Germany as travel destination. The DZT communicates via two main topics which are the biggest strengths of Germany and have a high potential: • Culture and events as well as • Nature, activity and recreation.	**Strengths:** • **Nature:** It is possible to do water sports like water-ski or canoe, to bicycle or to hike. The culture tourism is important as well, because of historical cities. • **Quality:** A lot of quality offensives are implemented like the DTV classified holiday rooms and houses, hospitality of Brandenburg ("Brandenburger Gastlichkeit") and thematic seal of quality like "Gelbe Welle", ADFC certified cycle tracks and "bed&bike" companies. The guideline for Brandenburgs' quality refers to a Swiss model, the Service Quality Germany. • **Berlin.** The geographic proximity of Berlin is a	*Positioning of Brandenburg* The positioning of Brandenburg is divided into three main issues: *1. **Day-trip tourism**:* Brandenburg profits from the visitors of neighbouring countries that is why the cooperation has to be extended. ***2. Theme tourism:*** Theme tourism is suitable for the nature spatial, infrastructural and cultural potentials of the single regions and not the state as a whole. Important market segments for theme tourism in Brandenburg are: • Active tourism like bicycle, hiking, riding and water tourism

REGION	TOURISM INITIATIVES	TOURISM STRATEGIES	TOURIST PRODUCTS
		huge advantage. As the “capital region Berlin-Brandenburg”, Brandenburg profits from the visitors of Berlin.	• Nature- and wellness tourism • Family tourism • Business tourism but also barrier-free tourism ***3. International tourism:*** The international market has a huge growth potential. It is necessary to create theme offers in different languages and to extend the cooperation to Berlin. Source markets are especially neighbouring countries like Swiss, Denmark, Norway, Poland etc. but also the USA, China and India. The main topics of the **Operational Marketing Plan** are: nature oriented **active tourism, culture tourism, wellness/health tourism, meetings, seminars, congresses and day-trip tourism.** These main topics have a high potential and are taken as a centre stage. Sub topics of Brandenburg are city and shopping tourism, sports activities, camping and caravanning as well as children/youth and family tourism. **Water Sports** Development Plan III (wep3) The aims of the water sports development are: • Complete and supplement the legacy water routes • Support the human powered sport activities

REGION	TOURISM INITIATIVES	TOURISM STRATEGIES	TOURIST PRODUCTS
			• Definition of districts and routes • Support regional initiatives • Develop a conceptual framework and a package of measures Secure and process institutions of organised sports
BUCOVINA	The area has a diversity of natural tourist resources and cultural assets of a great historical, architectural, and artistic value, that distinguish it from other areas. The coordination of development of tourism within the area is assured by the County Council, where exists a department for tourism. A main role is played by local SMEs and Destination Management Associations, constituted as PPPs: Bucovina Tourism Association, Vama, Sucevita a.o.	In 2009/2010 was formulated the strategic directions for development of Suceava County, Bucovina Area. The vision of the Bucovina Tourism is: To be the internationally well known, leading destination for responsible tourism in Romania which keeps economic growth in balance with the need to preserve the natural and cultural heritage of the Bucovina. The mission statement: To create by internal marketing activities an informed participation of all relevant stakeholders, an informed society, which is aware of the benefits of tourism and the responsibilities they have to ensure a sustainable tourism development, Other issues covered by the mission statement are: • Education and further training of employees • Services for SMEs, the backbone of the tourism industry • Marketing strategy to position and promote the	The tourist products within Bucovina are developed for the following types of tourism: 1. Cultural Tourism. 2. Rural Tourism 3. Treatment and Health Tourism 4. Business tourism 5. Active, mountain and nature tourism. The tourist products are combining the main assets of Bucovina: nature and culture: round trips to monasteries, life in rural area, active tourism in nature resorts. The tourists are either transiting Bucovina for 1-2 days, for visiting the painted monasteries, or are staying longer for relaxation in the nature, for active activities in rural area.

