

ROMANIA

a healing experience



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ROMANIA'S NATURAL CURE RESOURCES

Mineral and thermal springs: over 2500 springs and boreholes (1/3 of Europe's springs) with

- ❖ oligomineral waters (Călimănești-Căciulata, Olănești, Slănic Moldova),
- ❖ alkaline waters (Borsec, Covasna, Sângeorgiu de Mureș, Buziaș),
- ❖ chloride-sodium mineral waters (Sovata, Praid, Ocna Sibiului, Ocna Șugatag),
- ❖ carbonated mineral waters (Geoagiu-Bai), sulphurous mineral waters (Govora, Călimănești-Căciulata, Olănești, Herculane, Pucioasa, Mangalia),
- ❖ sulphated mineral waters (Amara, Oglinzi), ferruginous mineral waters (Buziaș, Tușnad, Biborțeni),
- ❖ iodized mineral waters (Olănești, Călimănești-Căciulata, Govora), arsenic mineral waters (Covasna),
- ❖ radioactive mineral waters (Herculane, Felix, Sângeorz Băi, Tușnad, Balvanyos),
- ❖ geothermal and thermomineral waters (Herculane, Felix, 1 Mai, Moneasa, Geoagiu Băi, Călimănești);

Therapeutic lakes: Techirghiol, Amara, Lacul Sarat, Balta Albă, Ursu;

Therapeutic muds: Techirghiol, Bazna, Sovata, Amara, Ocna Sibiului, Vatra Dornei, Ocnele Mari, Govora;

Therapeutic gases - mofettas: Tușnad, Covasna, Balvanyos, Borsec, Buziaș;

Therapeutic salt mines: Praid, Târgu Ocna, Ocnele Mari, Cacica, Slănic Prahova, Turda;

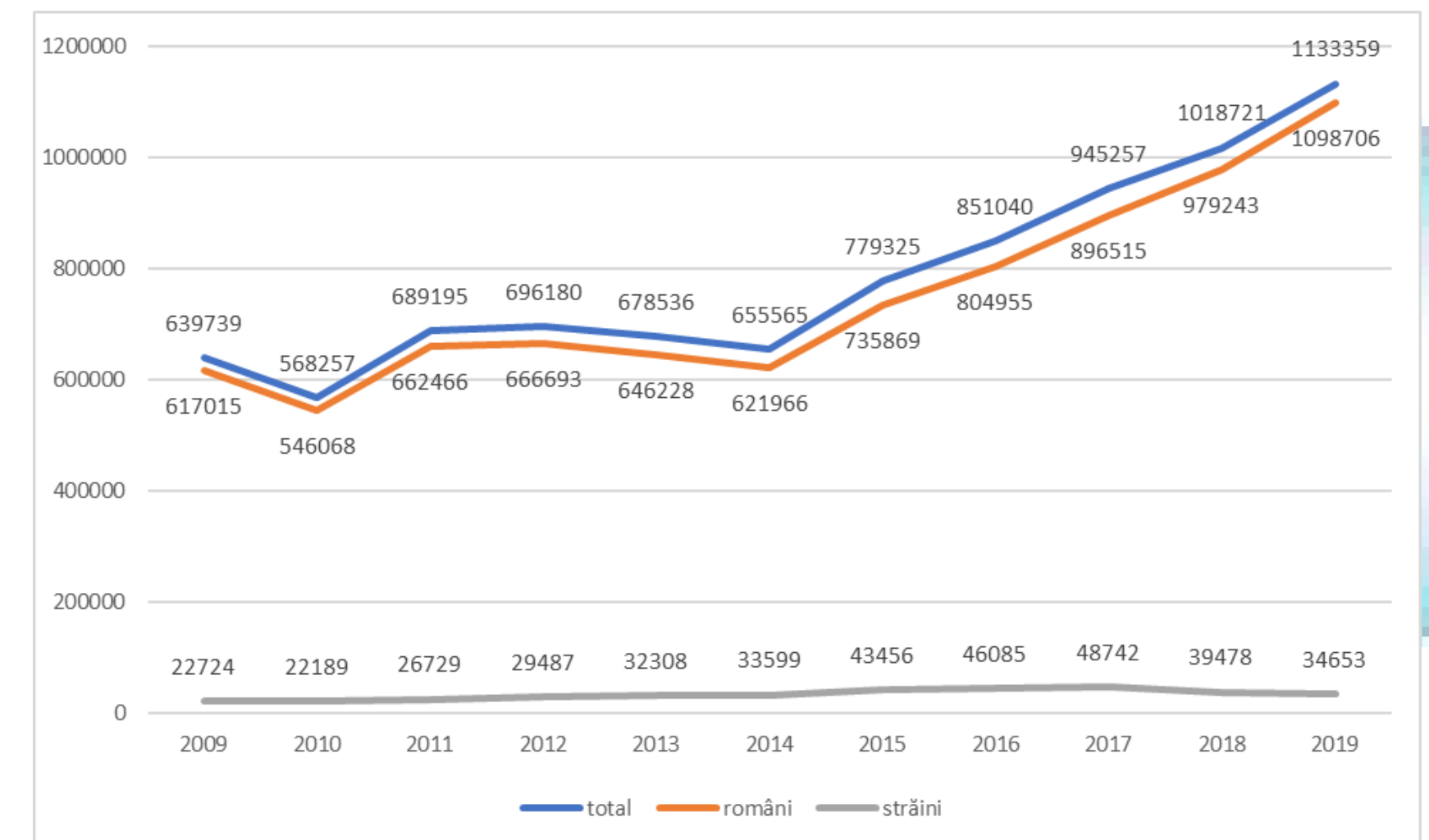
The Black Sea coast, with three natural therapeutic factors: sea waves (thalassotherapy), sand (psanotherapy) and marine aerosols.

BALNEARY SPAS

- ❑ **33 balneoclimatic and balneary spa resorts**, including: Băile Felix, Geoagiu-Băi, Slănic Moldova, Călimănești-Căciulata, Călacea Băi, Ocna Șugatag, Mangalia, Sângeorz-Băi, Covasna, Pucioasa, Băile Tușnad, Sovata B, , Techirghiol, Amara, Eforie
 - ✓ 25 internationally recognized resorts;
 - ✓ the best known from the Roman Era: Băile Felix, Băile Herculane, Geoagiu-Băi (Germisara), Ocna Sibiului, etc;
 - ✓ from the sec. XV-XIX: Vatra Dornei, Govora, Slănic Moldova, Buziaș, Sângeorz – Băi, Oglinzi, Slănic Prahova, Băile Olanesti, Călimănesti-Căciulata.
- ❑ 600 hotels inside the balneary resorts counting for more than 7% from the total national wide
- ❑ In the last 10 years there was an intense volume of private investment in balneary resorts, upscaling location to 3 and 4 stars with modern spas (medical&wellness)

SPA BUSINESS INDICATORS

- **40.000 accommodation places** throughout the country, to which are added about 10,000 places on the Seaside, almost 10% from the total in Romanian tourism
- **Labor force employed** in balneary tourism: about **10.000 jobs**, including medical staff in the treatment centers
- **Tourist arrivals in balneary spas:** about 1 million annually of which about 10% foreign tourists (from Germany, Israel, Belgium, France, Italy, Norway, Sweden, Russia, etc.)
- **Average length of stay in balneary spas:** 6.5 days (the highest index in tourism, compared to 2-2.5 days for other forms of tourism)
- **Cumulated turnover for OPTBR member companies:** over 150 million Euro / year



CHALLENGES FOR ROMANIAN BALNEARY INDUSTRY



❑ **Balneary offer** – based mainly on the public social system → low revenues = no investments funds

- small number of recreation projects inside the resorts

❑ **Huge number of balneary resources, but insufficiently developed and used**

It is estimated that only 10% of the therapeutical mineral water were exploited and used in current balneary treatment.

