This overview of the transport and tourism sectors in Romania was prepared to provide the information for the mission of the Transport and Tourism Committee to Romania (29-31 March 2016).

1. INTRODUCTION

Romania is one of the most populated countries in eastern Europe with around 20 million inhabitants\(^1\). Geographically, it is dominated by the Carpathian Mountains in the north and centre of the country while the main feature in the south is the vast Danube valley which becomes a delta as it approaches the Black Sea. This distinctive geography has a profound influence on the developmental challenges and opportunities of the country and its individual regions.

The Romanian economy closed out 2014 with 2.8% growth, down from the 3.4% recorded in 2013 which was higher than the EU-28 average of 1.3% and 0% in both years respectively\(^2\). Between 2004-2014, the Romanian economy grew on average by 2.7%. The most important sectors of Romania’s economy in 2014 were industry (27.3%), wholesale and retail trade, transport, accommodation and food services (17.9%) and public administration, defence, education, human health and social work activities (10.3%)\(^3\).

### Table 1: Macro economic forecasts for Romania

<table>
<thead>
<tr>
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<th>2015</th>
<th>2016</th>
<th>2017</th>
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</thead>
<tbody>
<tr>
<td>GDP growth (% year over year)</td>
<td>3.6</td>
<td>4.2</td>
<td>3.7</td>
</tr>
<tr>
<td>Inflation (% year over year)</td>
<td>-0.4</td>
<td>-0.2</td>
<td>2.5</td>
</tr>
<tr>
<td>Unemployment (%)</td>
<td>6.7</td>
<td>6.6</td>
<td>6.5</td>
</tr>
<tr>
<td>Current account balance (% of GDP)</td>
<td>-1.0</td>
<td>-2.1</td>
<td>-2.9</td>
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In 2009, the European Union (EU) Heads of State or Government, following a call submitted by Austria and Romania, asked the European Commission (EC) to prepare a strategy targeted at the Danube area. The European Union Strategy for the Danube Region (EUSDR), and its accompanying action plan, was adopted by the EC in December 2010 and endorsed by the European Council in 2011\(^5\). The European Parliament (EP), which had been calling for the strategy since 2008, backed the process through the adoption of a resolution in January 2010\(^6\). In February 2011, the EP adopted a second resolution in which it urged the quick endorsement of the EUSDR. It also asked to be kept informed and consulted on the status of implementation and updating of the strategy\(^7\). The EUSDR brings together 14 countries:

- nine EU Member States: Germany, Austria, Czech Republic, Slovakia, Hungary, Slovenia, Croatia, Romania and Bulgaria;
- three current or potential candidates for EU membership: Serbia, Bosnia and Herzegovina, as well as Montenegro;
- two countries covered by the European Neighbourhood Policy: Moldova and Ukraine\(^8\).

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1 European Commission - DG MOVE (Mobility and Transport) - Romania Country Scoreboard - Investments and Infrastructure.
2 Eurostat - File - Real GDP Growth Rate, 2014-2015.
3 EUROPA - Official Website of the European Union - Member Countries - Romania.
8 European Commission - DG REGIO (Regional Policy) - Macro-regional Strategies - The EU Danube Strategy.
The EUSDR addresses a wide range of issues which are divided among four pillars and 11 Priority Areas. Mobility and Multimodality, as well as Culture and Tourism, have been identified as key areas of macro-regional cooperation. Romania plays an active role in the implementation of the EUSDR by assuming the function of the coordinator of the following Priority Areas:

- Mobility and Intermodality of Inland Waterways (jointly with Austria),
- Culture and Tourism (jointly with Bulgaria),
- Environmental Risks (together with Hungary)\(^9\).

In August 2015, the EC adopted a new "Danube Transnational Cooperation Programme" designed to directly contribute to the successful implementation of the EUSDR through its thematic priorities and its support to the Strategy's governance. Boosting innovation and entrepreneurship, preserving the natural and cultural assets of the Danube region, improving the connectivity and supporting the shift towards a low-carbon economy will form the key focus of the new Programme. The EU will invest more than €202 million from the European Regional Development Fund (ERDF) and €19.8 million from the Instrument for Pre-Accession (IPA) for transnational projects in the Danube basin territory\(^10\).

