

SUMMARY

This paper is the result of research conducted over recent years (after 2004), after having defended my doctoral thesis, both individually and as manager or member of several research teams. The scientific activities were conducted by the research teams of the Department of Human Geography and Tourism of the Faculty of Geography, in collaboration with a number of colleagues from other departments of the Faculty of Geography. At the same time, in order to solve certain challenges, inherent in the research process, I collaborated with another renowned institutes, research units and laboratories, such as the research centers of the Faculty of Geography (Centre of Regional Geography and Centre for Research on Settlements and Urbanism), the scientific research group DITT (Development, Innovation and Transformation in Tourism), of which I am a founding member and a Coordinator) within the Faculty of Geography from Babeş-Bolyai University - all of which belong to the University Babeş-Bolyai from Cluj-Napoca -, the team of Geography within the Branch of Romanian Academy from Cluj-Napoca, as well as with other institutions which, along with specialists, have provided statistical database, charts and maps, documents and information necessary for elaboration of different studies and research and economic projects (National Institute of Statistics, County Statistical Institutes, County Councils, Town Halls, various NGOs, institutes and organizations involved in the organization, development and promotion of tourism). Also, a series of scientific research and papers were developed through the constant cooperation I have had with other members from university extensions of our faculty and from other universities in the country and abroad, or with specialists from the Agency for Northwest Regional Development, in the of County Councils of the Northwest Region of Romania.

The scientific activity – i.e. publications and conference presentations – mainly consisted in: articles published in ISI indexed journals, articles published in ISI indexed proceedings; articles/studies published in IDB indexed journals with a B+ CNCSIS rating; articles published in university journals with scientific reviewers and ISSN; book chapters published in CNCSIS-accredited publishing houses; specialized books published in CNCSIS-accredited publishing houses; extensive publications in major international and national conferences;

The research activities mainly consisted in: scientific research grants awarded in national competitions, funded by ANSTI, CNCSIS, UEFISCDU; working as coordinator/manager or research team member in various international projects, as well as in projects/national contracts accessed in national competitions.

The habilitation thesis entitled "**Theoretical and methodological framework for interdisciplinary approaches in Geography of Tourism - support for prospecting, strategic planning, and an efficient, functional and sustainable arrangement and capitalization of touristic heritage**" - is structured on the following parts: summary, contributions and achievements in scientific research, academic and professional activity (found in three separate documents: curriculum vitae, verification index of completion of minimum standards for the position of Professor, respectively the list of published academic works), perspectives of research, academic and professional activities (development plan of university career), as well as bibliographic references.

This study represents synthesis and also a diagnosis and a prognosis of the Romanian touristic phenomenon and is aimed at knowing the characteristics of touristic resources, of the touristic phenomenon as a whole, but also sequentially, of its multiplier effects, both quantitative and qualitative, but also the real dynamics of the touristic phenomenon, as a support for prospecting, strategic planning, and an efficient, functional and lasting arrangement and capitalization of touristic heritage.

The thesis submitted for analysis has several practical facets, the situations presented in this study - as means and methods of work, in order to identify, inventory, rank and assess the attractive resources' value, but also as strategies and directions of development, objectives and specific punctual measures used and possibly to be extrapolated through adaptation to concrete situations encountered in the territory - being able to form the basis of strategically political orientation for organization and sustainable development of Romanian tourism and of the institutions involved in these activities. Scientific structure is doubled by a multitude of elements with practical applicability, effective and of quality, embodied in the wide context of this subject and found again punctually within the thesis (see below).

It is noteworthy that my scientific work followed three main directions:

Research domain A: Theoretical and methodological foundation from geographical perspective of tourism – support for prospecting, strategic planning, and an efficient, functional and lasting arrangement and capitalization of touristic heritage;

Research domain B: The prospective analysis of attractive resources – support for the approaches on strategic planning, arrangement, optimization and the efficient, functional and sustainable capitalization of tourism heritage;

Research domain C: Interdisciplinary approach to the analysis of the traditional heritage attractive components for the development and diversification of the supply and its sustainable tourism capitalization.