❑ **Cultural patrimony**: most of the resorts were developed from sec. XV or even Roman era, so they are having many historical buildings and spa related baths (ex Baile Herculane), but in an advanced stage of degradation. Also in the last years there was a chaotic development of new investments.

❑ **Work force**

✓ decreased number of qualified therapists and doctors on top of the crisis of HR in tourism generally until 2020

✓ lack of managers of destination to develop auxiliary spa services together with the ecotourism

✓ depopulation of the certain areas, low number of highly graduated specialists or qualified workers, aged population

✓ seasonality

❑ **Implementing the 2011/24/UE Directive** on the application of patients' rights in cross-border healthcare – not developed until now due to:

✓ the difficulties in information and bureaucracy for the potential beneficiaries

✓ lack of accreditation – requested by individual guests but also by the insurance companies

OPPORTUNITIES FOR ROMANIAN BALNEARY INDUSTRY

- ❑ Focus on the Green Balneary cures **“THE FOREST BATHING”** – complementary therapies of the balneary and wellness treatments in unique and special places (forests, beaches, delta), getting in connection with the “mother nature”
- ❑ Creating a **national DMO (Destination Management Organization) for the developing of the health tourism** - a public-private partnership to support the **2011/24/UE Directive** to make the Romanian offer visible and to target more efficiently the client on the EU market
- ❑ Developing a **national balneal-touristic cluster** – to create the framework for a sustainable development of the balneary tourism and synergies between health tourism and ecotourism:
 - ✓ promoting on the international market of combined touristic products (balneary and ecotourism)
 - ✓ synergy between the balneary and wellness tourism, a holistic approach (physical, mental, emotional)
 - ✓ funding these innovative products
 - ✓ developing urban environment standards for the balneary resorts

OPPORTUNITIES FOR ROMANIAN BALNEARY INDUSTRY

- ❑ **Fiscal incentives and funding opportunities** to support the modernization of the accommodation and medical spas
 - ✓ Reduced VAT
 - ✓ Health vouchers
 - ✓ EU and national funding for balneary facilities and for protecting the natural resources
 - ✓ EU funds to exploit new natural factors where there are no resorts yet
 - ✓ National funds for recreation projects and for rehabilitation of the cultural & historical assets in resorts
 - ✓ National funds for training and development of the balneary staff
- ❑ Setting up and implementing of a national **communication plan**
 - ✓ marketing national campaign to promote balneary resorts but also Romania as balneary destination, integrating medical, antiaging, wellness activities with ecotourism
 - ✓ developing studies/surveys to establish the target market, the products to offer and the distribution channel for each segment
- ❑ Developing **cures and products for antiaging fight** – to create the framework for a sustainable development of the balneary tourism and synergies between health tourism and ecotourism
 - ✓ studies to prove the effects of natural resources in combating the aging problems
 - ✓ publishing the articles , attending conferences for this specialty
 - ✓ creating antiaging products based on thermal/mineral water and muds

FUTURE CHALLENGES AND OPPORTUNITIES - COVID 19 PANDEMIC

- Balneary tourism was the worst affected due to the imposed restrictions
- Closing of the balneary and spa centers and indoor pools limited the touristic movement in the health resorts

Support from the state government for:

- Maintaining the activity in the balneary and health resorts – *see the European Manifesto*
- Keeping the jobs for thousands of highly trained personnel in balneary cures
- Helping investors to maintain their faith in the future development of the resorts – *see EU Plan for Recovery and Resiliency*
- Good communication on public level related to the benefits of the balneary and wellness cures for the human immunity, using the natural resources which on long term can reduce the chronic diseases and costs of hospitalization

Balneology – an European know-how inheritance – could become the second front against the chronic diseases and in supporting the drug treatment for better results, considering that the pandemic proved that we have to focus on preventing and treating the causes by **changing the lifestyle and improving the immune system.**

The spa programs has to have a medical dimension but also a wellness one:

- Personalized medical consult
- Balneary treatment with natural factors (muds, argils, therapeutical waters, plants, salts, etc)
- Romanian well-known brands (*Gerovital, PellAmar*)
- Aesthetic procedures
- Coaching on healthy lifestyle, food hygiene, importance of exercise, correct connection with nature, rest, stress control, quitting smoking
- Outside exercise in the resort nature
- Evaluation and recommendation at the end of the program
- Following up by feed-back and suggestions from the guests

Organization of Investors in Balneary Tourism (OPTBR)

- established in 1993, at the initiative of 19 representatives from the main balneary resorts, supporters of spa tourism
- the purpose was to represent the balneary sector in relations with the authorities, various institutions and other associations, internally and externally
- the founding members represented the resorts: Băile Herculane, Băile Felix, Băile Govora, Călimanești-Căciulata, Sângeorz-Băi, Vatra Dornei, Mangalia, Sovata, Lacu Sărat, Slănic-Moldova, Buziaș

Main objectives:

- promoting local and international - wise the balneary heritage and relations with other associative, employers, professional structures, to create a climate of fair competition
- representing its members in relevant international organizations and providing useful information for the development of activities and investments
- establishing public-private partnerships in order to attract structural funds for the development of balneary spas
- setting-up programs for the development and protection of the national balneoclimatic heritage
- organizing courses and trainings of highly qualified and / or professional and managerial staff for the field of balneary tourism
- conducting or participation in marketing studies and researches, programs, projects

OPTBR partnerships

- member of the European Spas Association, ESPA, since 2006; since 2008 also holds the position of ESPA vice president, now through Mrs. Iuliana Tasiu (OPTBR's VicePresident), re - elected for the third time in this capacity, until 2021.
- founding member of the Alliance for Tourism, a formal platform for collaboration between its members, organizations that aim to develop the tourism sector in Romania and that respect legal and ethical principles in business.

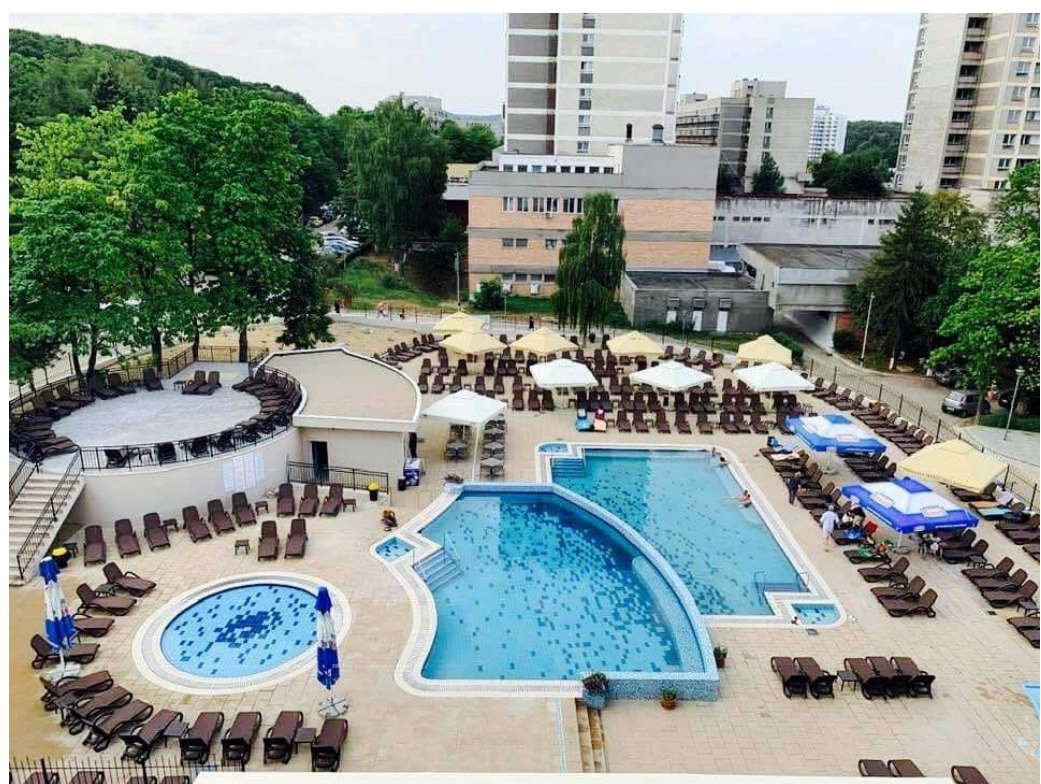
OPTBR has **cooperation protocols** with:

- Hungarian Spa Association
- National Institute of Recovery, Physical Medicine, Medical Recovery and Balneoclimatology
- National Association of Resort Cities (ANSTR)
- National Association of Travel Agencies (ANAT)
- National Association for Rural and Cultural Tourism (ANTREC)
- Romanian Balneology Association (ARB)
- Amphitheater Foundation
- Federation of Tourism Promotion Associations (FAPT)

the purpose of these protocols is to contribute to a better and coherent development of this field

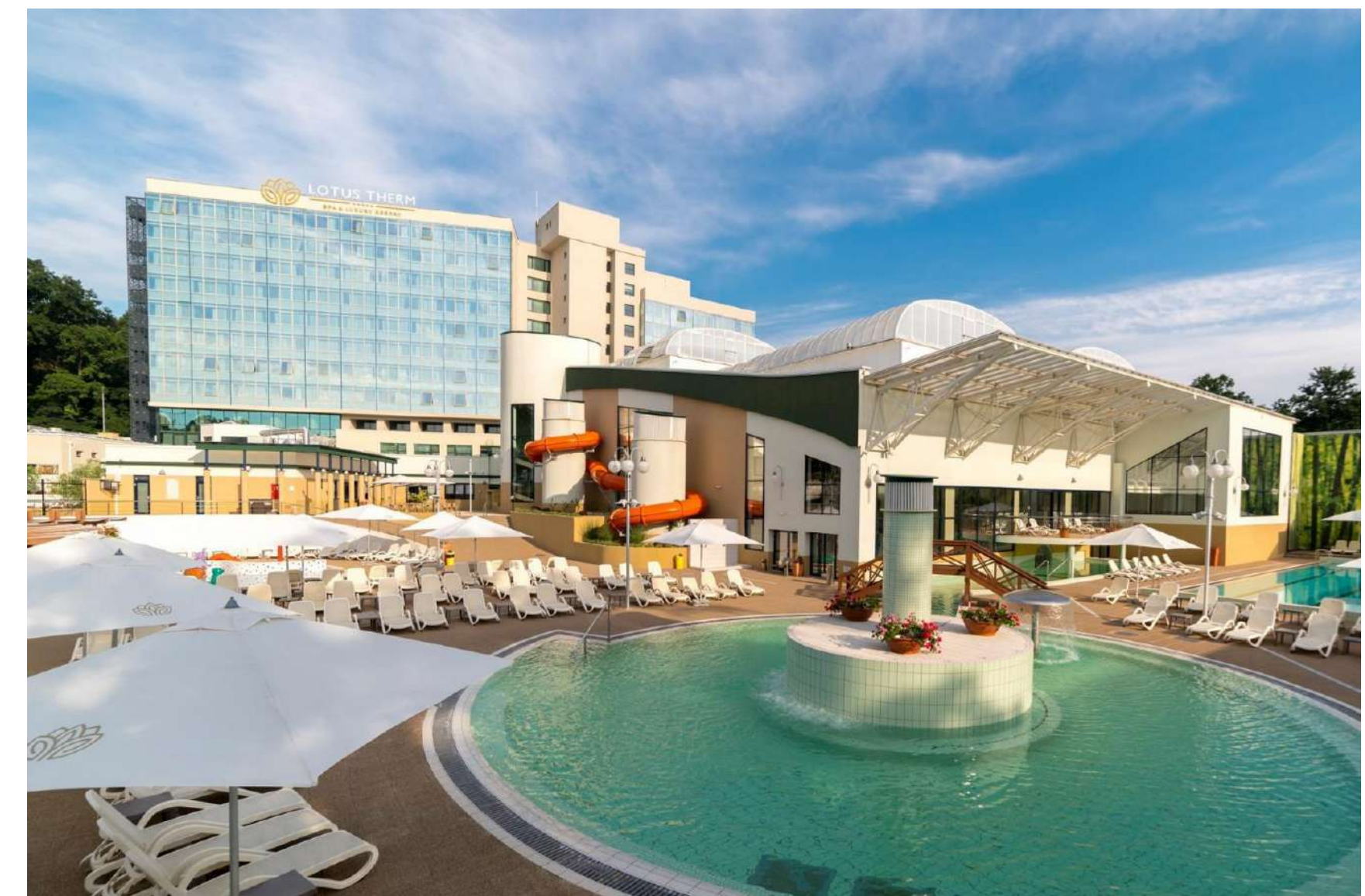


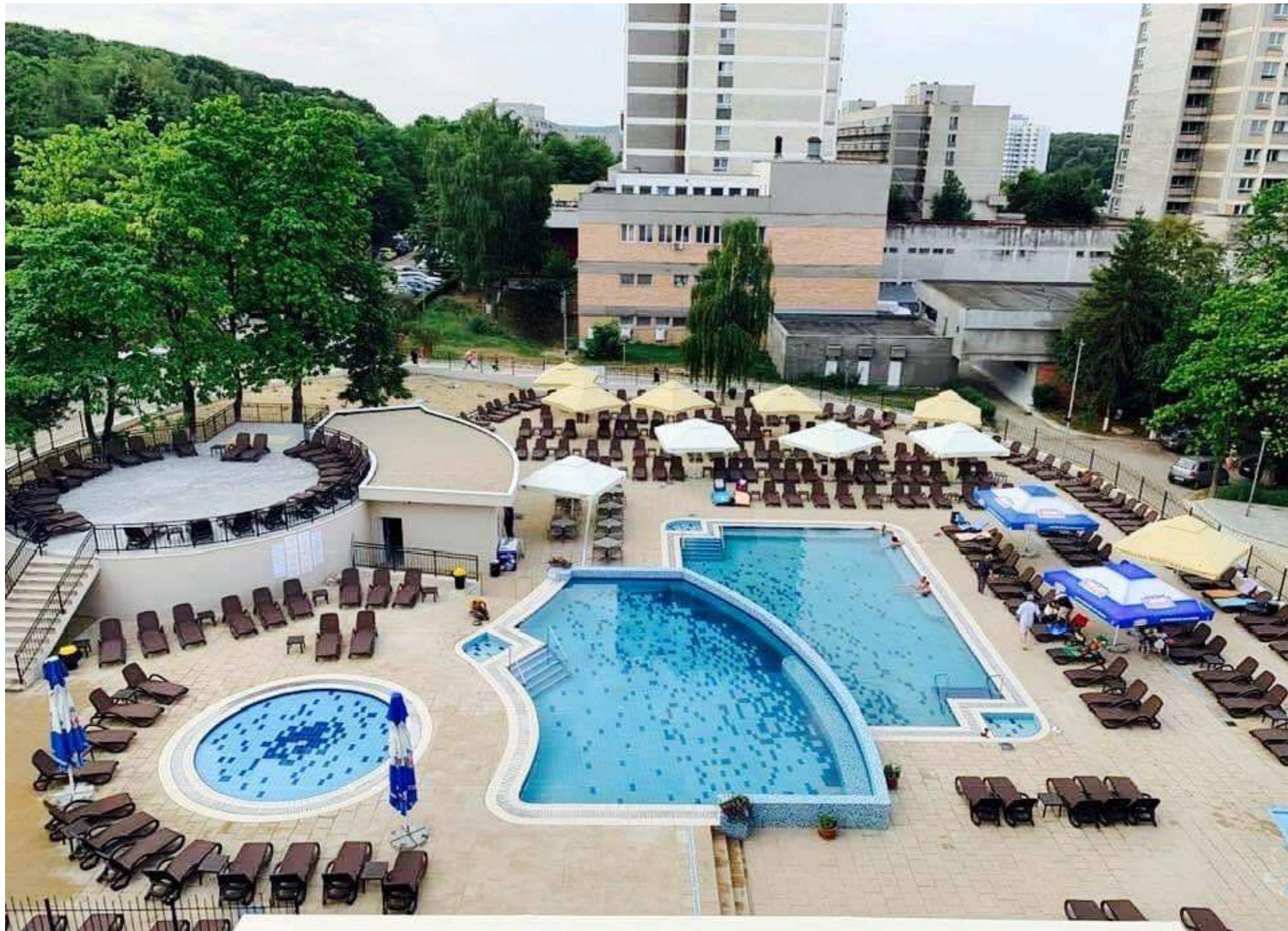
OPTBR MEMBERS



Lotus Therm & Luxury Resort (Băile Felix)

