

**Universitatea de Științe Vieții “Regele Mihai I” din Timișoara**



**FACULTATEA DE MANAGEMENT ȘI TURISM RURAL**

**Drd. PEEV-OTIMAN Paula-Diana**

# **TEZĂ DE DOCTORAT**

**Conducător de doctorat**

**Prof. Univ. Dr. MATEOC-SÎRB Nicoleta**

**Timișoara  
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**CONTRIBUȚIA TURISMULUI RURAL LA DEZVOLTAREA  
DURABILĂ A BANATULUI MONTAN. STUDIU DE CAZ  
CLISURA DUNĂRII ȘI VALEA ALMĂJULUI.**

**Conducător de doctorat**

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**FACULTY OF MANAGEMENT AND RURAL TOURISM**

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# **PH. D. THESIS**

**THE CONTRIBUTION OF RURAL TOURISM TO THE  
SUSTAINABLE DEVELOPMENT OF BANAT MOUNTAIN  
AREA. CASE STUDY OF THE DANUBE GORGE AND THE  
ALMĂJ VALLEY**

**Ph. D. Supervisor**

**Prof. Univ. Dr. MATEOC-SÎRB Nicoleta**

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## SUMMARY

### **Current state of knowledge**

In order to achieve the proposed objectives of this paper, we initially conducted the study and analysis of extensive bibliographical sources. From the studied bibliography we selected and considered the data related to the researched topic in order to deepen the proposed analysis from more than 250 bibliographical references. We have used objective analysis of the problems, opportunities and tourism context of the area delimited for research. To this end, we have carried out **an analysis of the economic and social situation of Caras-Severin county**, in the national and regional context, and we have identified the natural, historical and cultural heritage that underlies the development of sustainable forms of tourism in the areas of the Danube Plain and the Almăj Valley, areas with great natural potential in terms of local tourism development and the creation of new jobs for the local population.

### **Delimitation of the area under investigation - Mountain Banat, Caras-Severin County, Romania**

In order to delimit and prioritize the tourist areas of the mountain Banat we proceeded, first of all, to the inventory and knowledge of all the components of tourist potential, their grouping in space and then their quantitative and qualitative evaluation in order to establish the development opportunities, the forms of development they can generate and the necessary equipment for the management of these resources in efficient and competitive conditions.

### **Current state of the economy of Caras-Severin county, with particular reference to tourism**

Caras-Severin County has a surface area of 851976 sq. km, making it one of the largest counties in the country, ranking third after Timis County (869,665 sq. km) and Suceava (855,350 sq. km). Geographically, **Caras-Severin county is the "most mountainous" county in the country**, with more than 80% of its surface area in the mountainous area, according to the regulations for the classification of Administrative Territorial Units (UAT) in the mountainous area. The mountainous structure of the county, conferred by the mountain massifs, most of them of medium and low altitudes (Semenic, Muntele Mic, Almăjului Mountains, Loevei Mountains, etc.) and their mineral wealth have favoured, over time, a complex economic development of mining, metallurgy, iron and steel, fruit-growing, agro-pastoralism, tourism, etc.

The massive structural changes in the county's economy (predominantly industrial, but largely mono-industrial before 1990) after 1989 caused significant reductions in the employed population, **with Caras-Severin county having one of the lowest employment rates, in contrast to one of the highest shares of unemployed and retired people in the country**. At the same time, Caras-Severin county "exports" (among) the highest number of young and middle-aged women to care for people at home, in Austria, Italy, Germany, etc. More than 6000 women in the county work (monthly) in care abroad, and the effect of this phenomenon of "exporting" Caras-Severin is what gives the county the second highest level of school dropouts in the country (3.4%).

The active population of the county, according to statistics provided by the INS, has the following occupational structure: agriculture, forestry, fishing 28%; industry 24%; administration, health, education 12.5%; trade 12.0%; services 8%; construction 7%; transport-warehousing 6%; **tourism, hotels, restaurants 2.5%**. The extremely high share of the population employed in agriculture (for a non-agricultural county such as Caras-Severin), almost one third of the county's active population, is, in my view, questionable, given the main characteristic of the county's agriculture, mainly subsistence and semi-subsistence.