REGION	TOURISM INITIATIVES	TOURISM STRATEGIES	TOURIST PRODUCTS
		unique tourism offer on selected source markets in Romania and abroad in cooperation with NTO • Interregional cooperation with neighbor counties. Objectives express in more detail what should be achieved on which field when. We have to differentiate between more general qualitative and quantitative objectives. Following some qualitative objectives as example. Objective 1: To ensure favorable framework conditions for the tourism business development Objective 2: To implement private sector and PPP tourism institutions which are able to contribute to effective destination marketing. Objective 3: To ensure a high quality standard of the tourism offer. Objective 4: To improve quality of human resources in management and on the ground. Objective 5: To achieve an increase in revenues of the companies of the private sector. Objective 6: Improve business results for companies in the private sector, especially for SMEs	
MAŁOPOLSKA	EU LEVEL. Work is based on objectives aimed at improving quality, competitiveness and sustainability in	I Priority – Tourist products characteristic by high competitiveness • Business tourism	*The basic tourist products which should be supported are following:* • *Business tourism (conferences, congresses,*

REGION	TOURISM INITIATIVES	TOURISM STRATEGIES	TOURIST PRODUCTS
	European tourism and its enterprises, and at looking after tourists' interests. These Community schemes have an important influence on the development of the tourism industry, on the interests of tourists, and on the development and preservation of the natural and cultural heritage. National Level. Taking into account the development of tourism, the most important areas of the National Development Strategy are investments and supports for tourism (Second Priority – Improvement of the condition of the technical and social infrastructure). In order to function and compete on the tourist market, Polish towns and cities must gave a rich range of services which require creation extension of buildings of the following bases: accommodation, gastronomic, conference bases, recreation and entertainment infrastructure. Moreover, construction of tourist and recreation buildings is expected in health resorts, as well as development of post –industrial and post – military buildings and lands for tourist purposes. Complex tourist routes will be developed, understood as a group of accommodation, gastronomic, information infrastructures and accompanying infrastructure, concentrated around tourist attractions.	• Urban and Cultural tourism • Rural tourism • Recreational and active tourism • Cross-border and transitional tourism II Priority – Development of human resources in tourism III Priority – Marketing support • Tourism Information System IV Priority – Creating and development of space tourism Małopolska region Taking into account the development of tourism in Małopolska Region, the most important areas of the Region Development Strategy is regional landscape and heritage (Second Priority – Social development and standard of living). In this area we can notice few policy priorities: • Protection and enhancement of the cultural landscape • Preservation of bio and geo – diversity • Protection of the cultural heritage of the region • Regeneration of degraded areas	*business travel)* • *Religious tourism* • *Health tourism (wellness &spa)* • *Urban and Cultural tourism* • *Rural tourism (agrotourism, ecotourism)* • *Recreational (sun and beach, mountains, lakes, other natural areas and hiking) and active tourism (sailing, windsurfing, kite surfing, winter sports, cycling, horse riding)* • *Cross-border and transitional tourism* *Products of Małopolska tourism* *I area: Urban and cultural tourism* *II area: Religious tourism* *III area: Recreational and active tourism in Małopolska:* *IV area: health tourism (wellness and Spa)* *V area: rural tourism* *VI area: business and congress tourism* *VII area: Cross-border and transitional tourism*

REGION	TOURISM INITIATIVES	TOURISM STRATEGIES	TOURIST PRODUCTS
	Development Strategy 2007-2015. The document Directions for Tourism Development 2015 defines the main goal of strategy: creation of legal, institutional, financial and human resources conditions for the development of tourism		
PODKARPACKIE	The Podkarpackie Region Development Strategy for 2007-2020	The main goal of strategy is to increase domestic and international competitiveness of the region's economy through increased its innovation. Priority 4 – Tourism as a social and economic factor for the development of Podkarpackie Action: Improving the competitiveness of the tourist product Action: Development of regional tourism marketing Action: Strengthening cooperation between various tourism actors Action: Improving qualifications and skills of tourist personnel in the region Priority 6- International cooperation Action: Cooperation for tourism development, protection and exploitation of cultural heritage Action: Preservation of valuable areas of landscape in	• *Development of new brand touristic products: "Blue San" water route, Przemyśl Recreation and Sports Park, Sanok Cultural Heritage Park and other projects created by local leaders and non-profit organizations, "Carpathian Troy" – archaeological heritage park in Trzcinica.* • *Creation and promotion of touristic routes: international touristic route devoted to famous Polish writer "Tracing Aleksander Fredro", international tourist trail "The Petroleum Route" connecting places related to the birth and history of the oil industry, regional "The Pope John Paul II Trail", „Museums of the Beskids – Cross-border Bicycle Trail".* • *Organization of cultural events and festivals.*

REGION	TOURISM INITIATIVES	TOURISM STRATEGIES	TOURIST PRODUCTS
		region The document define the priorities: I Priority – Tourist products II Priority – Human resources III Priority – Space and landscape IV Priority – Marketing and promotion V Priority – Institutional support	

Table 9 – Initiatives and strategies

All the regions have a public or private body (at national or regional level) responsible for the development and promotion of tourism.

