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WP7 – COMPREHENSIVE STRATEGY

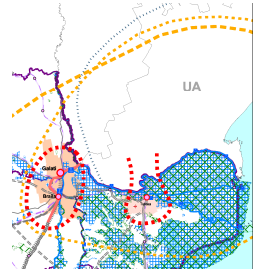
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ARGE Subregion RMU. Analyses and comparisons

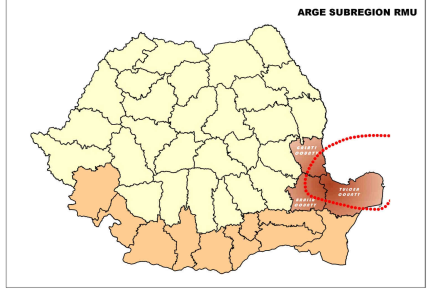


- Is situated on the territory of Romania, Moldavia and Ukraine, including the Danube Delta.
- Most important centers of the Romanian RMU subregion are Galati, Braila and Tulcea cities
- Most of the area lies in Moldavia and Ukraine, which were not project partners in the previous DONAUREGIONEN project.
- According to previous results of the DR project, this area is economically stagnating
- In the RMU subregion can be found two cross-border regions.

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ARGE SUBREGION RMU



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1) SWOT ANALYSIS

GS	STRENGTHS	WEAKNESSES
NC	<ul style="list-style-type: none"> The Danube Delta with specific biodiversity and landscape, the Braila Pond (Balta Braila) More than 120 protected areas, most of them (70) in Tulcea county: the National Park Macinului Mountains, the Danube Delta Biosphere Reserve (also Ramsar site), NATURA 2000 sites Specific natural resources: oil and gas, mineral water, salt lakes, fertile soils in Braila county Rich hydrographic network with rich surface water resources Spas, agro-touristic pensions, fishing and hunting areas Programs regarding the ecological restoration, waste management, cross-border cooperation with Ukraine on nature protection A complex system of embankments (against the floods), especially in Braila county 	<ul style="list-style-type: none"> Anthropic processes endanger the natural environment integrity in Danube Delta Illegal landfills for household waste Insufficient protection of localities against floods (inappropriate dams) Large and areas in Braila county Low share of forest areas in Braila and Galati counties Localities without water supply, sewerage and water treatment stations Lack of ring roads around the cities Insufficient points of selective waste disposal Flood risk areas Lack of initiative in collecting funds for the management of protected areas Lack of household and industrial landfills according to European standards
SSHR	<ul style="list-style-type: none"> The unemployment rate decreased in the period 1996-2008 in the region Galati-Braila urban system, unique in Romania, important regional pole, important industrial, administrative and cultural center The biggest urban agglomeration following Bucharest (approx. 580.000 inhabitants) 	<ul style="list-style-type: none"> Major demographic decline Major urban-rural disparities regarding the access at medical educational services Insufficient medical endowment, insufficient medical personnel, especially in rural area

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1) SWOT ANALYSIS

GS	STRENGTHS	WEAKNESSES
T	<ul style="list-style-type: none"> 2 pan-European transport corridors: VII and IX Ports of international importance (Braila, Galati, Tulcea and Sulina, the national airport in Tulcea) The strategic location of the region (Danube Delta and Black Sea area, border with Ukraine and Moldova) 	<ul style="list-style-type: none"> Low level of the transport network quality Low roads and railroads and density, less than the national average. In-modernized rail infrastructure Difficult accessibility in the Eastern part of the territory and in the Danube Delta area Lack of direct road link with Dobrogea (only ferry)
TI	<ul style="list-style-type: none"> A relative uniform distribution of the railroad network (radial towards West) Most localities are connected to the state drinking water system. 	<ul style="list-style-type: none"> Insufficient development of the public services infrastructure and utilities Low endowment with wastewater stations Low equipment with natural gas Low connection to the drinking water network in rural area Very few drinking water stations, the existing ones being un-operating

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1) SWOT ANALYSIS

GS	STRENGTHS	WEAKNESSES
E	<ul style="list-style-type: none"> The tourism sector is well developed The SMEs sector is well developed Big productive units in Braila and Galati, representative at national and international level Diversified industry (metallurgic in Galati) and Tulcea: engineering works in Braila and Tecuci; naval in Galati, Braila, Tulcea; textile in Braila, Galati, Tulcea; food in most cities) Flexible, qualified, available and cheap labor force. The tendency of an increasing labor force in tertiary branch Advantageous area for a diversified structure of the vegetal production 	<ul style="list-style-type: none"> Low population income Lack of coherent policies and programs for the development of tourism Obsolete tourism infrastructure Productive activities are concentrated mainly in Braila and Galati municipalities Decrease of the number of employees in industry between 1989 and 2008 Low level of research and development expenditures.