In Caras-Severin county, according to the latest statistical data, the number of employees is 54,400, i.e. 19.8% of the total population of the county, and 70.0% of the active population - 77,700 employees + declared farmers (INS, 2019). A simple calculation shows that the working population (wage earners and declared farmers) represents only 28.3% of the total population of the county (275.2 thousand inhabitants), although the potential working population of the county is 150.2 thousand inhabitants (54.5%, between school age and retirement age). From these data, an alarming demographic and employment conclusion emerges for Caras-Severin county, **as it has one of the lowest employment indicators in economic and social activities**.

Another worrying demographic phenomenon for the general economy of the county is depopulation, both urban and, especially, rural. In the period from 2007, from the time of EU accession to the present day, the county's

population has declined, through migration (mainly external) and naturally, by 70700 inhabitants (346.9 thousand in 2007; 275.2 thousand in 2021). There are many reasons for this negative demographic phenomenon, but the main ones are **the particularly low overall level of economic development, due to the absence of a strategy in line with the county's potential, caused by poor economic and social conversion**, and, in particular, the existence of successive county administrations (in almost all terms of office after 1990) that have been poor in every respect: conception, involvement, concern, cooperation and collaboration with central and local authorities, etc.

The place of Caras-Severin county in the Romanian economy and its level of economic development - with special reference to tourism development - are presented through the following synthetic economic indicators: **county GDP; GDP/inhabitant; foreign investments and county exports for the period 2017-2019**, in the national and regional context (V-West Development Region).

From an economic and social point of view, in Caras-Severin county, unfortunately with maximum negative effect, the vicious economic cycle is manifesting itself: **poorly developed economy → economic underemployment → even more poorly developed economy → ...etc.**

In terms of overall economic development, Caras-Severin county is among the least developed counties in the country.

In terms of **gross domestic product per capita**, the main synthetic economic indicator that expresses the yield or average productivity of the employed population, Caras-Severin county is on the 21st place in the top of the counties, 8879 €, compared to 10666 € national average or 15344 € Timis county, NSI-2019 data.

The **poor economic position of Caras-Severin county** can be explained by the extremely poor economic and social reconversion after 1990, the lack of attractiveness for investors, both Romanian and foreign, and the low contribution of the county's economy to Romanian exports.

A county such as Caras-Severin, with such a high range of natural resources (wealth) and an exceptional tourist offer, **attracts "negligible" amounts of foreign investment**, about 200 million € / year, compared to 4386 million € in the neighboring county of Timis and 1965 million €, the national average (ten times less, compared to the average of the country's counties, data 2019).

Regarding **the annual export of goods**, Caras-Severin county is also ranked 30th among the counties of the country. Caras-Severin county exports in a year products of 360 million €, against 6226 million €, Timis county or 1643 million €, the national average (data year 2019).

In the regional context (Region V-West), Caras-Severin county is positioned at the lowest level for all economic indicators. The economic and social situation of Caras-Severin county, seen in the context of Region V West, in the national context, as well as the general economic situation of Romania, analysed in the South-European regional context, lead us to a conclusion that calls for a deeper analysis of the causes of the precariousness of Romanian tourism, in general, and that of Caras-Severin county, in particular.

### **Methods used in researching the current level of tourism development in Caras-Severin County and in Romania**

#### **Analysis of tourism activities in Romania and in mountainous Banat (Caras-Severin county)**

From the comparative data (pre-pandemic data, 2017-2018-2019) of the South-Eastern European countries (Romania, Bulgaria, Croatia, Slovenia and Serbia), **it appears that the overall tourism activity (qualitative and quantitative) of Romania is far below the level of the competing neighbouring countries, as well as below the natural potential offered by our country**. Although all three EU Member States (Bulgaria, Croatia and Slovenia) have much smaller surface area and population, and GDP per capita below Romania's level (except Slovenia), they have double the tourism intensity (Bulgaria and Serbia) or 3.5 times more than Slovenia and 6.4 times more than Croatia. Even Serbia, a non-EU country, which was left landlocked after the dissolution of Yugoslavia, has tourism activity indicators well above Romania's level.