In terms of initiatives, all regions show strategies and programmes to develop short, medium and long-term plans that support the tourism business development. Some of the common points to all the strategies are:

- Tourism is understood as a social and economic factor for the regional development.

- Tourism must preserve the natural and cultural heritage.

- Tourism must promote the strengths of the territories: nature, culture, rural life, traditions...

MAIN TYPES OF TOURISM

TUSCANY

NATURE AND SPORT

This segment of tourism sector offers great possibilities of development, as it can be deduced from the tourist demand and from motivational surveys carried out in the past years and, above all from the presence of many nature reserves. Among the new values, which turned out to have a greater importance on the international markets, the climate and ecological issues connected to it seem to have acquired the priority in wide segments of the tourism market. In addition to this, a higher level of "ecological" awareness nowadays appears to be able to have an influence on the memory of consumers and their ability to associate produce and the territory where it comes from.

BEACH TOURISM

This segment is still considered the main occurrence of mass tourism. This typology of tourism is characterized by a progressive reduction of the average time spent on vacation and by a growing competition on the international markets.

On this scene the predominant behaviours of the demand are:

- The reference to less and less exclusive trilogy “sun, beach and sea”
- A more and more explicit search for a personalized offer
- The demand for multiple accommodation solutions, with adapted qualitative standards
- The greater sensibility towards services and infrastructures, in addition to the channel of the tourist intermediation for the foreign demand.

TOURISM OF ART AND CULTURE:

The identification of the profiles of cultural visitors is a fundamental step in creation of artistic and cultural products that are placed effectively on the market and that they are at the same time respectful of the cultural atmosphere in which they belong. In particular, we can distinguish several segments of cultural visitors:

- The cultural tourist type staying in the Tuscan towns
- The visitor who arrives from a nearby tourism location
- The visitor interested in art exhibitions or the cultural manifestations of miscellaneous kind
- The tourist searching for small villages, agricultural tourism, older traditions, etc.

FOOD AND WINE TOURISM

The enogastronomy is not considered a complementary service any longer; on the contrary, it gradually became “an objective” for tourists.

It is not any longer a niche phenomenon, but rather a cultural trend. Certainly the development of the farm holidays, the food, oil and wine tasting, and also the development of manifestations allowed a strong promotion of the offer and valorisation

of the region. It is a segment that contributes to the elevation of a quality, by attracting a growing flow of tourists with a good financial position and great motivations.

SPAS AND WELLBEING

On a strictly individual level, the search for wellbeing seems to be a dominant element, together with an increase request for healthier ways of living which involves all the population, regardless of age and income. Health Centres, Fitness clubs, hotels with sports facilities and dietary centres are the witness for this evolution, which involves new ways of tourism.

BUSINESS TRAVEL

This segment of the tourism has its own peculiar characters: the congress tourism market consists of a series of various events such as conferences, seminars, business and political conventions, meetings. The demand and the requirements of the congress tourism, which we need to address properly, are:

- Adequate accommodation and conference facilities
- Easy accessibility
- Efficient connections with other regions
- Other tourist assets (sport and culture)

SEENLAND ODER SPREE

NATURE

Brandenburg is a state with the highest percentage of surfaces of water in Germany. In general Brandenburg has a great landscape to offer. The local region has thirteen large nature reserves to offer including national parks, biosphere reserves and wildlife parks. The nature- and adventure tourism are one of the most important sectors of the tourism market in Brandenburg. It is possible to do water sports like water-ski or canoe, to bicycle or to hike. The bicycle tourism has become a national level of awareness, because of the well-developed cycle track net and attractive long distance cycle routes, like Berlin-Copenhagen or Oder-Neiße-cycle route.