Thus, the **first research domain (A)** entitled *”Theoretical and methodological foundation from geographical perspective of tourism – support for prospecting, strategic planning, and an efficient, functional and lasting arrangement and capitalization of touristic heritage”* is an ideal resource for educators, students, developers, entrepreneurs, investors, corporate strategists, planners, policy makers, and anyone interested in sustainable tourism for the new millennium.

With this research domain, my efforts focused on two main study and research fields, on topics for which I performed complex analyses:

Research field I: *Theoretical and methodological research in the field of Geography of tourism, Touristic prospection and Touristic arrangement – definition, content and significance, role, importance, evolution, concept, principles, typology, methodology, patterns, strategies of sustainable development.*

Within this field, I tackled three topics of great importance for research focused on the field of tourism. I carried out the scientific activity at the Department of Human Geography and Tourism of Babeş-Bolyai University from Cluj-Napoca, to which I am also affiliated through the Center of Regional Geography and the Center of Research of Settlements and Urbanism, respectively of the DITT scientific research group (Development, Innovation and Transformation in Tourism, whose founding member and Coordinator I am) within the Faculty of Geography of Babeş - Bolyai University in Cluj-Napoca.

Also, a series of scientific papers were developed through the constant cooperation I have had with other members from university extensions of our faculty and from other universities in the country and abroad, or with specialists from the Agency for Northwest Regional Development, in the of County Councils of the Northwest Region of Romania.

The scientific activities corresponding to the main research topics are listed below.

Thus, within these important issues, the following topics were approached through research and the publication of books, university courses, articles, and national and international conference presentations:

- clarification of the essence of the touristic phenomenon;
- clarification and simplification (by reaching to the essentiality) of concepts and definitions used in this domain;
- eliminating the lack of touristic information, respectively its systematization (at the level of natural attractive resources of the environment, but mostly anthropical);
- identifying and assessing the exact types and forms of tourism;
- identifying and prioritizing the touristic space taxonomy, specifying clearly the principles and criteria for the identification and delineation of functional units (touristic landmark, touristic complex, touristic area, touristic zone, touristic region), classification and spotlighting the characteristics of each;
- highlighting the ecological impact of tourism (over antroposystem and upon the natural environment, respectively at the level of each phenomenon or constituent part);
- the underlining of the study object, of the role and importance of touristic prospection, respectively of the manner in which it coagulates (builds) the touristic system, the specific of its elements, relations and interrelations established among the various components involved or implicabile in effective unfolding of the touristic act;
- establishing with accuracy of the stages, phases and main activities of a prospective endeavour upon all the categories of natural attractive resources (of relief, climate, hydrography, biogeography) and anthropic of a territory with complex and diversified resources (irrespective of the spatial extension and of the taxonomic rank), nuanced and adapted, of course, depending on the specifics of each type of attractive resources and on interference in various manners and weights of other elements with a direct or indirect influence over them;
- pointing out of the main prospection techniques and means of regional touristic prospection, highlighting the advantages and disadvantages of each;
- identification of the main benchmarks that define the touristic market and how it should be approached from the perspective of a prospective study;
- identification of the main benchmarks that define the touristic demand and the way (methods and techniques) in which it must be approached in terms of a prospective study;
- identification of the main characteristics that define touristic consumption and the way (methods and techniques) in which it must be approached in terms of a prospective study;
- identification and clear specification of the main features of the touristic product and the way (methods and techniques) in which it must be approached in terms of a prospective study;
- establishing with accuracy of the stages, phases and activities reported by organizing and conducting the process of forecasting in tourism;
- specifying the relevant theoretical and methodological parts of organizing geographic space, spatial planning and touristic arrangement;
- identifying and the role, importance, main concepts, principles, typology and methodology typical for the planning process and touristic arrangement;
- analysis of the evolution of the geographical space touristic arrangement;

- establishment of typology of touristic facilities and of characteristics specific for each identified type: the touristic arrangement of mountain area; touristic arrangement of seaside space; the arrangement of the spa resorts; the tourism arrangement of protected areas; the tourism arrangement of urban and suburban areas; touristic arrangement of rural traditional areas and of touristic villages.