In the county context, according to the data provided by INS (2017-2019 average) on total tourist arrivals, of which foreigners, there is an extremely high county dispersion, at national level.

Based on the tourist intensity data presented above, on the geographical map of the country, we have also outlined **a map of the zonal tourist development in Romania**.

The indicators that lead us to assess the general state of Romanian tourism, including that of Caras-Severin,

as emerging are: tourism intensity (number of tourists per 100 inhabitants) and the share of foreign tourists in total arrivals, since even the most intense Romanian counties and tourist areas do not "come close" to neighbouring and competing countries: Croatia and Slovenia. Even Bucharest - Romania's capital - (111.2 tourists/100 inhabitants), where most business, scientific and diplomatic tourism is concentrated, has a tourist intensity below the average of Bulgaria (131) and even Serbia (128). The only counties with a higher tourist intensity, close to that of Slovenia and above the average of Bulgaria and Serbia, are Constanța (204.9 tourists/100 inhabitants), with summer tourism on the Black Sea coast mainly for Romanian tourists, and Brașov (257.4), particularly for winter tourism (skiing), but also for rest and hiking in summer.

In terms of the **share of foreign tourists**, Romania's situation is even more precarious (even dramatic), well below the level of neighbouring competing countries. In terms of **foreign tourist arrivals**, Romania has the worst results in the EU.

This leads to the conclusion that **the main factor of tourist attractiveness, although significant, is not the country's natural potential, but the way in which the requirements of efficient and civilised tourism are ensured: the tourist framework, hospitality, infrastructure, including the financial factor.** Suffice it to say, as an argument confirming the above statement, that the counties regarded as the most attractive for tourism: Brașov, Constanța, Sibiu, Bihor, Valcea, Suceava, Maramureș, including Caras-Severin county, record a very low number of foreign tourist arrivals. And, if we refer to the share of foreign tourists in total tourist arrivals, the figures of the tourist counties are still unworthy to qualify them as the most important tourist counties of the country (Brașov 13.4%, Prahova and Maramureș 13.1%, Tulcea 12.3%, Suceava 12%, and Constanța 4.8% and Caras-Severin 3.4%).

The highest shares of foreign tourist arrivals are recorded in counties (and cities) with strong economic, administrative and university potential, where, in fact, the main forms of tourism are business, scientific, academic and diplomatic (in the case of Bucharest). In this category, the counties of Iasi (18.3%), Cluj (20.3%), Timis (30.4%) and, obviously, the country's capital, Bucharest (56.3%) fall into this category.

In summary, analysing the data on tourist arrivals in Romania (total, of which foreigners), receipts resulting from the number of overnight stays and the contribution of tourism to GDP, the following conclusions can be drawn regarding the current state of Romanian tourism in general and mountain tourism in Caras-Severin:

- the current (strategic) conception and development of Romanian tourism is totally inadequate compared to the requirements of modern, efficient and extensive tourism and Romania's exceptional natural tourism offer. The fact that Romania has about 2% of GDP revenue from tourism is the most telling figure that demonstrates our country's "tourism precariousness";

- on a national scale, on the map of the country, the level of tourism development is extremely dispersed. Of the approximately €4.5 billion in tourism receipts in Romania in 2019, more than half are concentrated in five counties (Constanța, Brașov, Bihor, Valcea, Prahova) and Bucharest. Each of these five counties has at least one area (point) of major tourist attraction, such as the coastline in Constanța, Băile Felix in Bihor, ski areas in Brașov, the Olt Valley and monasteries in Vâlcea, the Prahova Valley in Prahova.