WATER SPORTS

The aims of the water sports development are:

- Complete and supplement the legacy water routes
- Support the human powered sport activities
- Definition of districts and routes
- Support regional initiatives
- Develop a conceptual framework and a package of measures
- Secure and process institutions of organised sports

Service providers of the region are involved; they got the chance to announce relevant projects, developments and project ideas. There are 10 touristic service providers in the sphere of water activities. It's possible to rent jollyboats, pedal boats, rowboats, canoes, surf bikes, motorboats, sailboards and surfboards.

CULTURE

The culture tourism is important as well, because of historical cities like Potsdam and their castles, manors and the Prussian history. The combination of different active- and nature offers is important for product strategies and the development of the tourism in Brandenburg. The region has 16 castles and manors, 6 buildings of interest, 28 churches and convents, 30 theatres and culture centres.

WELLNESS

Other relevant topics for the tourism in Brandenburg are Wellness/health tourism.

Seenland Oder-Spree focuses on the health resorts Buckow, Bad Freienwalde and Bad Saarow. Service providers concentrate on prevention and relaxing offers. Furthermore, it will be verified, that those health resorts are accessible for all.

The numbers of 'Wellness' providers are limited: 4 therapy centres and clinics, 1 special clinic that gives advice and support to pregnant women.

BUCOVINA

The tourist products within Bucovina are developed for the following types of tourism:

CULTURAL TOURISM

In Bucovina, culture, history and religion are so closely interweaved. Monasteries, fortress, building civil history and museums, are part of the cultural tourist offer of Bucovina.

Cultural Tourism is one of the main types of tourism in Bucovina, and has as strengths the existence of 7 UNECO monuments - the painted Monasteries of Moldavia – and a very good network of handicrafts, as well as keeps traditions and customs. The authenticity of rural life is an important point too.

RURAL TOURISM

Bucovina has high percentage of rural areas and the supply of rural establishment is wide. That's why Bucovina offers alternative activities to do in rural areas: working on a farm, animal breeding, handicrafts...

Rural tourism is well developed in the villages of Bucovina, where the accommodation is assured by new cottages but also by the local population that start small businesses in rural area. The density of rural life and the rural authenticity makes Bucovina a significant destination for rural and agrotourism.

TREATMENT AND HEALTH TOURISM

The spa-town Vatra Dornei is at the confluence of two rivers, Dorna and Bistrita Aurie, in exquisite natural scenery. The mineral water in the region was first analyzed in 1806, and in 1845 the first spa establishment was built.

Vatra Dornei Treatment Resort is one of the significant of Romania. The standards are good and the treatment base is a 4 star one. Despite this fact it is still room for improvement in order to rich the international and European standards in wellness, treatment and spa tourism.

BUSINESS TOURISM

It is supported by 4 stars hotels within the area, they are striving for the development of the MICE sector (meetings, incentives, conferences and exhibitions) in Bucovina.

ACTIVE, MOUNTAIN AND NATURE TOURISM

It is the main strengths of Bucovina due the beautiful nature of the area, mountain landscape, good network of activities as hiking, Nordic walking, river rifting, off road, nature observation. In Bucovina are many nature reservations, as Calimani Nature Park.

Bucovina area has a diversity of natural tourist resources and cultural assets of a great historical, architectural, and artistic value, that distinguish it from other areas.

The beauty of nature and the peace of the places, the kindness of its inhabitants, confer to the tourists reasons to come and to stay here, to enjoy the peaceful atmosphere of the region.

In tourism centres in rural area, the leisure offer is represented by its last (but most important for Romania) component: sport and active tourism.

In Suceava are a lot of possibilities for having nature pure:

- Hiking. There are good conditions in favour of mountain hiking: the moderate height, the beauty of the landscape and numerous paths with easy slopes for hiking.
- Mountain bike riding
- Mountain climbing
- Rafting
- Paragliding
- Horseback riding

- Winter sports

MAŁOPOLSKA

ACTIVE TOURISM

Małopolska winter is home to quite a few skiing centres, tens of slopes, and hundreds of pistes and ski lifts. The season usually starts already in November, and ends in May. Some Małopolska ski resorts are at the same time spas that offer a wide range of health and wellness services.

At other seasons can be practiced rafting, canoeing, and riding.