2. TRANSPORT

Romania, due to its geographical position, is an important European traffic node for passengers and goods, facilitating connectivity throughout central Europe, the Black Sea and the Caucasian–Caspian area. However, its transport infrastructure is underdeveloped and outdated, which is a critical barrier to the country's development and economic growth. Although there have been some major transport investments, Romania still experiences accessibility and connectivity constraints in each mode of transport, that can be attributed in particular to poor quality of the road infrastructure, gaps in TEN-T connectivity between east and west of the country and the slow progress in railway modernisation. Administrative deficiencies in the maintenance and operation of the infrastructure have also been identified among the causes hampering the smooth functioning of the Romanian transport system\(^11\).

The ratings for the quality of infrastructure in Romania are quite low for all modes of transport\(^12\). Roads and railways are of particular concern as in this area Romania is ranked last out of EU Member States.

Transport by road remains the predominant mode of both passengers and freight in Romania. However, in the transport of goods, sustainable modes of transport such as rail and inland waterways jointly achieved nearly 42% market share in 2013. As far as passenger transport is concerned collective modes of transport such as buses and coaches, rail as well as trams and metro jointly provided services to nearly 24% of all transport users in 2013 (see Figures 1 and 2).

The transport sector in Romania employed over 300 000 people in over 34 000 enterprises in 2012, with nearly one third of them being employed by the road freight sector\(^14\). In 2013, it is estimated that private households in Romania spent just over €9 billion or roughly 10.7% of their total consumption on transport-related items. 22.5% of this sum (around €2 billion) was

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used to purchase vehicles, close to 60% (€5.4 billion) was spent on the operation of personal transport equipment (e.g. to buy fuel for the car) and the rest (around €1 billion) was spent for transport services (e.g. buses, trains, plane tickets).

Two multimodal core network corridors of the TEN-T cross Romania (see Map 1):

- **The Orient/East-Med corridor (OEM)** connects the German ports Bremen, Hamburg and Rostock via the Czech Republic and Slovakia, with a branch through Austria, then on via Hungary to the Romanian port of Constanta and the Bulgarian port of Burgas; with a link to Turkey, to the Greek ports Thessaloniki and Piraeus and a "Motorways of the Sea" link to Cyprus\(^{15}\). Its total length from Wilhelmshaven to Piraeus (based on the railway component) is around 4200 km, depending on the routing in Germany and the Czech Republic, and some 506 km or 12% run through the territory of Romania\(^{16}\). The main bottleneck is the railway section Timisoara (Romania) – Sofia (Bulgaria)\(^{17}\).

- **The Rhine-Danube corridor** connects Strasbourg and Mannheim via two parallel axes in southern Germany, one along the Main and the Danube, the other one via Stuttgart and Munich, and with a branch to Prague and Zilina to the Slovak-Ukrainian border, through Austria, Slovakia and Hungary to the Romanian ports of Constanta and Galati. In total, the road part of corridor has a length of 4470 km and the largest share is located in Romania. About 78% of the total length of roads in the corridor is classified as motorways and 22% is ordinary roads\(^{18}\). The key aim of the projects is to remove the bottlenecks along the inland waterways and the railway sections Stuttgart – Ulm and München – Freilassing\(^{19}\).

The roads included in both of the above-mentioned corridors overlap partially the Romanian section of the international road route: Via Carpatia\(^{20}\). The development of the TEN-T core network in Romania is in its first stages for all but inland waterways, which is 91% completed. Between 2007-2013, Romania has invested over €6 billion on TEN-T projects\(^{21}\).

**Map 1: TEN-T core network corridors (focus on Romania)**

![Map of TEN-T core network corridors in Romania](image)

On 25 February 2015, the Romanian Government adopted the General Transport Master Plan (GTMP)\(^{22}\) - a strategic document setting priorities for the development of the transport sector in Romania for the next 20 years and identifying

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\(^{15}\) European Commission - DG MOVE (Mobility and Transport) - Trans-European transport networks - TEN-T corridors.

\(^{16}\) European Commission - DG MOVE (Mobility and Transport) - The Orient/East-Med Core Network Corridor Study - Final Report, Dec 2014, p.70.

\(^{17}\) European Commission - DG MOVE (Mobility and Transport) - TEN-T Country Fiche for Romania.

