

## RESTORATION AND SUSTAINABLE VALORIZATION OF CULTURAL HERITAGE AND REGIONAL POLICY IN NORTH-WEST REGION OF ROMANIA. CASE STUDY OF REVITALIZATION OF THE ORADEA FORTRESS

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**Abstract:** *The paper presents cultural heritage, cultural tourism potential of North-West Region of Romania face to face with restoration and sustainable valorization of cultural heritage as a major domain of intervention of regional policy in Romania. Due to Romanian regionalization form, the Regional Operational Programme (ROP) is currently the only programme of regional policy in Romania in 2007-2013. One of the major domains of intervention of ROP 2007-2013 in Romania was restoration and sustainable valorization of cultural heritage. The first paper specific objective is to explore projects contracted until 31.12.2013 in the field of restoration and sustainable valorization of cultural heritage in North-West Region of Romania and their regional development relevance in the context of existing regional development strategies. The second paper specific objective is to present a model of restoration of cultural heritage in a sustainable way throughout the case study of Revitalization of the Oradea Fortress in order to introduce it in the tourism circuit - that could become an example for other cultural sites around the region and a succes story in the field of cultural tourism based of ROP 2007-2013 experience. Exploring rich cultural heritage of the North-West Region face to face with poor condition of cultural heritage sites and investments required in order to introduce them in touristic circuit, the paper concludes that all contracted projects are relevant for sustainable valorization of regional cultural heritage and cultural tourism potential in the context of existing regional development strategies, but they contributed only partially to regional specific needs. Also, the paper concludes that number of ROP 2007-2013 projects implemented in the field of cultural heritage is surprisingly small, area of interest of these projects is rather narrow and analyzes the most important causes for these gaps. Based on the case study presented, the paper suggests that a combination between devoting substantial own resources, perseverance and innovativeness in implementing and promoting projects could be an important condition for success for highly expensive, long lasting and highly innovative cultural heritage projects.*

**Keywords:** *cultural heritage, cultural tourism, regional policy, Regional Operational Programme 2007-2013, North-West Region of Romania, Revitalization of the Oradea Fortress Case Study*

**JEL classification:** O22, L83

### 1. Introduction

Over the past 20 years, cultural tourism becoming one of the most dynamic elements of the international tourism and a major area of growth (Zeppel and Hall, 1991). Despite global economic challenges, international tourist arrivals grew by an average of 4-5% a year (WTO, 2014). According to the latest UNWTO World Tourism Barometer, international tourist arrivals grew by 5% in 2013, Europe led growth in absolute terms (WTO, 2014) and remain "the world's No 1 tourist destination" (EC, 2010), Central and Eastern Europe being one of the leading sub-regions with 7% growth well above

European average (+5%) (WTO, 2014). In this context, cultural tourism is seen more and more as a quality tourism and a desirable market, because it is generally high-spending tourism - tourists that practice cultural tourism spend more per day and stay longer than tourists who practice traditional forms of tourism, and is usually undertaken by highly educated individuals who stimulate cultural activity in the destination (EC, 2014; Richards, 2007; Richards, 2001). Consequently, cultural tourism has become a major issue in regional development policy, a main challenge being how to market the attractiveness of a certain region in order to generate growth of tourist arrivals and spending (Giaoutzi and Nijkamp, 2006). This challenge is stronger in Central and Eastern Europe, including in Romania, due to difficulties to transform cultural heritage in competitive tourism products, packages or destinations at global level, considering major investments needed, limited resources, poor condition and low accessibility of cultural heritage objectives (Hall, Smith and Marciszewska, 2006; Coles and Hall, 2005). The sustainable development of cultural tourism is highly dependent in Central and Eastern Europe of EU funds and public administration capacity to develop effective management strategies for conservation, sustainable valorization and responsible introducing in touristic circuit of cultural resources (Spenceley, 2008; Mowforth and Munt, 2008; Robinson and Picard, 2006). Also, an important challenge for Central and Eastern Europe is to identify and develop cultural tourism niches (creative tourism, educational tourism, cultural volunteer tourism, gastronomic tourism, religious tourism, wellness and spa tourism etc.) in place of a "mass market" for cultural tourism (CE and EC, 2013).