CULTURAL TOURISM

The historic centre of Cracow, the former Nazi death camp Auschwitz-Birkenau, the sanctuarie Kalwaria Zebrzydowska, the Salt Mine in Wieliczka, the Wooden Architecture Route, are some of the Małopolska tourist sites.

AGROTOURISM

Agrotourism farms can be found all over Małopolska. Holidays on a farm provide numerous attractions, first and foremost of which is trying healthy homemade foods. Agrotourism is also recreation: selected farms offer angling, horse riding and hunting.

RELIGIOUS TOURISM

The domes and spires of churches are most prominent in Cracow's cityscape. The churches of Małopolska and Christian traditions of the region reflect the piety of the locals and show what Christianity was and is to Poland, and how important pilgrimages, which are inscribed in Christianity, are for visitors to Małopolska.

HEALTH TOURISM

In Małopolska, the most of the natural forms of treatments are offered by the region's sanatoria.

PODKARPACKIE

ACTIVE TOURISM

The Podkarpackie province is one of the few provinces in Poland, where it is possible to practice all kinds of winter sports. There are countless ski slopes of varying difficulty. There are numerous ice–rinks, and places where you can do classic and Scandinavian sledging and snowmobile. The season lasts from mid December until the end of March.

On the other hand, rivers and lakes of the Podkarpackie province are paradise for fans of almost all kinds of water sports. Other activities are: hiking, riding and flying.

CULTURAL TOURISM

Magnificent castles, wooden architecture sacral and laic, and military structures, are part of the cultural offer of Podkarpackie.

RURAL TOURISM

An agritourist farm in the Podkarpackie province are very experienced, they often host people with different expectations. It is a great opportunity to get to know life in the province, admire nature, and hear the stories about the village and the region. It is also possible to play artisan, and learn to make things like paper flowers, weave tapestry or make clay pots, taste the regional kitchen, but also get to know, how all the dishes are prepared.

HEALTH TOURISM

The great trumps of the Podkarpackie province, are the numerous mineral springs, discovered in 150 cities and towns, but only in four of those, in Horyniec–Zdrój, Iwonicz–Zdrój, Polańczyk–Zdrój and Rymanów–Zdrój they are used to heal people.

Table of main types of tourism by region

	NATURE	SPORTS	BEACH	CULTURE	RELIGIOUS	RURAL	FOOD	HEALTH	BUSINESS
TUSCANY									
SEENLAND ODER-SPREE									
BUCOVINA									
MAŁOPOLSKA									
PODKARPACKIE									

Table 10 – Types of tourism

According to the information collected the common types of tourism carried out in all the regions are:

- Nature/active tourism
- Culture tourism
- Rural tourism or agrotourism
- Health/wellness tourism

TOURIST ACTIVITIES DEVELOPED BY THE SMES

TUSCANY

In Tuscany, the main tourist activities developed by the SMEs are linked to accommodation.

- Hotels 3187
- Farmhouses: 4427
- B&B 1629
- Hotels 3187
- Room rental 3387
- Camping 269
- Holiday houses 1603
- Holiday apartments 226
- Residence 197
- Hotel Residence 270
- Historic Houses 108
- Villages 19
- Camper areas 13
- Alpine refuges 45

SEENLAND ODER-SPREE

Most of the service providers are under the umbrella ‘culture’. Thus, it can be said that culture dominates the supply considering activities in Seenland Oder-Spree. However, when looking at the main topic nature as it is communicated in the marketing strategy of Seenland Oder-Spree there are approximately 40 service providers (cumulating those under ‘nature’ and ‘water’) in this theme.

Nature	Water	Culture	Wellness
26 Service Providers	10 Service Providers	80 Service Providers	5 Service Providers

Out of this service provider structure, several activities can be derived. These activities can be made 'experiencable' with the products listed in the table above. However, a real holiday experience can only be made when combining those activities. Furthermore, combining products out of each topic will bring an added value for all service providers in the region.

BUCOVINA

The tourism industry comprises some two million businesses, mostly SMEs, which account for about 5 % of both GDP and employment. In this sector, there is a growing trend towards concentration, strengthening the vertical integration of tourist services. This is particularly noticeable in the hotel sector and services which organize travel and transport. The tourism operators and travel agencies try to develop tourism programs combining following elements:

- Visit to monasteries
- Natural wonders
- Physical outdoor activities
- Traditional folk art and customs
- Wildlife activities
- The cultural products that generate the most interest are learning about the way of life of people from a different culture
- Tasting local cuisine
- Sites that are important to a country's history and
- Visit to historic buildings.