\(^{18}\) European Commission - DG MOVE (Mobility and Transport) - The Rhine-Danube Core Network Corridor Study - Final Report, Dec 2014, p.47.

\(^{19}\) European Commission - DG MOVE (Mobility and Transport) - Trans-European transport networks - TEN-T corridors.

\(^{20}\) Via Carpatia is the shortest road route in the north-south axis allowing for seamless transit of passengers and goods between northern and southern Europe, with extension to Ukraine and Turkey. Its routing is as per the Łańcut Declaration II signed by the Ministers responsible for transport of Lithuania, Poland, Slovakia, Hungary, Romania, Ukraine and Turkey in Warsaw (Poland) on 3 Mar 2016.

\(^{21}\) European Commission - DG MOVE (Mobility and Transport) - Romania Country Scoreboard - Investments and Infrastructure.

\(^{22}\) European Commission - DG MOVE (Mobility and Transport) - Trans-European transport networks - TENtec Maps (focus on the Rhine Danube and the Orient-East Mediterranean TEN-T corridors that cross Romania).
projects and policies that are required in order to meet Romanian transport needs. As presented in the GTMP, Romania intends to invest in removing the main transport bottlenecks and in the development of sustainable, energy-efficient and green transport to increase the country’s competitiveness. Urban transport investments and the completion of the TEN-T core network are important priorities. The total value of projects identified in the GTMP amounts to around €45.5 billion, which includes investment projects in the transport infrastructure for the road, rail, air, sea and multimodal sectors\(^{24}\) (more information can be found in the following sections).

EU funds play an important role in the implementation of the transport goals identified at national level. The spending strategy of the resources allocated to Romania under European structural funds and cohesion policy has been elaborated by Romania in “The Large Infrastructure Operational Programme 2014-2020” (LIOP), which was adopted by the EC on 10 July 2015\(^{25}\). The total amount that Romania has available in the 2014-2020 programming period for the four sectors of transport (road, rail, water and multimodal) amounts to €6.8 billion\(^{26}\). It is expected that thanks to the implementation of the LIOP, Romania will be able to achieve its strategic targets in the transport sector, such as:

- the reduction of travel time on both road and rail TEN-T networks (to 74.1 min/100km and 79.2 min/100km respectively),
- a decrease of the number of road fatalities to 73 per million inhabitants,
- an increase of the freight carriage by inland waterway to 32.2 tons/year,
- a rise of the share of metro system in public passenger transport in Bucharest to 23%,
- a growth of the number of passengers handled in airports to 20 million/year and containerised cargo volume in intermodal terminals to 70 000 TEU.

Improving energy efficiency is one of the top priorities established by the energy strategy of Romania. It aims to ensure the security of supply to consumers, sustainable development and competitiveness and the reduction of greenhouse gas emissions (GHG), whilst saving energy resources\(^{27}\). Between 1990-2013, the country’s GHG emissions from transport have grown by 21.3% and have been increasing slightly faster than the EU average\(^{28}\). As a percentage of total GHG emissions across all sectors, Romanian transport accounts for 11.8% (2011 figures). Among the different transport modes, road transport is the source of the great majority of GHG emissions, being responsible for 93% of domestic transport emissions\(^{29}\). Romania is committed to a national 2020 target limiting GHG emissions to +19% for non-ETS sectors (including transport\(^{30}\)) compared to the 2005 level\(^ {31}\).

The share of women working in transport in Romania is one of the lowest in the EU\(^ {32}\). Private expenditures in research and development by transport companies in the country is far below the EU average\(^ {33}\).

a) Rail Transport

The Romanian network of rail lines open to commercial traffic is about 11 000 km long (the eighth largest in the EU). It is also in an advanced state of disrepair due to a chronic lack of maintenance. As a consequence, the rail system is very inefficient and it continues to deteriorate. The speed is limited to 50 km/h on almost a third of the network and to 80 km/h on another 40% (not to mention the numerous temporary speed restrictions). Since 1990, the length of the Romanian network has been reduced by 5%. This is comparable to Bulgaria (-5.3%) but lower than the EU-28 average (-7.8%) or the EU-12 average (-12%). This is also far below reductions in some Member States such as France (-10.2%), Germany (-18.2%) or Poland (-25%)\(^ {34}\).