- the only 5-star thermal complex in Romania,
- investment of almost 30 million euros,
- 180 rooms and 262 beds,
- Felixarium - aquapark with 14 indoor and outdoor pools, jacuzzi, caves, waterfalls, 2 slides, dining areas, beach volleyball court,
- GOLD SPA center with 3 types of sauna and ice room,
- Nelumbo Med-SPA - services and therapies: hydrotherapy, mud packs and baths, paraffin wraps, electrotherapy, hydrokinetotherapy, kinetotherapy, massages, indoor thermal pools, cosmetics.





Turism Felix (Băile Felix)

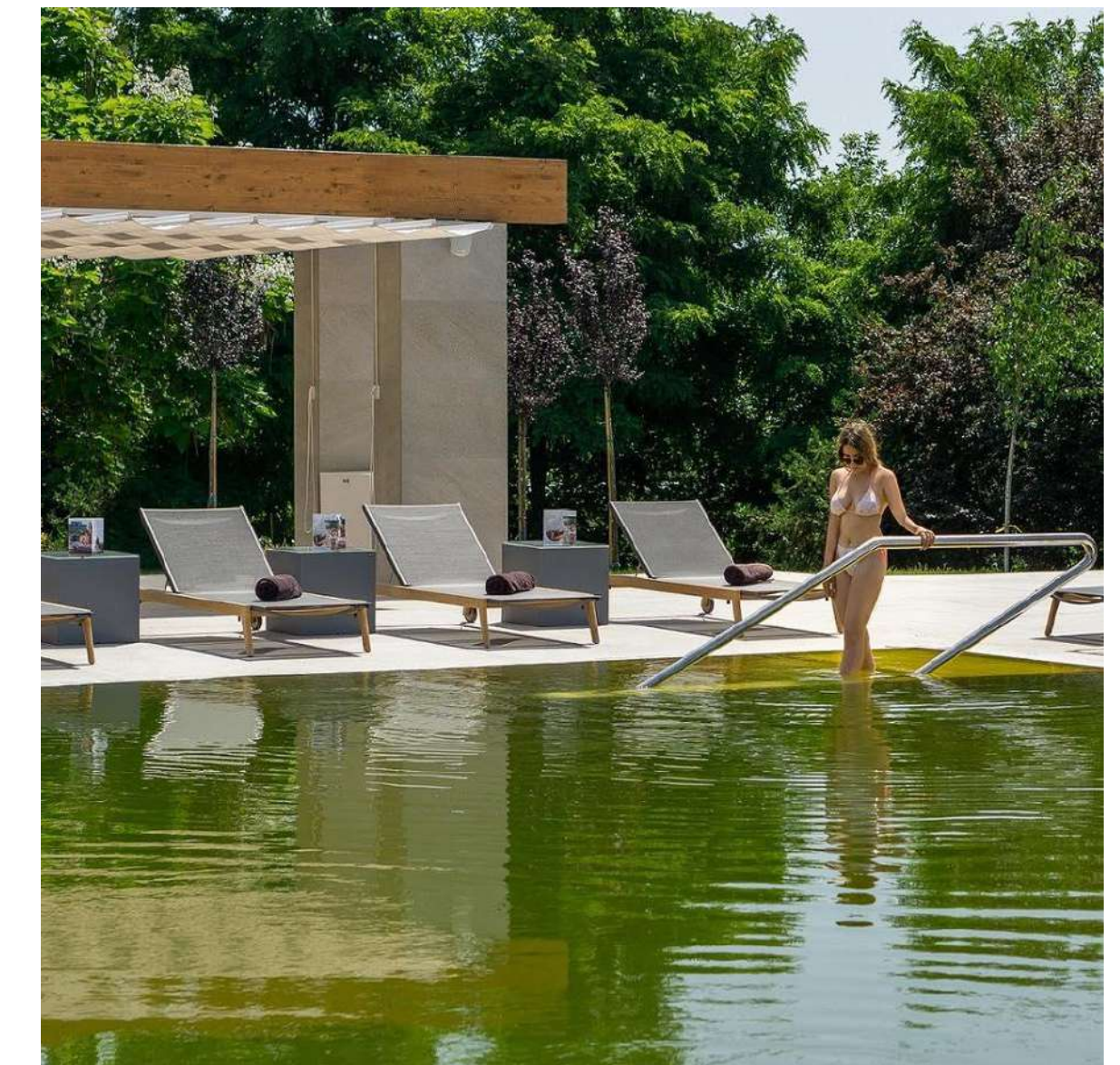
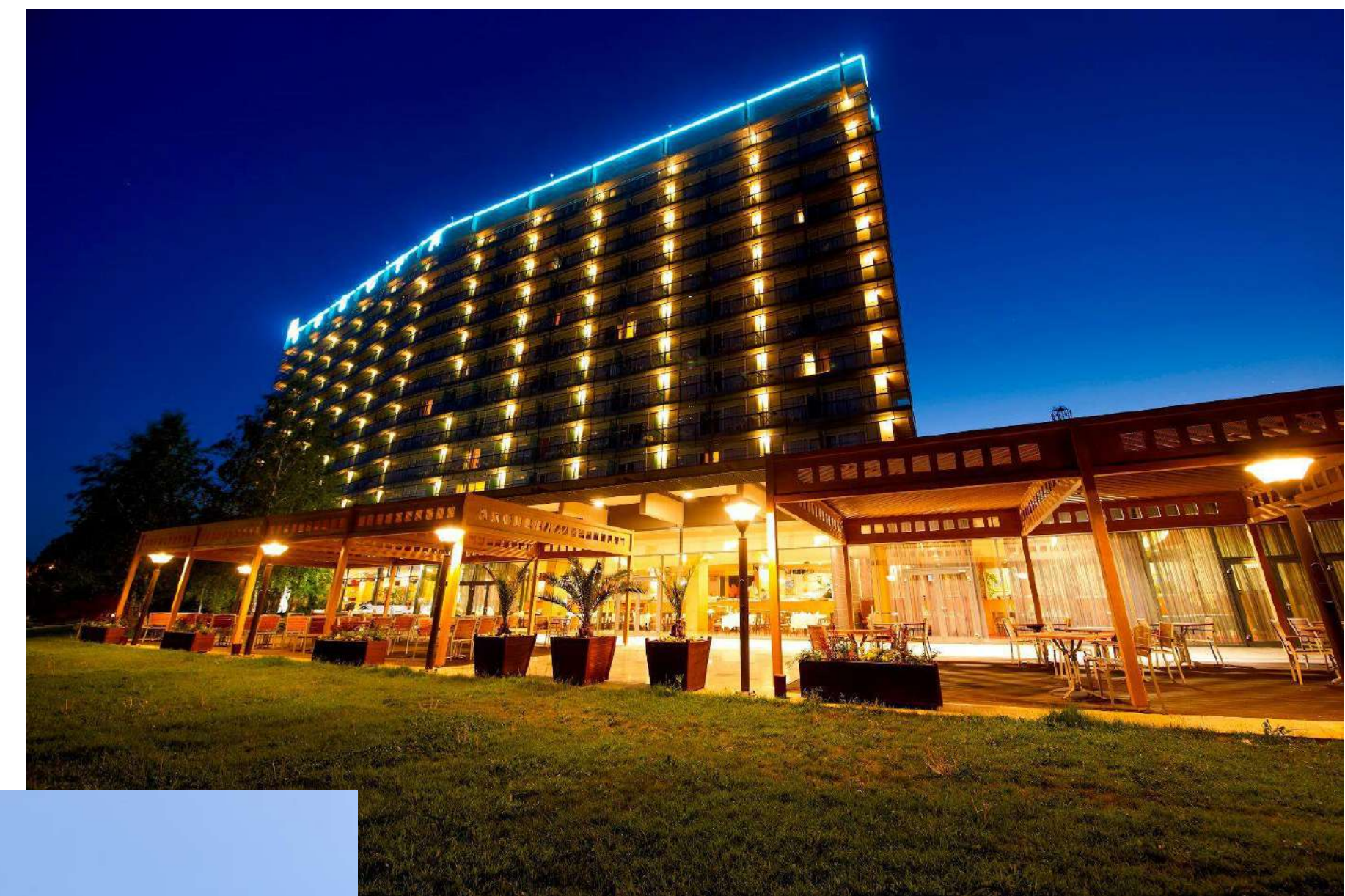
The main attractions revolve around thermal water:

- swimming pools, beach,
- high-performance treatment and recovery centers,
- SPA centers,
- 6 hotels from 5 stars to 2 stars,
- international certifications TÜV, ISO 9001 and EUROPESPA-med.



Europa Hotel 4* (Eforie Nord)

- since 2003, part of the Ana Hotels group, when it was completely renovated and redecorated,
- 221 rooms with sea view,
- the restaurant and the adjacent terrace can accommodate up to 400 people,
- a complex of several conference rooms,
- a garden with an area of over 30,000 square meters, where is located the outdoor freshwater pool,
- *the pool with water from Lake Techirghiol* - investment of 1.2 million euros, unique in Romania ,
- balneary-spa and wellness ANA Aslan Health SPA - healing therapies and spa treatments, ancient relaxation and stress relief techniques with state-of-the-art wellness and beauty procedures.



Ensana Health Spa Hotel (Sovata)

- wellness services in a unique mountain resort in Europe, through the heliothermal salt lake Ursu and through the balneoclimateric qualities it offers to tourists for more than 140 years;
- the Hungarian hotel chain Ensana owns 3 hotels in Sovata: Sovata Health Spa Resort 4*, Brădet Health Spa Resort 4* and Ursina Health Spa Hotel 3*;
- a total of 800 accommodation places in almost 400 double rooms;
- Ursina, the most recent investment (8 million euros), opened this summer includes a 985 square meter spa, a spacious balneary center, salt water treatments, salt and fresh water pools, underwater elongation pools, Kneipp pools, saunas, massage and relaxation rooms and a generous area for medical, maintenance and beauty treatments.



Tusnad Resort

Hotel O3zone

- based on the concept of Spa, Nature & Conferences,
- 117 rooms, restaurant, 2 bars,
- indoor pool, fitness room, table tennis,
- 3 conference rooms with capacities between 25 and 200 seats,
- SPA center.

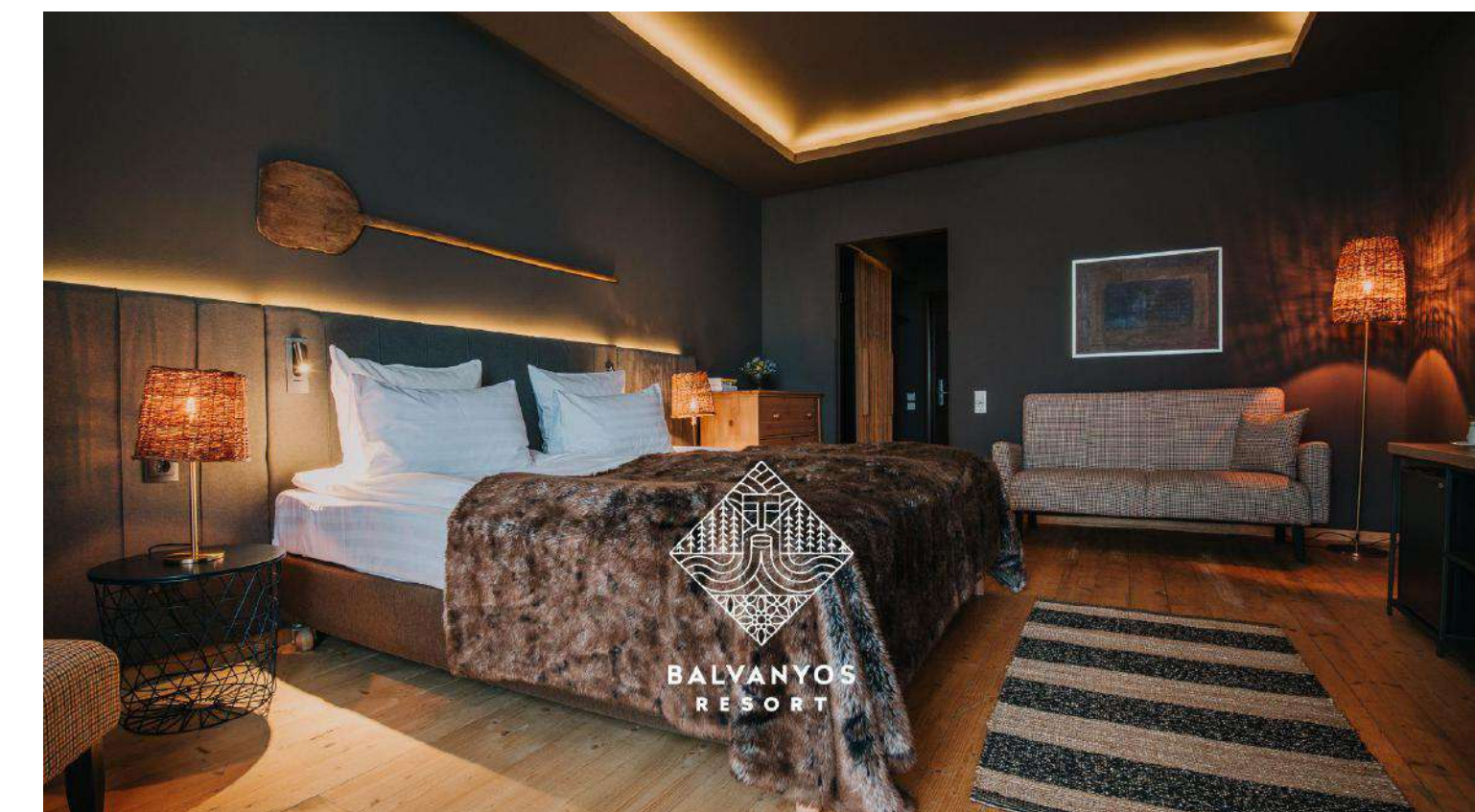
Hotel Tusnad

- 108 rooms,
- classic restaurant, day bar,
- treatment center with natural therapeutic factors: carbonated mineral waters, mofetta, physical medicine procedures and physiotherapy.