- the country's tourist counties: Maramureș, Suceava, Tulcea, Sibiu and Caras-Severin, although they have exceptional natural (and to some extent also man-made) tourist offers, contribute only 17.1% (551 million lei of Romania's tourist receipts). Although these counties have a substantial tourist offer: tradition in Maramureș; monasteries and the Dornelor region in Suceava - Bucovina, the Danube Delta in Tulcea, European Cultural Capital - Sibiu; Herculane Baths and the Danube Gorge in Caras-Severin, their exploitation is still far below potential;

- there are eight counties in Romania (a quarter of the country's counties) where tourism is practically non-existent from an economic point of view: Teleorman, Giurgiu, Călărași, Vaslui, Vrancea, Olt, Botoșani and Sălaj, with annual tourism receipts of less than 20 million lei (less than 100 000 overnight stays per year in the county);

- in view of the current level of tourism in Caras-Severin county (relatively good in terms of numbers, 90.1 tourists per 100 places), which ranks 10th in the list of counties, an important remark should be made about the distribution of tourists by tourist destination. Of the 244.6 thousand tourists registered in the period before the pandemic in Caras-Severin county, more than 50% went to the resort of Băile Herculane, 26% to the ski areas of Semenic and Muntele Mic and only about 20% to the other 25-30 forms and destinations of tourism in the Banat mountain area.

- Alarming for Caras-Severin county, **rural tourism and agritourism proper are practically non-existent**. Compared to Suceava and Maramures counties, agrotourism in Caras-Severin is very poorly represented.

Also, the **development of human resources for tourism** must be a priority in order to provide the quality services expected by the tourism market and requires a systematic approach to projecting staff needs and establishing the necessary training modalities to provide qualified staff in both the public and private sectors.

#### **Forms of tourism practised in the mountainous Banat (Caras-Severin county)**

In Caras-Severin county, various forms of tourism can be practised, developed around four basic natural areas and structures: i) **Banat Mountains, Tarcu Mountains, Little Mountain**; ii) **Danube Gorge**; iii) **the thermal mineral waters of Băile Herculane** iv) **the salt marshes of man-made lakes** (Secu, Breazova-Văliug, Gozna-Crivaia, Trei Ape, Poiana Mărului, Buhui, Mărghitaș, Lacul Mare and Lacul Micul (with water lilies) at Dognecea, Cerna Valley and Rusca-Teregova) and **natural lakes** (Ochiul Bei Lake, Dracului Lake and "Băile Vulturilor" cryonival lake) on the main rivers running through the whole territory of Banat: **Timiș, Caraș, Nera, Bârzava, Bistra and Cerna** [226].

In the area delimited for the research, seven well-defined **ethnographic zones** can be distinguished: **Timis Valley/Gugulan Valley; Nera Valley/Almăjului Valley; Danube Gorge; Caras Valley; Bârzava Valley; Bistra Valley; Cerna Valley**, each with specific ethnographic authenticity and tradition, which must be maintained and cultivated.

**The forms of tourism that can be practised in Caras-Severin county are:**

#### **Mountain tourism**

This is the main form of tourism in Caras-Severin county for those who love hiking, seek rest and recreation (relaxation), prefer fishing and hunting, try mountaineering and, above all, are passionate about recreational or sport skiing in the **mountain resorts of Văliug - Semenic -Gărâna and Muntele Mic -Nedeia (Țarcu)**. Mountain tourism is **increasingly assimilated to winter sports tourism**.

#### **Spa tourism**

This is the second form of tourism practised in Caras-Severin county, combining relaxation with various forms of cure and treatment. The main resort (even the only one in Caras-Severin county) with spa tourism is the **spa resort of Băile Herculane**, thanks to the multiple qualities of its 20 thermal springs.

#### **Cultural tourism**

This is the form of tourism that places the cultural attraction at the heart of the offer. In Caras-Severin, cultural tourism is distinguished by different (sub)forms, depending on the main categories of cultural tourist attractions. Each form of cultural tourism is made up of **cultural heritage assets** and **cultural events**: **cultural tourism - historical, cultural tourism - architectural, cultural tourism - museum, cultural tourism - scientific, cultural tourism - religious, cultural tourism - industrial, cultural tourism - ethnographic and folklore, cultural tourism - artistic, cultural tourism - ethnic, cultural tourism - itinerant**.