The TEN-T (core and comprehensive) network covers some 20% of the total Romanian rail routes length (and accommodates about 50% of the total rail traffic by volume). EU standards for minimum speeds on the core TEN-T network will entail heavy upgrading work on those segments. Romania has adjusted 5% of its railway network to the TEN-T parameters\(^ {35}\) and is far below the EU average for the electrification\(^ {36}\).

\(^{21}\) Romania’s Prime Minister’s Office - Cabinet Meetings - General Transport Master Plan approved by the Government, 25 Feb 2015. The document requires approval of the national parliament. At the time of elaboration of this briefing latest draft available was dated July 2015 (only in Romanian language).

\(^{24}\) Romania’s Prime Minister’s Office - Cabinet Meetings - General Transport Master Plan approved by the Government, 25 Feb 2015.

\(^{25}\) European Commission - DG REGIO (Regional Policy) - Official Press Announcement of Commissioner Corina Cretu, 10 Jul 2015.

\(^{26}\) European Commission - DG REGIO (Regional Policy) - Programmes 2014-2020, Romania - Large Infrastructure Operational Programme.

\(^{27}\) The Official Journal of Romania - Resolution for the approval of the National Energy Efficiency Action Plan, Feb 2015, p.25.


\(^{29}\) The World Bank - Romania - Climate Change and Low Carbon Green Growth Program - Transport Sector Rapid Assessment, Jan 2014, p.22.

\(^{30}\) Aviation sector is an exception as it has been included in the EU ETS since 2012.


\(^{32}\) European Commission - DG MOVE (Mobility and Transport) - Romania Country Scoreboard - People.

\(^{33}\) European Commission - DG MOVE (Mobility and Transport) - Romania Country Scoreboard - Energy Union and Innovation.


\(^{35}\) European Commission - DG MOVE (Mobility and Transport) - Romania Country Scoreboard - Investments and Infrastructure.

\(^{36}\) European Commission - DG MOVE (Mobility and Transport) - Romania Country Scoreboard - Energy Union and Innovation.
In Romania, the degree of market opening of the rail freight sector is the highest in Europe, with 56.8%. However, for the passenger sector, the market share outside the principal undertakings is only 9.6%

From 2007 to 2013, EU funding (ERDF + Cohesion Fund + TEN-T) for Romania's railway reached €1.9 billion. This financing was entirely allocated to sections of a major rail route: the north branch (Constanta-Brasov-Curțici). The modernisation and development of the TEN-T core network routes will remain a priority. According to the Romanian Ministry of European Funds, the country has submitted three rail transport projects worth about €892 million to be financed under the Connecting Europe Facility (CEF). This includes €890 million for the modernisation of two railway sections (Brasov-Apata and Cata-Sighetu Marmatiei) and €2 million for two feasibility studies (relating to the Craiova-Drobeta Turnu Severin-Caransebeș (230 km) line and the Craiova-Calafat (108 km) line

The GTMP for Romania defines five operational objectives for the railway sector, which are:

- a radical reform of the system so that a sustainable framework for development is established,
- a need to focus the scarce maintenance and development resources on a reduced yet sustainable network,
- the establishment of a competitive and commercial framework for passenger operations,
- the establishment of a system for sound performance accountability,
- the improvement of management efficiency of the rail companies and thus the financial sustainability of the system

The GTMP allocates up to €14 billion for rail infrastructure investment, mostly for the renovation and upgrading of around 4 000 km of railway lines

b) Road Transport

In 2013, approximately 76% of passenger transport by land in Romania was passenger cars, with 80.4 billion pkm

Although there has been significant investment in recent years, the Romanian road network has insufficient capacity, making the movement of persons and freight slow and inefficient. Out of a network of some 84 000 km in 2012, motorways accounted for only 0.7% and national roads around 20.0%. Regional and other roads amounted to just under 80%

In 2012, Romania reported having 550 km length of motorways, yet its network was far from being completed

Investments made during the 2007-2013 programming period represent an important starting point for future interventions: the length of un-made roads has decreased by nearly 300 km, paved county roads decreased by over 2 200 km, while the asphalted medium and heavy type roads increased by 2 540 km. The main problems of the secondary roads network are a lack of ring roads in most towns and villages and the restricted carrying capacity (trucks of more than 20 tonnes are not allowed on the large majority) with direct effects on flows of traffic and freight. Insufficient and even inadequate signalling gives rise to large disruptions in the normal traffic flow with a high risk of accidents. There is also a high percentage of non-upgraded roads with bridges that are in immediate risk of collapse