MALPOLSKA AND PODKARPACKIE

Dominating tourist activities developed by the SME's in Małopolskie and Podkarpackie regions constitute hotel, gastronomic, transport and travel agencies services.

Table of main tourist activities developed by the SMEs

TUSCANY	SEENLAND ODER-SPREE	BUCOVINA	MAŁOPOLSKA and PODKARPACKIE
Tourist accommodation establishments	Tourist accommodation establishments	Tourist accommodation establishments	Tourist accommodation establishments
		Travel agencies	Travel agencies
		Transport agencies	Transport agencies
			Gastronomic companies
	Active tourism companies		

Table 11 – SMEs activities

The information analysed from the regions shows that accommodation is the main tourist activity (for SMEs) in all the regions, followed by tourism operators and travel agencies.

INDICATORS

TOURISTS (OVERNIGHT VISITORS)

Tourism is defined as the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited.

The use of this broad concept makes it possible to identify tourism between countries as well as tourism within a country. "Tourism" refers to all activities of visitors, including both "tourists (overnight visitors)" and "same-day visitors".

Due to the objective of this report, the figures used below are referring only to **overnight visitors**, it means number of visitors using accommodation.

Tuscany

	Tourists (overnight visitors)
Data for year 2007	11.486.778

Table 12 – Tuscany Tourists in Tuscany

Seenland Oder Spree

	Tourists (overnight visitors)
Data for year 2007	1.837.360

Table 13 – Tourists in Seenland Oder-Spree

Bucovina

	Tourists (overnight visitors)
Data for year 2007	535.100

Table 14 – Tourists in Bucovina

Małopolska

	Tourists (overnight visitors)
Data for year 2007	2.830.461

Table 15 – Tourists in Małopolska

Podkarpackie

	Tourists (overnight visitors)
Data for year 2007	592.621

Table 16 – Tourists in Podkarpackie

Tuscany is the region with the highest number of tourist (overnight visitors). Małopolska and Seenland Oder-Spree are in the second and third position. Podkarpackie and Bucovina show similar number of tourists in 2007.

TOURIST DENSITY

The following section tries to analyse the tourist density in the regions studied, through the following indices:

- **Tourist density** shows the intensity of tourism traffic. It means the number of tourist using accommodation per 100 inhabitants.

- **Defert index** is a tourist function indicator which is useful to estimate a number of tourist using accommodation per square kilometre in a determinated area.

- **Charvat index** is a tourist base saturation rate which is useful to estimate a number of bed-places per square kilometre in an area.

Tuscany			
	Tourist density	**Defert index**	**Charvart index**
Data for year 2007	313,24	499,64	21,16

Table 17 – Tuscany indices

Seenland Oder Spree			
	Tourist density	**Defert index**	**Charvart index**
Data for year 2007	416,03	406,59	3,22

Table 18 – Seeland Oder Spree indices

Bucovina			
	Tourist density	**Defert index**	**Charvat index**
Data for year 2007	75	62,56	0,79

Table 19 – Bucovina indices

Małopolska			
	Tourist density	**Defert index**	**Charvat index**
Data for year 2007	86,70	186,42	4,2

Table 20 – Małopolska indices

Podkarpackie			
	Tourist density	**Defert index**	**Charvat index**
Data for year 2007	28,13	33,20	1,15

Table 21 – Podkarpackie indices

CONCLUSIONS

After analysing the data gathered by each partner the main conclusions per country are:

Currently, in Tuscany tourism industry still represents a growing sector under many aspects. The number of tourists visiting Tuscany has recorded an average +1,5% every year since 2000. Tourists are especially interested in the rich art heritage, the traditional culture and gastronomy.

Tourism in Seenland Oder-Spree shows a positive trend over the last 4 years, although the occupancy rate and tourism intensity are on a low level (below national even regional level). It is worth mentioning its specialisation in the development of many “active products” (water sports mainly)

In Bucovina the development of tourism seems to be stimulating other economic sectors as well as the development and modernisation of the regional infrastructures. Tourism is fostering the growth of the economic efficiency in all the sectors of activity. The promotion of traditions and the development of rural, cultural and nature tourism are the key points of the tourist strategies.