Balvanyos Resort

- Grand Hotel Balvanyos: 102 4-star rooms,
- Grand Santerra Spa: vision - prevention is the medicine of the future,
- Balvanyos Adventure Park: trails of progressive difficulty,
- 3 restaurants: Forest, GastroLab, Fork.



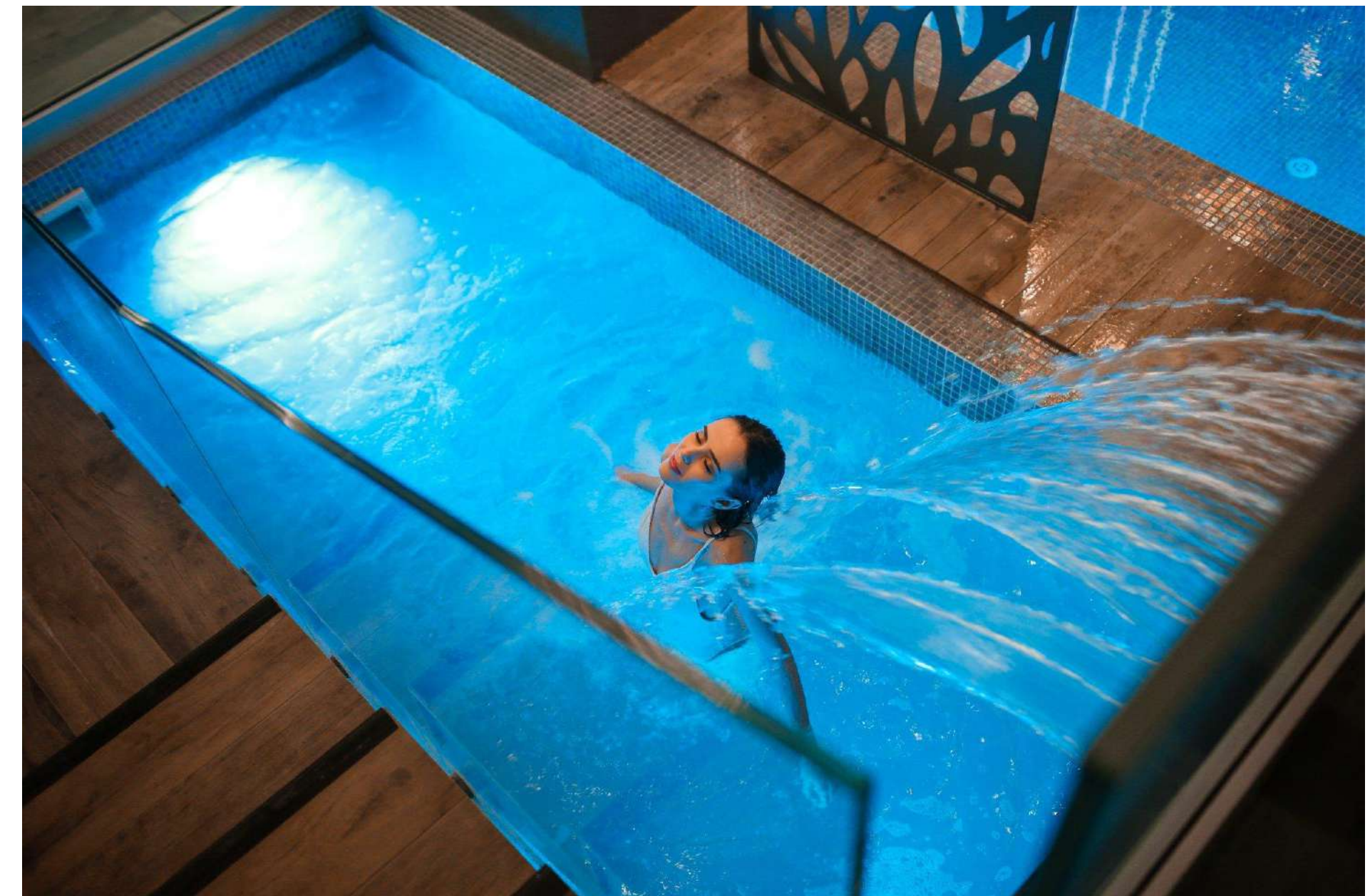
Bacolux Hotels (Băile Herculane)

Afrodita Resort & Spa

- certification of 4 stars, 220 rooms,
- two restaurants, Premier and Labirinth,
- two fully equipped conference rooms,
- Herculum Spa combines two traditions, wellness and balneo, aims at total relaxation, surface 1500 sqm , 4 types of sauna, swimming pools,
- "Innovative SPA Concept" ESPA Innovation Awards 2019

Diana Resort

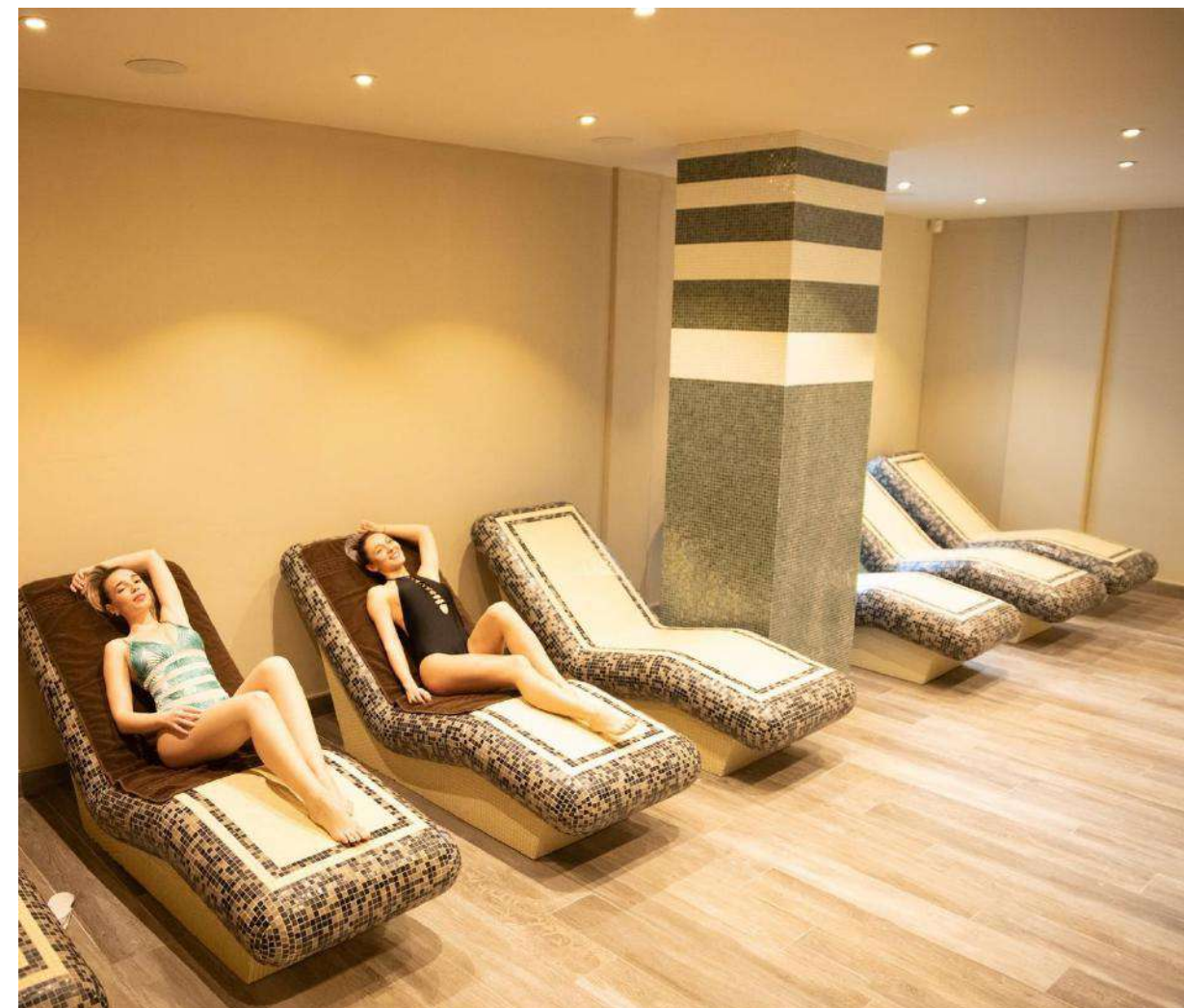
- 220 rooms,
- indoor and outdoor pool,
- two restaurants,
- conference rooms,
- European level treatment center, supplied with thermosulfur water from its own source.