Road accident fatality rates in Romania have been above the EU average since 2004. Although between 2001-2014 the country has reduced the number of deaths in road accidents by 25.8% (an average of -2% per year), the pace of reductions was the slowest among all EU-28 Member States. Negative trends in drink-driving deaths (an increase of around 23%) have contributed to slowing down the progress in reducing road deaths. With 91 fatalities on the road per million inhabitants in 2014, Romania is still in second-last place EU-wide. As much as 39% of all fatal road accidents which occurred in Romania in 2014 involved pedestrians, while a total of 12% involved cyclists and motorists in the same year

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37 European Commission - DG MOVE (Mobility and Transport) - Romania Country Scoreboard - Internal Market
38 Eurostat - File: Railway transport - Total annual passenger/goods transport.
39 European Commission - DG MOVE (Mobility and Transport) - Romania Country Scoreboard - People.
40 Eurostat - File: Annual number of victims by type of accident.
43 International Association of Public Transport (UITP) - Focus on Romanian General Transport Master Plan, 21 Sep 2015.
45 Own calculations based on European Commission - EU Transport in Figures - Statistical Pocketbook 2015, p.77.
46 European Commission - EU Transport in Figures - Statistical Pocketbook 2015, p.76.
In 2013, around 37% of the haulage by vehicles registered in Romania was national haulage, whereas 63% was international haulage (an increase of 27% compared to the previous year), moving a total of 34 billion tkm. In 2014, hauliers from Romania continued to dominate the transport operations in the external trade of their country. Based on the data from 2014, Romanian hauliers both in exports to and imports from other EU-28 are ranked third in the EU (see Figure 3). In 2014, Romania recorded a very strong growth of cabotage (domestic transport performed by foreign hauliers) which increased by some 39% as compared to 2013.

Figure 3: Share of home-based vehicles in tonne-km generated in exports to and imports from other EU-28 countries (% 2014)

The use of alternative fuels for new passenger cars in Romania is below the EU average, but has increased from 0.70% to 1.15% in 2014. The share of renewable energy in the country's transport fuel consumption, which reached 4.6% in 2013, is close to the EU average (5.4%).

Aside from the €6.84 billion available for the four transport sectors (rail, road, water and multimodal) for Romania in the period between 2014 and 2020, the GTMP envisages a further €7 billion ceiling for financing of road transport projects (which will come from public loans and the excise duty on fuel) to ensure the funding needed to implement projects in the road sector, giving priority to motorways.

c) Maritime Transport

Romania’s coastline is 256 km long, representing 0.19% of the total coastline of EU-22 coastal Member States. The coastline is entirely on the Black Sea, stretching from the Musura Gulf (at the Ukrainian border) to Vama Veche (at the Bulgarian border). Maritime ports in Romania handled over 43.6 million tonnes of goods in 2013, which was over 10% more than in the previous year. All of these goods were transported internationally and 80% of them were coming from, or destined for, countries outside the EU. Passenger ferry services in Romania started only at the turn of 2010/2011 and have no socio-economic significance yet. Major ports include three maritime ports: Constanta (TEN-T), Mangalia and Midia, as well as four river/maritime ports: Galati, Braila, Tulcea and Sulina (all of them part of the TEN-T). Traffic through Constanta, the largest of Romanian ports, has increased since 2009. In 2013, Constanta, with its 35.6 million of goods turnover, was ranked 20th among the top 40 largest EU seaports. The full potential of Constanta port is not being exploited due to some parts of the port needing renovation and a lack of intermodal infrastructure to allow smooth transhipment of containerised goods. Slow journey times by road, rail and water to destinations in Romania and beyond are causing Constanta to lose market share to Adriatic ports.