The present paper has been developed in the framework of a larger research about the evaluation of the EU Regional Policy through Regional Operational Programme (ROP) 2007-2013 for the North-West Region of Romania (Dodescu and Chirila, 2013a; Dodescu and Chirila, 2013b; Stănculescu, Dodescu and Chirila, 2012). One of the major domains of intervention of Regional Operational Programme 2007-2013 in Romania was restoration and sustainable valorization of cultural heritage. The present paper specific goal is to explore projects contracted and completed until 31.12.2013 in the field of restoration and sustainable valorization of cultural heritage in North-West Region of Romania, to evaluate these projects relevance for sustainable valorization of regional cultural heritage and cultural tourism potential in the context of existing regional development strategies. The paper presents a model of restoration of cultural heritage in a sustainable way throughout the case study of Oradea Fortress (North-West Region, Romania) that could become an example for other cultural sites around the region and a succes story in the field of cultural tourism based of Regional Operational Programme 2007-2013 experience.

## **2. Cultural heritage and cultural tourism potential of North-West Region of Romania**

Even is large recognized as notorious problematic to define cultural heritage, that can has both global and local importance (Smith, 2009), based on UNESCO, Romanian Ministry of Culture and North-West Regional Development Agency data, without the intent of an exhaustive list, some milestones of North-West Region cultural heritage are:

- 8 Wooden Churches of Maramures included in UNESCO World Heritage: Barsana, Budești, Desesti, Ieud Deal, Poienile Izei, Surdesti, Plopiș, Rogoz (UNESCO, 2014);
- 4.017 heritage buildings, out of which 995 are designated as national interest objectives (RNWRDA, 2013), out of which: 4 urban historic centers: Cluj, Oradea, Dej, Gherla (RMC, 2010), 10 urban ensembles of particular architectural value: "Bistritz" medieval fortress, "Kornmarkt" Bistrita, Turda, "Canonical string"- Oradea, "Oradea II" , "Samuil Vulcan Market" - Beius, " Mihai Viteazul Market" - Cluj-Napoca, "Storehouse of

Salt"- Sighetu Marmatiei, "Freedom Market" - Sighetu Marmatiei, "Freedom Market"- Satu Mare (RMC, 2010), 19 important urban streets of particular architectural value declared as urban ensembles in Sighetu Marmatiei, Zalau, Satu Mare, Carei (RMC, 2010), numerous monuments and architectural ensembles, archaeological sites, Roman forts (Porolissum; Militar Castrum and Vicus; Fort of Bologa, Fort of Romita), medieval fortresses (Oradea, Ardud, Satu-Mare, Bogdand, Liteni, Bologa etc.) (RNWRDA, 2014; RMC, 2010), fortified settlements (Șimleu Silvaniei, Dăbaca, Bonțida etc.) (RNWRDA, 2013; RMC, 2010), castles (Wesselenyi - Jibou, Karolyi - Carei, Csaky-Almașu etc.) (RNWRDA, 2013), historic cities trade fairs (Gherla, Crasna) (RNWRDA, 2013) etc.;

- religious objectives with historical or architectural significance: 4 cathedrals (Greek Catholic Cathedral "St. Nicolae" Oradea, Orthodox Archdiocese Cathedral Cluj-Napoca, Armenian Catholic Cathedral Gherla, Roman Catholic Cathedral Satu Mare), Merry Cemetery Săpânța, churches, monasteries etc. (RMC, 2010);

- museums and public collections, art galleries, artistic events etc. (RNWRDA, 2013; RMC, 2010);

- popular cultural heritage of great originality: specific architecture of the villages from Northern Transylvania, wood, popular costumes and everyday utility objects decoration art, unchanged traditions and customs, traditional rural life, traditional ethno-cultural and religious manifestations (RNWRDA, 2013).