Caras-Severin county, like the whole of Banat, is unique in the Romanian and European area, being the place where an **interethnic multicultural and interfaith model** has been created in the true sense of the word. The 15 main communities of *Romanians, Germans, Hungarians, Croats, Serbs, Roma, Czechs, Slovaks, Ukrainians, Russians, Lipovenes, Turks, Bulgarians, Jews, Poles and Italians* make the Romanian Banat a region of European culture, considered "**Little Europe**", and a model of peaceful interethnic coexistence.

#### **Agrotourism**

Agrotourism in most mountain areas of Romania, including the mountain Banat, is more a potential than a reality. The potential for agritourism in mountain areas is generated by the beauty and tranquillity of the villages and rural households, the future equipment through land-use planning projects and rural settlements, the great variety of activities, characteristic of agricultural production, the attractiveness of the surrounding landscape, the villages and the farming traditions specific to each rural mountain locality. The expansion and generalisation of agritourism, however, requires a profound remodelling of rural infrastructure and the equipment of agritourism farms suitable for tourism. In addition to equipping agri-tourism farms and improving the rural infrastructure, the expansion of agri-tourism also requires promotional tourism management, the creation of tourist information networks to bring supply as close as possible to the demand for agri-tourism, and the promotion of this type of tourism as an educational form

of tourism for schoolchildren (and even city dwellers), who are not sufficiently familiar with 'country life' and the activities of agriculture, orchards, dairy farming, shepherding, rural customs and traditions, etc.

### **Restoration of ecological and tourist sites in the Banat mountains**

As tourists or researchers - attentive observers, we cannot pass without seeing and noticing some negative effects (not few) of anthropic activities (mining, industrial and agricultural, infrastructure and architecture, social), most of them coming from the communist period, but also from the last three decades, which, **besides the deep, unfavourable damage to Nature, constitute deep wounds, real obstacles, brakes in the present and future development of tourism in the Mountain Banat.**

The frequency, extent and persistence of anthropic activities with negative effects on the natural environment are referred to as "**ecological wounds**" and "**tourist ruins**", the "healing" and restoration of which requires **large-scale restoration projects**, i.e. effort, high costs and long time. We have focused our research on these realities of mountain Banat, because the vast majority of older and more recent research, scientific and literary writings (14, 27,39,54,55), projects, programmes and strategies drawn up by local, county and national public authorities (226) avoid, in whole or in large part, presenting the existence and consequences of ecological plagues and tourist wastelands on mountain tourism as well as ways of mitigating or removing them. Even the **Tourism Development Strategy for Caras-Severin County for the period 2022-2027** (92) does not contain a single word about them, as if they did not exist almost everywhere and nobody noticed them. It is, in my opinion, the most negative aspect of the tourism development strategy for the Charaş-Severin region.

The notion of **ecological plague**, which we encounter and use to describe the negative effects of anthropogenic activities (industrial, agricultural, mining, forestry, military, etc.) on the natural or built (built) environment, is less commonly used and encountered in scientific literature and not at all found in tourism literature.

In the field research of the natural and man-made tourist offer of the mountain Banat, in the two areas studied, the Almăjului Valley and the Danube Plain, which is particularly rich and attractive (especially the natural one), we were surprised to find, with a particularly high frequency, recent or older degradations, "black spots" of nature or of the built space, degraded and abandoned buildings, many of them monuments of nature or historical monuments, which negatively affect the quality of the offer and, at the same time, the tourist demand. And if they were singular or isolated cases, it is possible that I would not have been aware, but these **destructions, degradations, being frequent** (as is the case of the road of not even 60 km Oravita-Bozovici), **extensive** (or the case of the settlements in the Danube from the copper mining of Moldova Nouă and coal mining of Cozla), **visible** in Map 6, which violate the eye (as is the case of the Marila Sanatorium or the civic centre of Bozovici), led me to inventory and research them carefully. This new observation of the tourist offer in the territory sensitized me to develop their signalization and description in the specialized literature (scientific works, books, tourist guides, local and county strategies with tourist theme, etc.), but, big surprise, I did not find any reference, any word about the degradations of the natural and built environment (Map 6).