As can be seen in the listing of the scientific topics which were addressed, the corresponding research activities, and the scientific publications in books, ISI or IDB indexed journals or conference proceedings have always been original, and have provided relevant scientific contributions to their respective fields.

Research field II: *Studies and research on the processes and phenomena of the touristic risk and of their impact upon the touristic phenomenon and research: the impact of tourism upon the environment and risks induced by touristic arrangements and activities.*

The scientific work corresponding to this research field aimed to tackle several relevant topics, of high national and international importance.

The research was conducted at Department of Human Geography and Tourism, Babeş-Bolyai University from Cluj-Napoca, to which I am also affiliated through the Center of Regional Geography and the Center of Research of Settlements and Urbanism, respectively of the group of scientific research DITT (Development, Innovation and Transformation in Tourism/Development, Innovation and Transformation in Tourism, whose founding member and Coordinator I am) within the Faculty of Geography of Babeş-Bolyai University in Cluj-Napoca.

At the same time, in order to solve certain challenges inherent in the research process, I collaborated with colleagues from our faculty and also from university extensions of our faculty and from other universities in the country on issues related to risk phenomena and their impact upon the environment and the risks induced by the touristic arrangements and activities.

The research carried out on this field's two topics addressed a number of important issues:

- the definition and specification of the characteristics of the processes and phenomena of touristic risk;
- the causes of the occurrence of touristic venture phenomena;
- typology of touristic risk processes and phenomena;
- analysis of the risks and impacts of products or induced by touristic activities and arrangements of profile upon the elements of natural landscape and especially upon the touristic resources with touristic valences;
- analysis of the risks and impacts of products or induced upon touristic activities and of arrangements of profile by phenomena and processes of the touristic venture;
- possibilities and practical modalities to prevent and combat/limit the negative impact induced by the touristic activities on the natural elements of the natural landscape, and especially on the resources with touristic valences;
- possibilities and practical modalities to prevent and combat/limit the negative impact induced by the phenomena and processes of touristic risk upon the touristic activities.

The research I conducted, materialized into articles and papers, presented at national and international conferences, which represent valid, original contributions to the field.

The widest part of the thesis (**represented by domain of research B**) is focused on *"The prospective analysis of attractive resources – support for the approaches on strategic planning, arrangement, optimization and the efficient, functional and sustainable capitalization of tourism heritage"*

In this **research domain**, I tackled one main field focused on *Studies and research on different components of the primary tourism supply (attractive resources), secondary tourism supply (tourism infrastructure) and operational components of the tourism market (tourism flows, tourism supply and demand) in view of the inventory and identification of the attractive features, the estimation of the attractive values and ranking of material and non-material tourism resources which make up the attractive offer of a territory, regardless of its spatial extension (from the level of a single objective, of settlements, resorts, suburban areas, metropolitan areas, to the level of tourism zones and regions, "land"-type regions, natural units or drainage basins or to administrative territorial or planning units - PUG, PUD; PUZ; PATZ, PATJ; PATN, GALs, microregions or development regions, up to the level of the national territory or even territories comprising several countries – crossborder regions, catchment areas including several countries) and the taxonomic rank (from the tourist point of interest to tourism settlement or resort, than area, complex, zone and up to the tourism regions with varied and complex attractive resources) on the basis of which we proposed methodologies and models of optimal, functional and sustainable tourism capitalization and development regarding the respective objectives, locations and spatial entities.*

Within this field, I tackled **four main topics** of great importance for research, focused on the various components of the primary touristic offer (attractive resources) and secondary (touristic infrastructure) or on the operational components of the touristic market.

The scientific work corresponding to this research field aimed to tackle several relevant topics, of great national and international importance.

The scientific activities corresponding to the main **topics** of research are listed below.