Wooden Churches of Maramures included in UNESCO World Heritage, picturesque towns with historic centers and urban ensembles of particular architectural value, wealth of historical monuments, Roman forts, medieval fortresses, castles with stylistic authenticity, multi-confessional religious objectives, churches with historical or architectural significance, popular cultural heritage of great originality etc. represent a high potential for developing cultural tourism in the context of an integrated regional tourism. Even if the importance of developing an integrated regional tourism is acknowledged (Regional Development Plan 2007-2013, Regional Development Plan 2014-2010, many projects financed from structural funds, cross-border cooperation for Bihor and Satu-Mare counties and spill-over effects of cultural tourism development in the neighboring county of Hungary etc.), the number and diversity of information tools to promote the cultural tourism are obviously insufficient and there are not yet diversified integrated tourist packages. Although there were increases in gross investments in tourism, they have focused mostly on accommodation infrastructure and, eventually, gastronomy and food components, but far less the tourist services and activities that tourists can carry on the cultural heritage potential offered by the different areas the region. The capitalizing of cultural heritage potential requires major investments for conservation and restoration of cultural heritage objectives (majority of them has been severely affected in time), solving the problems related to reduced availability of sightseeing, especially due to poor road infrastructure, the infrastructure and functionality problems in order to introduce these objectives in tourist circuit (lack of parking spaces, lack of facilities for visiting cultural tourist attraction: access roads, landscaped stairs, lookout points etc., lack of tourism promotion centres, point of information and specific tools for promoting cultural tourist attraction etc.) and coherent regional cultural preservation planning.

### **3. Regional policy in North-West Region of Romania and restoration and sustainable valorization of cultural heritage**

In the context of low regional attractiveness for foreign tourists (the North-West region ranks fourth nationally, foreigners preferred almost exclusively Cluj, Bihor and Maramures counties), low use of tourist accommodation capacity (under 40% in all counties in the region) and decreasing trends of tourist arrivals, overnight stays (drastic drops of tourist arrivals in motels, tourist chalets, villas, camps, school camps) under the

impact of the economic-financial crisis (RNIS, 2012), the development of cultural tourism became of particular importance. Compared to more advanced forms of regionalization from other EU Member States such as Germany, Belgium, Austria, Italy, Spain, France, Romania's existing "regionalization formula" is limited both in terms of resources and competences – existing regions of development were created more as units of observation for collecting data according to regional standards of EU policies and operational response to the requirements of EU regional policy in accordance with criteria that allow absorption of structural funds than for larger functions or purposes at regional level such as: urban development, infrastructure development, environmental protection, improvement of social services, supporting the business environment or cultural heritage. The Regional Operational Programme 2007-2013 (ROP) was in the current "formula" of regionalization, the only programme of regional policy in Romania in 2007-2013 (RMRDPA, 2014). One of the major domains of the Regional Operational Programme of Intervention 2007-2013 in Romania is *restoration and sustainable valorization of cultural heritage*. The objectives of this major domain of intervention were: increasing the importance of tourism and culture as factors that stimulates economic growth and sustainable development; extending the tourist season; increasing the number of tourists through valuing local and regional cultural tourism potential on national and international tourist market (RMDPWH, 2008). Consequently, this major domain of intervention finances projects aimed at the preservation, restoration, strengthening, rehabilitation, protection of tourism potential of UNESCO heritage and national cultural and local urban heritage according with UNESCO World Heritage List in Romania and Romanian Ministry of Culture List of historical monuments. In North-West region, at 31.01.2014, according to the North-West Regional Development Agency data (RNVRDA, 2014b), the ROP 2007-2013 absorption rate for the major domain of intervention 5.1 - *Restoration and sustainable valorization of cultural heritage and the creation or modernization of related infrastructure* is 32,56%, for the total financial allocation of 31,45 mil. Euro, the situation of applied, contracted and completed projects being as follows: 21 applied projects – financial allocation requested: 55,63 mil. euro; 11 contracted projects – financial allocation requested: 31,10 mil. euro; 4 completed projects – amount reimbursed: 10, 24 mil. euro. According with North-West Regional Development Agency data (RNVRDA, 2014c), the projects contracted through ROP 2007-2013, on the 5.1. MID *Restoration and sustainable valorization of cultural heritage and the creation or modernization of related infrastructure* in the chronological order of the contracts' signing are as follows<sup>4</sup>:

- 11.04.2009: *Circuit of medieval fairs in Northern Transylvania - Karolyi Castle from Carei, Karolyi from Ardud*, Beneficiaries: Carei Municipality Territorial Administrative Unit, Ardud Town Territorial Administrative Unit, Total value of the project: 23.179.393,00 lei, out of which grant assistance: 18.371.945,00 lei;
- 11.06.2009: *Revitalization of the Oradea Fortress in order to introduce it in the tourism circuit*, Beneficiary: Oradea Municipality Territorial Administrative Unit, Total value of the project: 36.780.329,12 lei, out of which grant assistance: 28.717.702,60 lei;
- 16.12.2009: *Restoration of historical and cultural heritage of Salaj County Council - Buildings of the County Military Centre, County History Museum and Art Gallery*, Beneficiary: Sălaj County Territorial Administrative Unit, Total value of the project: 25.424.792,84 lei, out of which grant assistance: 17.740.229,06 lei;

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<sup>4</sup> According with *National Bank of Romania*, annual average exchange rate in 2009- 2013 was between 4,2 - 4,4 lei/Euro.

- 21.06.2010: *Restoration and sustainable valorification of Calvaria Roman Catholic Church*, Beneficiary: Romanian language Roman Catholic Parish, Satu-Mare, Total value of the project: 6.550.619,62 lei, out of which grant assistance: 5.408.206,44 lei;
- 30.06.2010: *Restoration and rehabilitation of the wooden church of St. Archangels Michael and Gabriel-Rebrisoara, in order to introduce it in the tourism circuit*, Beneficiary: Orthodox Parish Gersa, Gersa, Bistrița-Năsăud, Total value of the project: 1,729,129.25 lei, out of which grant assistance: 1,424,891.58 lei;
- 30.06.2010: *Circuit of wooden churches in Northern Transylvania*, Beneficiary: Maramureș County Council, Total value of the project: 19.099.090,52 lei, out of which grant assistance: 15.160.569,62 lei;
- 12.04.2012: *Restoration of the wooden church Buzesti from Farcasa village, Maramures, in order to introduce it in the tourism circuit*, Beneficiary: Farcasa Hall, Farcasa, Maramureș, Total value of the project: 3.940.916,86 lei, out of which grant assistance: 2.384.907,00 lei;
- 26.10.2012: *Circuit of Roman forts from Salaj county*, Beneficiary: Partnership of Salaj Territorial Administrative Unit, Buciumi Territorial Administrative Unit, Mirsid Territorial Administrative Unit, Total value of the project: 35.859.112,00 lei, out of which grant assistance: 25.431.180,00 lei;
- 29.01.2013: *Structural and architectural rehabilitation of the Reformed Church CJ-II-mA-07759 and related wall inside from Sic, Cluj county*; Beneficiary: Reformed Parish Sic, Sic, Cluj, Total value of the project: 10.029.034,00 lei, out of which grant assistance: 7.671.817,00 lei;
- 25.04.2013: *Creating the German center of Bistrita by rehabilitating historic building "Silversmith House"*, Beneficiary: Bistrița-Năsăud Territorial Administrative Unit, Total value of the project: 2.458.680,00 lei, out of which grant assistance: 1.765.986,00 lei;
- 18.09.2013: *Rehabilitation of Reformed Church CJ-II-MA-07380,16 Kogalniceanu Street. 16 of Cluj-Napoca, Cluj County*, Beneficiary: Central Reformed Parish nr. 1, Cluj-Napoca, Total value of the project: 18.912.243, 00 lei, out of which grant assistance: 14.951.382, 00 lei.