This is the reason that forced me to walk the main tourist routes of the studied areas, in order to assess their **presence, frequency, extent** and, above all, their **negative impact** on tourism in the mountain Banat. Given the fact that, in most cases, these "black spots" have caused degradation of the natural environment, biodiversity and buildings, constructed spaces, etc., I likened them to deep wounds, which I called "**ecological wounds**".

Knowing the **size, scale and extent** of the 9 major ecological plagues on the Danube Belt (Map 7) and the 12 major ecological plagues in the Almăj Valley and its neighbouring areas (Map 8), inventoried so far, we consider that their "removal" requires the preparation of a significant **number of greening projects**, the costs of which, without detailed technical and economic documentation, are difficult to estimate. We also appreciate that the greening of the affected areas, being a long-term activity, in my opinion, can take 10-15 years. Regardless of cost and duration, the greening operation must be started from scratch, because, to date, we have not come across even weak signals that their removal would be on the attention of the responsible local, county and national authorities.

We consider that inventorying and describing the impact on tourism in the mountain Banat in the framework of the PhD thesis and providing the responsible authorities with the research undertaken is the first step towards drawing up restoration and greening projects.

### **Comparative projections of tourism development**



In order to achieve the proposed research objectives we used **the case study method**

In order to research the current level of tourism in Caras-Severin county and in Romania and the dynamics of its development for increasing its contribution to the GDP of Romania and of the county, we processed the dynamic statistical series by analytically adjusting the following indicators:

1. - number of tourist arrivals;
2. - duration of tourist stay (days);
3. - value of annual tourism receipts (million lei);
4. - share of tourism in GDP (%);

Using regression functions of the form  $Y = f(t)$ , where the independent variable is  $t$ , the time interval of the dynamic series considered for a period of ten years (2011-2019, until the emergence and deployment of the pandemic, 2020-2021).

For the comparability of the state of tourism in Caras-Severin county, we took into study, adjusting the regression functions also for two other counties with relatively similar natural and anthropogenic conditions, namely Bihor and Suceava counties. Regression functions were also calculated for tourism in Romania.

After testing several forms of the regression functions, taken with Excel software, using correlation coefficients, the best fits resulted in the fact that at the current growth rate of tourism share in GDP of 0.11% [(3-1.9)/10 = 0.11; 1.9% GDP 2010; 3% GDP 2029], Romania can reach 6% (equal to Croatia, 2019) in 27.1 years (3:0.11=27.1 years).

Simulating the average annual growth of tourism in GDP, by doubling, tripling etc., Romania can reach 6% after 27 years, if the current average annual growth rate (0.11%/year) is maintained or after a decreasing number of years, depending on the average annual growth of the share according to the calculation below:

Specification	1	2	3	4	5	6
Growth rate, %	0,11	0,22	0,33	0,44	0,55	0,66
Number of years	27,10	14,00	9,00	7,00	5,50	4,90

Given the current and prospective growth conditions, we consider it rational to triple the annual rate (from 0.11%/year to 0.33%/year), which would lead to a 6% share of tourism in Romania's GDP within 9 years. (fig. 20)

Sustainable development of local communities has as major objectives: protecting the environment, fighting poverty, improving the quality of life, developing and maintaining a viable and efficient local economy.

Sustainable tourism involves making optimal use of resources (including biological diversity), minimising negative economic, socio-cultural and environmental impacts, maximising benefits to local communities, national economies and nature conservation. As a natural consequence, sustainability also refers to the management structures needed to achieve these goals. Sustainable tourism covers all forms and activities in the hospitality industry, including conventional mass tourism, cultural tourism, business tourism, rural tourism, cruise tourism, religious and sports tourism, and urban tourism. The process of moving towards sustainability should normally be coordinated at national level by government authorities and supported by local authorities at community level.

**In conclusion, the forms and areas of tourism in mountainous Banat offer an extremely wide range of tourist activities that can be applied by tourists in Caras-Severin county, which are, in a word, of an exceptional potential. The number one problem of tourism in this area is, however, the implementation and development of this huge potential, which, we believe, is still too little used, as this research shows.**