- *The inventory, the identification of attractive characteristics, the assessment and ranking of the attractive value of tourism offer and the drawing up of optimal, functional and sustainable planning and development strategies regarding objectives, locations and territories of different spatial extension, taxonomic rank and complexity.*
- *Design, development and implementation of methodologies to specific areas designed to optimize exploitation of the territory attractive offers targeted through specific forms of exploitation and development*
- *Identification, analysis, interpretation of the changes produced in the framework of the Romanian tourism in the period after December 1989 and of their impact on the satisfaction of the inner tourists*
- *Elaboration of planning strategies and optimal, functional and sustainable tourism development aiming objectives, locations and territories of spatial extension, taxonomic rank, complexity and different delimitation criteria*

Thus, within these important issues, the following topics were approached, through research and the publication of books, university courses, articles and lectures at national and international conferences.

The research was conducted at the Department of Human Geography and Tourism of the Faculty of Geography, in collaboration with a number of colleagues from other departments of the Faculty of Geography. At the same time, in order to solve certain challenges, inherent in the research process, I collaborated with another renowned institutes and laboratories, such as the research centers of the Faculty of Geography (Centre of Regional Geography and Centre for Research on Settlements and Urbanism), the scientific research group DITT (Development, Innovation and Transformation in Tourism), of which I am a founding member and a Coordinator) within the Faculty of Geography from Babeş-Bolyai University in Cluj-Napoca, the team of Geography within the Branch of Romanian Academy from Cluj-Napoca, as well as with other institutions which, along with specialists, have provided statistical database, charts and maps, documents and information necessary for elaboration of different studies and research and economic projects (National Institute of Statistics, County Statistical Institutes, County Councils, Town Halls, various NGOs, institutes and organizations involved in the organization, development and promotion of tourism).

Research carried out on this field's various topics addressed a number of important issues:

- The identification, inventory, exhaustive mapping of all the natural and anthropogenic attractive resources of a territory to be planned (the natural and anthropogenic tourism attractions, the tourism infrastructure: accommodation units and restaurants, leisure, entertainment, treatment and sporting facilities; information, business, communication lines and means of transportation, auxiliary facilities).
- The detailed analysis of the structure and consistence of the identified attractive resources, as well as the typology, structure, functionality, quantitative and qualitative characteristics of the tourist material basis components.
- The estimation (assessment) of the attractive value of the resources (of the tourism potential) in territories of various extensions based on the issue of comparative value judgments and using assessment methods *in quantitative terms regarding the tourism potential* of the analyzed area (imagining a number of indices which – individually or combined – allow the determination of spatial differences based on which one may “create” different typologies but the degree of relativity of the results is often high; for example, the method of the evaluation score is frequently used) and the ranking of the attractive value of the tourism offer for territories of different extensions and taxonomic rank.
- The ranking of tourist attractions applied at the level of each type of resource previously inventorized and assessed, and also all together (making up, by adding, the global attractiveness potential of that given territory). Generally, the ranking is made for objects of the same type, where the qualitative differences between them are easier to estimate based on a sum of criteria specific for the field of tourism (the attractive value, the territorial density and distribution, the degree of perishability, accessibility etc).

The ranking process allows the setting of planning priorities and the inclusion in the tourism circuit of different objectives from a given territory. This approach provides to the decision factors the necessary information to make the right decisions, not only regarding the planning priorities, but also to diversify the offer, by including more and more varied attractions to be capitalized (even if a certain type becomes dominant in a given territory due to its valuable elements which surpass the other types). Also, the ranking of the objectives in a region allows the easy identification of the type of tourism for which it has most facilities. This fact is very important because the knowledge of the type of tourism which is to be practiced anticipates the building of an infrastructure that is adapted to it, including leisure facilities, treatment facilities or other facilities meant for the development of cultural events, for example.

The knowledge of the structure of attractions and the type of objectives integrated in the tourism geosphere also facilitates the setting of forms of tourism proper to the given territory.