#### **4. Case Study of Revitalization of the Oradea Fortress**

**Description of project:** Former medieval fortification Oradea turned 900 years from the first documentary attestation and is considered one of the most representative Italian Renaissance Fortresses in Central and South-Eastern Europe. The "*Revitalization of the Oradea Fortress in order to introduce it in the tourism circuit*" is an on-going project conducted in North-West Region of Romania, between June 2009 - December 2015, by the Oradea Municipality Territorial Administrative Unit, total value of the project: 36.780.329,12 lei (around 879.9121,77 EURO at June 2009), out of which grant assistance: 28.717.702,60 lei, contribution of the beneficiary: 7.477.075,65 lei. The project aims to reintroduce the *Fortress of Oradea* in tourism circuit at regional, national and international level as a representative centre for regional cultural heritage, creating additional revenue at regional and local level and new jobs in the field of culture, tourism and related economic sectors. **Potential target groups will be:** tourists, local government, local institutions, cultural institutions and NGOs and their employees currently located in Oradea Fortress who will benefit from improving working conditions, Oradea residents, cultural NGOs and their members etc. (RNVRDA, 2014c, Oradea Municipality internal data, Revitalization of the Oradea Fortress project website).

**Context:** The analysis of statistical data on tourism activity in Bihor (BCDS, 2012) indicates the following trends for 2007-2011: the number of tourist arrivals in the establishments of tourists' reception with functions of tourist accommodation in Bihor

County increased slightly (0.44%) in 2011 compared to 2007, but significantly from 2010 (17.63%) while the lowest was recorded; number of tourist arrivals in accommodation structures related to tourism or adventure tourism: tourist chalets, villas, camps, school camps, however, is almost insignificant (numbers in the thousands of tourists per year); the number of foreign tourists in Bihor county is low - 38 939 in 2011, but an increase of 30.65% comparing with 2010, the number of nights spent by tourists in the establishments of tourists' reception with functions of tourist accommodation in Bihor County increased by 13.42% in 2011 compared to 2010, respectively with 18.02% for foreign tourists, though the values from 2011 are lower than in 2007; net use index of tourist accommodation capacity in operation in Bihor county is low - 38.4% in 2011, with a slight increase compared to 2010, but a big drop from 2007, when register 47%.

**Problem addressed:** On the one hand, rehabilitation of the Oradea Fortress, that on starting date of the project, was abandoned by the military garrison and had reached an advanced stage of ruin; on the other hand, attracting new tourists for a longer stay, even in the winter months, especially foreign tourists, for the following forms of tourism: cultural, religious and heritage (organized groups that come with a specific purpose of visiting the city, especially due to the tomb of St. Ladislau), thermal tourism (Baile Felix, Baile 1 Mai are thermal spas nearby Oradea), events tourism (festivals), ecotourism (youth, especially foreign tourists for organized excursions), business, exhibitions and conferences tourism (business meetings, professional meetings, exhibitions, conferences, symposia, book launching etc.) (Oradea Municipality internal data, *Revitalization of the Oradea Fortress project website*).

**Approach:** This project uses an integrated approach that provides: strengthening, preservation, restoration and functionalizing of 8 buildings totalling approx. 13,514.7 square meters building, about 190 rooms and 13514.25 square meters exterior surfaces; the reintroduction of functions compatible with the monument by creating 19 touristic and cultural functions: City Museum, Lapidarium, Bread Museum, Fortress Library, exhibition spaces, traditional centres (medieval restaurant, centre for promoting crafts and traditional art) etc.; increasing the accessibility of the monument: the restoration, development of access roads, outdoor lighting and decorative landscaping; creating and hosting a cultural consortium, holding 2 annual festivals and other 20 small cultural events; extending tourist season by introducing Oradea Fortress in European tourist and cultural circuit; revitalization of traditional economic activities in the Fortress etc. (Oradea Municipality internal data, *Revitalization of the Oradea Fortress project website*).