In 2013, containerisation of freight in Romania's major ports (measured by % of volume of goods handled) was at the level of 12%, which is lower than the EU-28 average of 20%. An inadequate and obsolete or insufficient infrastructure in ports may

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54 European Commission - European Semester Thematic Fiche - Transport, p.4.
56 European Commission - European Semester Thematic Fiche - Transport, p.4.
57 European Commission - DG MOVE (Mobility and Transport) - Romania Country Scoreboard - Energy Union and Innovation.
58 Romania’s Prime Minister’s Office - Cabinet Meetings - General Transport Master Plan approved by the Government, Feb 2015.
59 European Commission - DG MARE (Maritime Policy) - Studies to support the development of sea basin cooperation in the Mediterranean, Adriatic and Ionian, and Black Sea - Romania, Jan 2014, p.2.
60 Eurostat - File: Gross weight of seaborne goods handled in all ports, 1997-2013.
61 Eurostat - File: Number of seaborne passengers embarked and disembarked in all ports, 1997-2013.
62 European Commission - DG MARE (Maritime Policy) - Studies to support the development of sea basin cooperation in the Mediterranean, Adriatic and Ionian, and Black Sea - Romania, Jan 2014, p.7.
64 European Commission - EU Transport in Figures - Statistical Pocketbook 2015, p. 65.
65 Eurostat - File: Gross weight of seaborne goods handled in main ports in 2013 by type of cargo.
be a major, but probably not the only, cause of such a situation. Another challenge is the high costs of procedural requirements for exporting standardised cargo goods, as measured by the World Bank Doing Business Index\(^66\). In Romania, these costs are second-highest among the EU-28 countries, mainly due to high costs of inland transportation and handling, as well as high costs of the preparation of documents (see Figure 4). Additionally, exporting and importing goods by sea took two days longer in Romania than the EU average\(^67\).

**Figure 4: Cost of procedural requirements for exporting a standardized 20-foot container of goods (USD, 2014)**

The GTMP foresees the total investments in major Romanian ports to reach nearly €3.4 billion, of which the majority (some €865 million) will be for the port of Constanta (development of large container operations) and about €111 million are planned to be invested in the port of Galati (construction of a new multimodal platform).

**d) Inland Waterway Transport**

In addition to the four river/maritime ports indicated in the previous section, Romania’s inland waterway system comprises 26 river ports, the Danube River (1,075 km), and the connecting canals between the Danube River and the Black Sea. In 2012, the total length of navigable rivers, canals and lakes that were regularly used for transport accounted for 1,779 km\(^69\).

The Danube represents an important opportunity to connect the country to the European markets and to reduce the pressure of road transport that is more polluting. However, while water transport could have a considerable cost advantage over road and rail, it suffers from poor reliability, partly due to insufficient continuous depth of water in the Danube fairway. Moreover, sections of the canals between the Danube River and the Black Sea are in poor condition and require improvement to continue to operate efficiently. Seven sections of the Danube regularly fall below the depth standard of 2.5 m, required by an “international waterway” as defined by the United Nations Economic Commission\(^70\).

Improved maintenance and upgrading of inland waterways, and particularly of sections of the Danube in Bulgaria, Romania and Hungary, could remove significant bottlenecks in the EU transport network\(^71\).

In 2013, inland waterway freight transport had over 20% market share (in tonnage terms) of the transport of goods by land in Romania (see Figure 1). However, volumes of goods carried by this mode of transport have been gradually diminishing since 2005 and were some 15% lower in 2014 compared to 2005\(^72\). The major water based operational objectives in the GTMP concern among others:

- the improvement of availability and connectivity of the Danube as well as the reduction of accidents that occur on the river,
- the efficient use of port land and facilities,
- the reduction of emissions for CO\(_2\) and SO\(_2\),
- the increased use of intermodal transport\(^73\).

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66 The World Bank Doing Business Index measures the costs necessary to complete four predefined stages (document preparation; customs clearance and inspection; inland transport and handling; and port and terminal handling) for exporting a standardised 20-foot container of goods.

67 European Commission - DG MOVE (Mobility and Transport) - Romania Country Scoreboard - Investments and Infrastructure.

68 European Commission - European Semester Thematic Fiche - Transport, p.10.

69 European Commission - EU Transport in Figures - Statistical Pocketbook 2015, p.82.


72 Eurostat - File: Goods transported by inland waterway.

e) Air Transport

There are altogether 15 airports in Romania, out of which 12 constitute part of the TEN-T network. The airport in Bucharest (Henri Coandă) is the only airport in Romania that carries more than 5 million passengers a year. International flights constitute the majority of air passenger travel in Romania, while domestic flights accounted for only 7% in 2013, transporting just over 0.5 million of passengers. Although it is a relatively low volume of air passenger movement, it increased slightly in recent years (see Figure 5). In 2013, the air passenger traffic between Member States shows that Romania’s most popular flying destinations were Italy (2.2 million), Germany (1.5 million) and Greece (1 million).