Olănești Hotel & Medical Spa

- completely renovated interior in 2018,
- 204 refurbished rooms,
- restaurant,
- conference room,
- Medical Spa Center equipped with state-of-the-art medical equipment;
- sulfurous mineral water therapy, shock wave therapy (Shockwave Therapy), revolutionary Super inductive system technology, pneumatic pressure therapy (Btl lymphastim).





Palace Hotel (Băile Govora)

- historical monument built between 1911-1914,
- was the first hotel with a treatment center in Romania,
- the architecture is eclectic, with art nouveau influences and elements of neo-Romanian architecture.
- was built in Băile Govora Park, the largest balneo park in Romania.
- extensive rehabilitation completed in 2013
- 132 4 * and 3 * rooms,
- restaurant with a special architecture,
- English-style day bar,
- terrace open to the resort park,
- treatment center for recovery and prevention
- modern spa



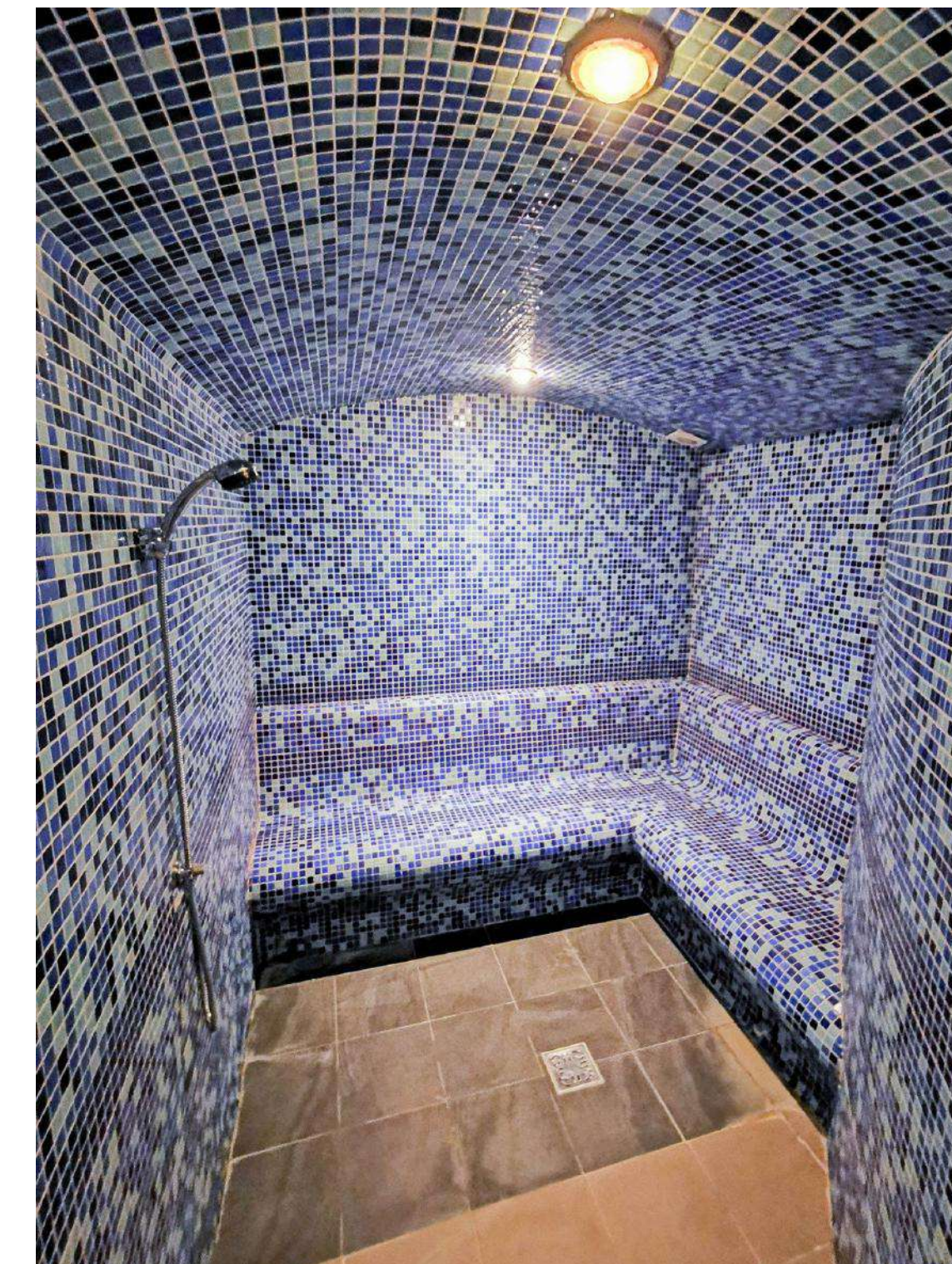
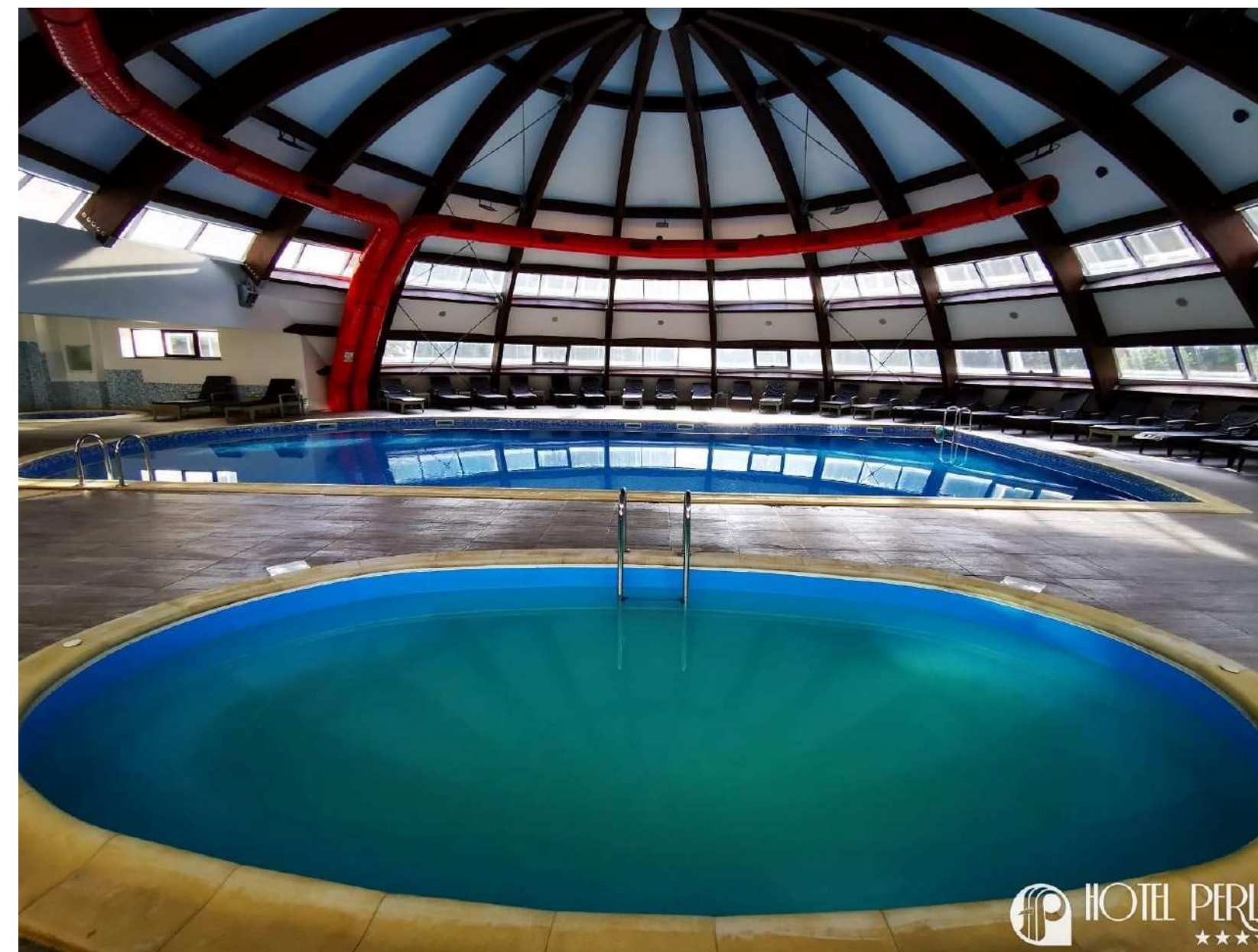
Călimanești-Căciulata resort