**Impact:** 27.028 square meters proposed interventions (buildings, green spaces and access roads), 119 new jobs created, increase energy efficiency by 100%, facilitate the access of tourists at rehabilitated heritage objective with 100%, 10.125 visitors until 2015, extension with 200% of the tourist season (more visitors in the winter months), increase the number of tourists in 2015 with 300%, 10 annual festivals organized, 60 small cultural events conducted by in first 3 years after implementation (Oradea Municipality internal data, *Revitalization of the Oradea Fortress project website*).

**Considerations for success:** The most important issue for the project success is, in our opinion, good governance of Oradea Municipality reflected in the capacity to generate and co-finance a cultural heritage tourism project at this scale. The project was declared *best practice example* for ROP Axis 5: Sustainable development and tourism, DMI 5.1. Restoration and sustainable valorization of cultural heritage and the creation / modernization of related infrastructure, and Oradea Municipality - an institution example of good practice for developing unique combination of communication tools to promote the "Fortress of Oradea" (conferences and press releases, leaflets, brochures, guides,

multimedia virtual tour, project website etc.) (RNVRDA, 2014c, Oradea Municipality internal data, Revitalization of the Oradea Fortress project website). Also, the project responds in an innovative way to the challenges of cultural tourism nowadays, developing cultural tourism niches (creative tourism, wellness and spa tourism, gastronomic tourism, religious tourism, educational tourism, cultural volunteer tourism etc.)

### **Conclusions**

Exploring rich cultural heritage of the North-West Region and considering that most cultural heritage sites are in poor condition and require investments for rehabilitation, infrastructure, access and functionality in order to introduce them in touristic circuit, number of ROP projects applied and implemented in the field of cultural heritage is surprisingly small and area of interest of these projects is rather narrow: 5 churches restoration/rehabilitation projects (2 orthodox wooden churches, 2 reformed churches, 1 roman catholic church), 3 circuit tourism projects (circuit of medieval fairs in Northern Transylvania, circuit of wooden churches in Northern Transylvania, circuit of Roman forts from Salaj county), 2 rehabilitating historic buildings projects (Salaj County Military Centre, History Museum and Art Gallery; "Silversmith House" from Bistrita), 1 fortress rehabilitation project (Oradea Fortress).

Nevertheless, all above projects are relevant for ROP 2007-2013 as sectorial program in Romania of EU regional policy, for North-West Regional Development Plan 2007-2013, are in accordance with region potential for cultural tourism development, but contributed only partially to regional needs in the field of cultural heritage. In our opinion, the most important causes are: amounts allocated were insufficient for this area of intervention that demands major investments, projects ranging from a value of 1,7– 85 milion lei (around 0,37 – 18,88 mil. euro), minimum percentage of the applicant's own contribution being 2% (RMDPWH, 2008), the impossibility of involvement of the private sector as far as local and central public administration authorities, religious establishments, NGOs and partnerships between these were the eligible beneficiaries (RMDPWH, 2008), low inclination and practice in the field of partnerships in local public administration, lack of expertise in project writing and project management and lower ability of local public administration, especially in smaller towns and communes, to generate cultural heritage tourism projects.

However, it is also true that the ROP 2007-2013, the only operational program managed at regional level in Romania, determined important steps in the direction of know-how transfer, multi-level governance and partnership culture in regional cultural tourism. The experience of beneficiaries and regional development agency in the implementation and monitorization of restoration and sustainable valorisation of cultural heritage projects can substantiate in our opinion, both North-West Regional Development Plan 2014-2020, and regional decentralization of regional cultural tourism, at least for UNESCO cultural heritage and national heritage.

Finally, is there a role for local governance in regional cultural tourism relative to other actors (European, national, regional authorities)? The situation in the field of cultural heritage in North-West Region of Romania suggests the fact that the Romanian local government has limited resources to act outside the EU funds in the broader cultural tourism field. The case study of *Revitalization of the Oradea Fortress in order to introduce it in the tourism circuit* presented suggests that, in a climate of competition between local governments at regional level to attract tourists and investors, will earn only those who devote substantial own resources and prove their perseverance and innovativeness in implementing and promoting projects, knowing that cultural heritage projects are highly expensive, long lasting and highly innovative projects.

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