Most domestic air services have Bucharest or Timisoara as origin or destination, so air connectivity within Romania to these two major cities is good, but other regional centres cannot easily be reached by air. The north and north-west parts of the country are isolated from the point of view of air services.

Figure 5: Air passengers using Romanian Airports (excluding transit)

For the aviation sector, the GTMP envisages investments to be carried out in 15 airports at the estimated cost of €1.33 billion, which includes nearly €669 million for the development of Bucharest Otopeni Airport, around €131 million for Cluj Napoca Airport, €111.6 million for Timisoara Airport and €281.5 million for the development of 10 multimodal centers.

f) Urban Transport

Urban transport in Romanian cities is mostly aged and largely reliant on bus and minibus services. In Bucharest, it includes also a metro system, a tram network, trolley buses, and an extensive bus network. Rail lines also exist which could potentially provide suburban transport services for commuting. In other Romanian cities and towns, public transport consists of buses, minibuses, trolley buses and trams. Cluj-Napoca has upgraded its tram system, while other cities have similar plans but lack funding to implement them. Traffic congestion is reported to be an increasing problem in a number of cities, as vehicle ownership grows (Bucharest, Brasov, Cluj-Napoca and Ploiesti). There is a plentiful supply of taxis in most Romanian cities, however, many of the vehicles are old and not fuel-efficient. Pedestrian and cycling infrastructure varies greatly in quality and quantity between different towns and cities, and within different city areas. A number of Romanian towns and cities have recognised the value of these modes in improving energy efficiency, reducing congestion and creating pleasant urban environments.

The GTMP does not cover urban transport investment and policy interventions. This is because responsibility for urban transport investment generally sits with the municipalities in Romania (with the exception of the Bucharest metro network), under the patronage of the Ministry for Regional Development and Public Administration of Romania (MRDPA). The need for Sustainable Urban Mobility Plans (SUMP) to guide urban transport strategies and investment has been identified by both the Government of Romania and by the European Commission. The terms of reference (TOR) have been drafted for studies to elaborate SUMP for eight urban centres of Romania – the capital city area of Bucharest and Ițfăv county, and seven larger cities that have been identified as regional urban growth poles (Constanta, Craiova, Ploiesti, Iasi, Brasov, Cluj-Napoca and Timisoara).

The rehabilitation and renewal of urban transport systems, potentially covering trams, trolley buses (an electric bus that does not run on tracks and is powered by electricity from an overhead wire) and the introduction of “intelligent transport”,

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75 European Commission - EU Transport in Figures - Statistical Pocketbook 2015, p.81.
76 European Commission - EU Transport in Figures - Statistical Pocketbook 2015, pp.54-55.
79 Romania’s Prime Minister’s Office - Cabinet Meetings - General Transport Master Plan approved by the Government, Feb 2015.
is expected to be a feature of integrated sustainable urban development projects in several cities. In the SUMPs, in parallel, measures should be taken to discourage car use. Such developments will make a significant contribution to socio-economic objectives, such as reducing climate change, increasing air quality and energy-efficiency, whilst also increasing competitiveness.

Cluj-Napoca metropolitan area, for example, faces numerous challenges that need to be met in order to create a sustainable urban transport system. The most important ones include:

- the lack of an efficient public transportation system that reduces mobility within the metropolitan territory and prevents economic development,
- the decay of the tram and railway transportation as a result of decreased service quality and lack of investments;
- the extremely degraded road infrastructure in rural areas surrounding the city,
- the insufficient use of bicycles as an alternative mode of transport,
- the under-sizing of the Cluj-Napoca Airport facilities and the lack of its connection with other modes of public transport (except for the bus, taxis are the only way to reach the town),
- the low average speed in the city of Cluj-Napoca – 13 km/h.