- The knowledge of the peculiarities of the attractions and also of the system of inter-relations between the levels of tourism supply and demand. The need for recreation, for physical and psychic recovery, to cultivate the self, depends permanently on the economic and social living standards of the population, for the tourism development prognoses in the given region to have a real support.
- The assessment of the present stage of capitalization of the tourist attractions in the spaces targeted by studies: the present dynamics of the tourism circulation in the area (the number of tourists, the total accommodation nights, the degree of use of the accommodation capacity, the average duration of stay, the structure and origin of domestic and external

tourist flows, the degree of tourism polarization of the analyzed territory, the degree of use of the accommodation units, the tourism circulation density, the tourism seasonality).

- The identification of post-Revolution changes that have a direct influence on tourism and the trends and evolution of tourism after 1989.

- The identification of the tourism types and forms that are practiced or to be practiced in the analyzed territories.

- The determination of the risk elements in tourism which may become manifest in the reference area.

- The determination of the role to be played by tourism in the future regional tourism system, the identification of present and potential risks, the analysis of their valorization (both from the point of view of planning costs and also of the potential tourism demand) and the drawing up of the proposals and decisions to promote tourism.

- The assessment of the place of tourism in the ranking of the economic fields within the region (the economic impact of the tourism activities and the weight of tourism in the regional economy), the strips of territorial superposition and critical interference points of tourism with other trends to capitalize the soil and underground resources (like the industrial, forestry and agricultural ones) and its possibilities to develop tourism along with these ones.

The overview on the attractive potential of a tourism region favors the *phasing of capitalization*, starting from the top objectives, meant to impose the just-born tourism system within the main demand options. Its amplification will be a signal for the triggering of the next planning stage, when the other attractions will be integrated in the capitalization process, in the descending order of their value.

However, the regional development strategy will not exhaust all the resources, knowing the fact that richness of the offer diminishes the exploitation efficiency by dissipating the demand between objectives of the same type.

- The setting up of the SWOT analysis (including the identification of strengths, weaknesses, opportunities and limits to tourism development) and the identification of the system shortcomings.

- The creation and processing of tourism databases for statistical purposes.

- The setting of the main action directions, the drawing up of the necessary objectives, measures and proposals for the tourism capitalization of the attractive resources in the analyzed territory and the structural and functional remodeling of the tourism space and its optimization.

- The drawing up of the concept of tourism planning for different types and sizes of tourism facilities – a stage which supposes the identification of the essential features of the different components: real estate (architectural style, interior and exterior design, construction materials, colors, proportions, dimensions etc), courtyard (components, manner of organization, design etc), leadership (the management system), functionality (mechanisms, “pieces”, interfaces, mass, energy and information transfer, internal and external connections, restrictive or disturbing factors, catalysts, control points etc), staff (knowledge, skills, outfit, equipment, looks, age, studies, communication abilities etc), advertising (brand image: identification and motivation component; PR system), services-products, furniture (design, material, arrangement etc), operations (booking system, cooperation modalities etc), clients (segment definition, segment location), technology, location – at continental, national, regional and local scale, site (how the site should look, detailed position), access (quantitative and qualitative characteristics), prices (high, low, flat-rate, preferential, differential, unique etc).

- The identification of the tourism planning components to be created (infrastructure, human resources, management, clients, raw materials and product providers, partners, creditors and functional mechanisms – the components and the relations between them or the relations with the outer world).

- The identification and determination of the role played and the impact of the factors which influence the location of tourism units (the type of unit, the capacity, the juridical status of the economic agent, the geographical location, access, the terrain configuration, the microclimatic and topoclimatic characteristics, the drainage network characteristics, the vegetation characteristics, the landscape aspect, the degree of tourism attraction of the region in question, the existence of tourist attractions, the drinkable water supply, the sewerage system, the power supply, the cable or satellite TV network, the fixed telephone network, the mobile phone and wireless internet coverage, the sources of raw materials, the ground stability, the degree of pollution, restrictive or disturbing elements, the financing sources, the price of the land, the planning costs, the duration of the building project, the redemption period, the aimed market segment, the potential areas issuing tourists).

- The identification of the risks for future tourism plans (both during the tourism planning process and during the tourism plan capitalization): natural risks, risks related to the cooperation with the authorities, risks related to the market, internal risks of the organization, conjuncture risks, legislative risks, geopolitical risks etc.