Małopolska is an attractive region for tourists, the main types of tourism carried out are: cultural, rural, health, active and religious. The number of visitors and tourists dropped about a 5% in 2008 in comparison to 2007, income from tourism dropped by 12% in 2008 in comparison to 2006. There are a lot of programmes and initiatives for regional and local tourism development in Małopolska

Podkarpackie seems to be the less developed tourism region. In fact, the potential of this area is not fully exploited. It is worth mentioning that tourism is seen as a key for the regional development. Main types of tourism development in Podkarpackie are: cultural tourism, rural tourism (agrotourism), health tourism and active tourism.

To compare the information collected must be taken into account that the regions have different characteristics (geographic, climate…) and size (surface, population…) that in some cases make difficult a comparison.

Regarding infrastructures, it is a significant determinant of tourism inflows into a destination. All the regions show a good network of roads (national or international) that facilitates the access to tourism (national and international). Concerning the means of transport, all of them have good connections by train and bus and all (except Bucovina) have an airport with international connection.

There are public or private bodies (at national or regional level) responsible for the development and promotion of tourism in all the regions. In terms of initiatives, all of them have strategies and programmes to develop short, medium and long-term plans that support the tourism business development. The main common points to all the strategies are:

- tourism is understood as a social and economic factor for the regional development.
- tourism must preserve the natural and cultural heritage.
- tourism must promote the strengths of the territories: nature, culture, rural life, and traditions...

Focusing on tourism sector, Tuscany has the highest tourist accommodation capacity (highest number of beds in hotels and similar establishments and on campsites), followed by Małopolska and Podkapackie in Poland.

Within accommodation the figures reveal the **importance of farmhouses and agrotourism accommodation** in all the regions (except in Germany where this data is not available).

The information analysed from the regions shows that the main types of tourism commonly developed in the 5 regions are:

- Nature tourism (sports and active)

- Cultural tourism
- Rural tourism (agrotourism)
- Health and Wellness tourism

Accommodation is the main tourist activity (for SMEs) in all the regions followed by service providers (active tourism mainly), gastronomy and tourism operators.

According to the indicators, they are based mainly on the size and population of the regions, therefore the strong differences among the regions of study should be considered. In general, the higher are the indices, the more important is tourism's role in the economy of the regions.

Analysing the indicators collected, Tuscany **is the region that received more tourists (overnight visitors) in 2007**, followed by Małopolska. It was easy to predict due to different reasons:

- Tuscany is the biggest region (surface area) in this comparison
- Its natural and cultural/artistic heritage as well as a long tourist tradition
- A good organisation of tourist activities in the region.

Seenland Oder-Spree is the region with the **highest tourist density** followed by Tuscany. Although Tuscany has the highest number of tourists and population this indicator shows that the intensity of tourism is stronger in the German Region.

Tuscany shows the highest Defert index followed by Seenland Oder-Spree, it is due to Tuscany is the biggest region analysed as well as the region receiving more tourists (using accommodation). It's worth mentioning that Seeland Oder-Spree shows a high index in spite of it is the smallest surface area.

Concerning Charvat index, Tuscany has the highest index followed with a big difference by Małopolska. It is understandable considering the size of Tuscany and the long tourist tradition that means a big number of bed places (486.351). It should be mentioned that in Poland the agrotouristic accommodation is not included for the calculation of the the beds places (according to the country statiscals), so it means that if this figures were considered the Polish indices would be higher.

After these previous conclusions and in order to focus the appropriate approach for the transfer of the "bench-effect" method (main purpose of this report), it is necessary to identify the basis for the selection of successful benchmarks from Tuscany to the other regions.

Tuscany region was identified as a succesful example in the conception of Benchtour project, this report shows some figures that confirm the relevance of tourism in Tuscany.

To conclude, it is suggested to focus the selection of benchmarks in Tuscany on **nature and culture tourism** and **specifically in the sectors accommodation and gastronomy (restaurants),** as common points of interest for all the regions as well as considering the European trends that confirm that accommodation followed by restaurants are the most representatives activities in the tourism industry in Europe with more than 9 million people employed in 2007 (according to EUROSTAT) which is equivalent to 4.2 % of all people employed.

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