3. TOURISM

Between November 2014 and October 2015, around 9.7 million tourists visited Romania. The majority were domestic tourists residing in Romania (around 77%) and some 23% of visitors were from abroad. The vast majority of foreign tourists came from the EU Member States, out of which the largest proportion originated from Hungary, Bulgaria, Germany, Poland and Italy. The monthly distribution of tourists visiting Romania over this same period shows that August and July were the most popular months for both national and foreign visitors.

In 2014, the direct contribution of travel and tourism to the Romanian GDP was 1.6% (it was expected to rise by 2.6% in 2015). This reflects the economic activity generated by industries such as hotels, travel agents, airlines and other passenger transportation services (excluding commuter services). But it also includes, for example, the activities of the restaurant and leisure industries directly involved in tourist services. The direct contribution of tourism to GDP is expected to grow by 3.8% per annum by 2025. In 2014, tourism directly supported 205 000 jobs (2.4% of total employment), which is expected to rise by 0.6% in 2015. By 2025, tourism is expected to account for 207 000 jobs directly. The investments in the tourism sector in Romania amounted to 7.3% of total investment. A further rise of 8.4% is expected in 2015, and of 4.6% per annum over the next ten years, to reach the level of 7.6% of total investments in 2025.

Promising sub-sectors with higher added-value are health tourism and ecotourism. Romania has around a third of the natural mineral springs in Europe, offering diverse treatments. Investments to optimise local development may be supported in situations where local/regional development strategies have objectively demonstrated the existence of untapped market potential. Romania’s UNESCO World Heritage sites include one natural (the Danube Delta) and six cultural: the Churches of Moldova, the Dacian Fortress of the Orastie Mountains, the Historic Centre of Sighisoara, the Monastery of Horezu, the Villages with Fortified Churches in Transylvania, as well as the Wooden Churches of Maramures. In the Ministry of Economy of Romania, the Department for Small and Medium Enterprises, Business Environment and Tourism and the National Tourism Authority (NTA) are responsible for Romanian tourism affairs. The National Tourism Development Master Plan for Romania 2007-2026 is the main policy document for tourism. It sets the objectives for the development of all kind of potential touristic activities in different parts of Romania. One of the most important areas for touristic development is the coastal area (south-east NUTS2 level), which offers the possibility of a diversified portfolio of tourist activities owing to the unique biodiversity and landscape of the Danube Delta and the traditional seaside tourism in the southern part of the Romanian Black Sea shore. Under the Regional Operational Programme 2014-2020 the development of cultural heritage and tourism as drivers for local economic development is considered to be one of the funding priorities. It is foreseen that 45 additional cultural sites will be renovated under this priority.

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88 UNESCO (United Nations Educational, Scientific and Cultural Organization - The States parties - Romania.
92 European Commission - DG REGIO (Regional Policy) - Romania - Regional Operational Programme 2014-2020 - Info page.
In order to encourage sustainable tourism product development, two labels are awarded to industry players in Romania – the European Ecologic Label awarded by the Ministry for Environment and Climate Change of Romania, and the Ecotourism Certification System developed by the Association of Ecotourism in Romania. To ensure that the Romanian Black Sea Coast beaches achieve and maintain international standards, the “Blue Flag” Programme was launched in 2002 and has been operational ever since 93.

Map 2: Regions of Romania

Transylvania (from Latin – “the land beyond the forest”) is the second largest region of Romania which occupies the central part of the country (see Map 2). It is home to approximately 5 million people and main cities include: Alba Iulia, Bistrita, Brasov, Cluj-Napoca, Medias, Miercurea Ciuc, Sebes, Sibiu, Sighisoara, Targu Mures. The region is famous for its unique architectural treasures, such as castles, fortified churches and centuries old houses, established more than 900 years ago by Saxon craftsmen and merchants 94. The western Transylvania city of Cluj-Napoca traces its origin back to the Dacian settlement of Napoca in 2nd century A.D.

Clus means “closed” in Latin and refers to the hills that surround the city. With one of the most vibrant economies in the country and a population of around 330,000, Cluj is today a lively cultural and educational city. The six state universities and several private universities located in Cluj Napoca also make it the city with the largest percentage of student population in Romania (almost 19%) 95.

Source: National Transport Authority 96

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94 National Transport Authority - Romania Travel - Regions.
95 National Transport Authority - Romania Travel - Main Cities.
96 National Transport Authority - Romania Travel - Regions.