The research I conducted materialized into books, university courses, articles and papers, presented at national and international conferences, which represent valid, original contributions to the field.

For reasons related to the limits imposed by the requirements of this approach, we give up to the detailed overview of the achievements related to the studies [11-23] and will only make reference to [9] and [10]. In [9], we set and validated an original scoring methodology of the attractive value of tourism resources, including qualitative and quantitative aspects. In [10] we applied – in a logical succession – the integral methodology specific to the geographical and tourism matrix to drawn up the tourism plans for territories of various extensions and complex and diversified

resources. These methodologies may be extrapolated and applied, including the adaptations imposed by the specificities of any territory that might be approached in this manner.

The last research field addressed (C domain of research), was focused on the *interdisciplinary approach to the analysis of the traditional heritage of attractive components for the development and diversification of the supply and of its sustainable capitalization of tourism*.

In this domain of my scientific work, I tackled three main study and research fields (that are listed below), on topics for which I performed complex analyses of great importance for research focused on the domain of rural tourism and agritourism.

- **Research field I:** *Theoretical and methodological foundation of agritouristic and rural touristic phenomenon from Romania - evolution, prospection, simulation-optimization and forecasting, role, importance and impact in revitalizing the socio-economic development of the Romanian rural space.*

- **Research field II:** *Social territorial analysis of the rural tourism and agrotourism from Romania from the perspective of regional and local development*

- **Research field III:** *Geographical and social territorial analysis of rural tourism and agritourism at different scales of spatial and taxonomic extension (regions of "land" type, counties, localities incorporated in the formal touristic circuits or which reveals requirements to follow such a development)*

The scientific activities corresponding to the main research topics are listed below.

Thus, within these important issues, the following topics were approached through research and the publication of books, university courses, articles, and lectures at national and international conferences:

I carried out the scientific activity at the Department of Human Geography and Tourism, Babeş-Bolyai University from Cluj-Napoca, to which I am also affiliated through the Centre of Regional Geography and Centre for Research on Settlements and Urbanism, respectively of the of the scientific research group DITT (Development, Innovation and Transformation in Tourism, of which I am a founding member and a Coordinator) within the Faculty of Geography of Babeş-Bolyai University in Cluj-Napoca. Also, a series of scientific papers were developed through the constant cooperation I have had with colleagues from extensions of our faculty and from universities in the country and abroad, or with specialists from ADRNV/ NWRDA, County Councils from Romania's North-West Region, especially for the elaboration and interpretation of questionnaires and of other tools for the qualitative study of the various indicators pursued in our studies.

Within these fields I, I tackled **three topics** of great importance for research focused on the domain of rural tourism and agritourism:

- *Identifying of components and mechanisms of functioning of the rural tourism and establishing their role in effective and durable unfolding*

- *Basic Features and the Role of Rural Tourism in the Economic Diversification of Rural Space in Romania*

- *The role of rural tourism in the social and economic revitalization of romanians "lands"*

The scientific results have been and will continue to be used for didactic purposes. The experience I have benefitted from has led to introduction or developed of all the subject that I focused my scientific research all these years in the curriculum of the *Touristic arrangements and development* master degree specialization, and the appropriate study support materials were published for each course. It is also noteworthy that these subjects are included in other European universities' curricula.

In the part dedicated to the **Academic and professional perspectives of research activities**, the guidelines for scientific research are highlighted in the field of **tourism geography** and of other complementary fields of interest (Touristic prospection, Touristic arrangement, Rural tourism and agritourism). The academic perspective is also based on the obtaining of the habilitation diploma, this step ensuring the status of doctoral coordinator within the Faculty of Geography from Babeş-Bolyai University in Cluj-Napoca.

The part dedicated to **bibliographic references** contains both the academic publishing of the candidate (as author or coauthor) to which reference was made and were used in this thesis, as well as those papers and authors cited in these references. We mention that ten representative articles of the candidate are marked in bold type characters.