- 2 treatment centers located in the Cozia Spa Complex and in the Central Hotel
- 6,500 procedures per day,
- 2,000 accommodation places,
- 20 swimming pools,
- 8 conference rooms
- international certifications ISO 9001,14001,22000.



Perla Hotel 4* (Slănic-Moldova)

- completely renovated and modernized in 2016,
- 85 rooms and apartments,
- conference center,
- two restaurants,
- a modern SPA center,
- treatment center with the latest generation equipment.



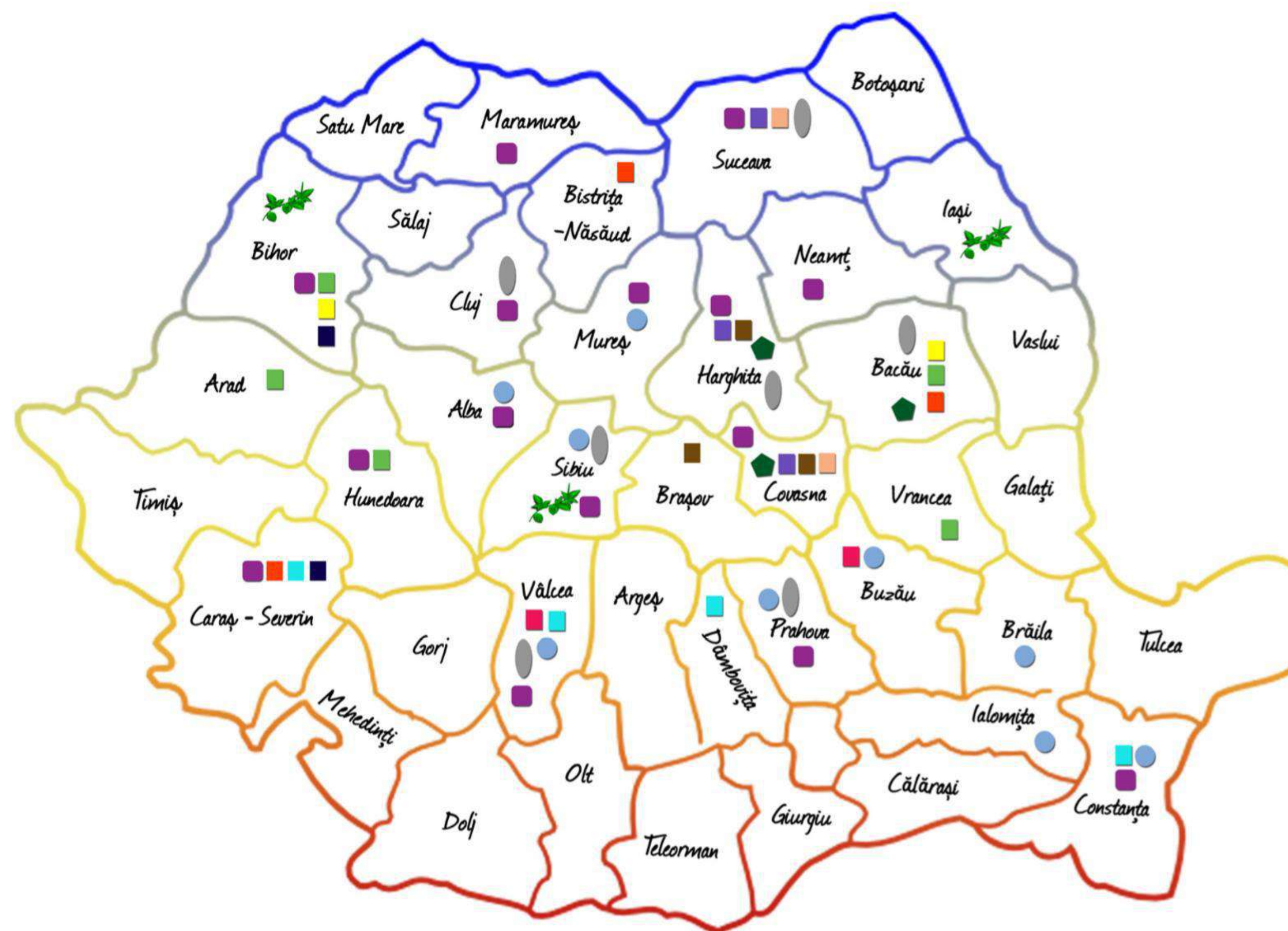


Buziaș Complex

- Phoenix 4 * hotel - new concept, fusion between classic elements of high hotel standard and contemporary technological accents.
- Parc 3 * hotel for treatment or relaxation
- Health Center - various therapeutic procedures: physiotherapy, physiotherapy, hydrotherapy, halotherapy, lymphatic drainage, therapeutic massage, relaxation, toning, local applications with beeswax, galvanic baths .

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Legend

- carbonated waters
- oligo-mineral waters
- alkaline waters
- ferruginous waters
- chlorosodic waters
- sulphurous waters
- iodine waters
- radioactive waters
- arsenical waters
- therapeutic lakes
- ◆ mofettes
- salt mines
- ✦ phytotherapy
- climatic cure factors