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1) SWOT ANALYSIS

GS	OPPORTUNITIES	THREATS
NC	<ul style="list-style-type: none"> • A high interest at national level in order to conserve the biodiversity • High potential in agricultural area • The most important fishy potential at national level • The possibility to develop the cross-border cooperation on environment protection within the euro-regions • Development of eco-tourism, increasing the demand of ecological products • Many financing possibilities in the environmental field • The emplacement of Braila, Galati and Tulcea municipalities on the Danube river • Link with the Black Sea 	<ul style="list-style-type: none"> • High natural risk, extreme climatic phenomena • Increasing of the naval traffic and new international waterways (Bistriche channel) in the Danube Delta • The uncontrolled development of economic environment with negative impact upon the natural environment • The threats coming from outside the Danube Delta Biosphere Reserve • Poor development of essential infrastructure (drinking water supply, wastewater treatment, waste management) • The increasing pressure upon natural resources and landscape
SSHR	<ul style="list-style-type: none"> • Opportunity of cooperation in a territorial system that includes Tulcea municipality • The University « Dunarea de Jos » (Low Danube) having branches in Braila and Galati 	<ul style="list-style-type: none"> • Lack of support of the urban system Braila- Galati by a urban network of localities having approx. 12000 inhabitants • The Braila-Galati urban system is surrounded by a vast rural territory • The risk of departure of the medical personnel from the area • The risk of abandoning the area looking for new working places

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1) SWOT ANALYSIS

GS	OPPORTUNITIES	THREATS
T	<ul style="list-style-type: none"> • High potential for the river transport development (the Danube) • The traffic of goods can be switch from road to railroad, fluvial and air transport • Pan-European corridor no.7 (the Danube) • Braila and Galati ports • A project of a bridge crossing the Danube • A project for a express road Braila-Galati 	<ul style="list-style-type: none"> • Lack of a rapid link on long distances (airport) • Risk of isolation towards the major transport terrestrial arteries (lack of a Danube bridge, highways, express roads)
TI	<ul style="list-style-type: none"> • Increasing the utilization of renewable resources (biomass, hydroelectricity, wind, solar, geo-thermal), increasing the economic growth. 	<ul style="list-style-type: none"> • High pollution risk – wastewater is flowing directly into the Danube • Possibility that some components of the water and wastewater network to deteriorate and to produce serious damages

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1) SWOT ANALYSIS

GS	OPPORTUNITIES	THREATS
E	<ul style="list-style-type: none"> • High productive potential in agriculture and pisciculture, the most important fish potential at national level. • Projects in course to achieve industrial parks in Braila and Galati 	<ul style="list-style-type: none"> • Increasing of the process of des-industrialization. • Risk of moving of some industrial sectors towards external locations (Republic of Moldova and Ukraine), due to the low costs from here.

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2) Definition of indicators characterizing the social-economic situation of the D+ region area

Indicator	1996	2001	2005	2008
Water pollution index				
Atmosph.pollution SO ₂ – emissions in t/1000 inh.	13.204	16.502	14.522	11.442
Atmosph.pollution NO ₂ – emissions in t/1000 inh.	15.840	14.437	11.045	14.482
Atmosph.pollution ash – emissions in t/1000 inh.				
Atmosph.pollution CO – emissions in t/1000 inh.	8.905	8.133	10.319	15.372
Landfills	1001.3	1004	353.446	4674
Number of dwellings per 1000 inhabitants	326.576	342.262	358.590	367.186
Number of university students per 1000 inh.	7.509	13.834	16.418	18.239
Regional vitality index	266,9	143,2	109,0	89,0

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Indicator	1996	2001	2005	2008
Road Transport – Density of Highways	0	0	0	0
Railway transport – Density of Railways	0.0293	0.0297	0.0338	0.0320
Water transport - freight transferred				
Water transport – accessibility of ports	84.86	84.86	84.86	84.86
Air Transport – airports accessibility				
Electric energy supply		97.16		100
Natural gas				
Broadband (internet connection, >256 kbit/s)				
Drinking water supply	62.6	63	64.6	76

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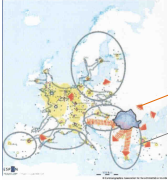
Indicator	1996	2001	2005	2008
Wastewater treatment	21.1	46.3	35.2	35.8
Renewable energy sources				
Regional GDP per capita in PPS as a share of EU 27(25) average (%)	23.6 (1998)	21.5	26.07	28 (2006)
Labor force participation rate (%)	61.8	56.4	51.6	52.2
Unemployment rate in the region (%)	14.2 (1998)	10.3	7.0	5.1
Number of employed in tertiary branch (%)	36.9	34.4	40.6	43.7
Share of college and secondary school educated inhabitants		62.6		
Tourism – average guest nights		2.84	2.64	2.8
Tourism – foreign visitors				

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3) The analysis and the evaluation of the national regional policies and spatial plans of the country

3.1. The settlement system
General overview



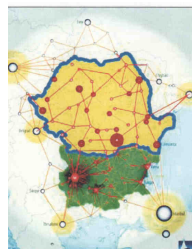
THE POTENTIAL OF TERRITORIAL CONNECTION

- Potential of territory connection
- Peripheral areas of emergent integration

The National Strategic Concept of Spatial Development 2007-2030
The general objective of the strategic concept is Romania's integration into the European Union by the assertion of its regional continental identity, by increasing the spatial cohesion and the sustainable territorial development. This document is applying the polycentric theory on the Romania's territory, offering a spatial perspective connected to the distribution of urban areas in a territory and to the networks of exchange and cooperation between urban areas at different levels.

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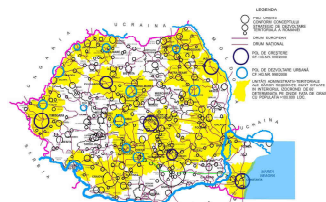
Possibilities to join the European network of poles and corridors of development

The main objectives of the National Strategic Concept of Spatial Development are:

- To join the European network of poles and corridors of spatial development
- To structure and develop the urban settlement network
- To assert the urban-rural solidarity by territory categories
- To strength and develop the interregional connection
- To valorize the natural and cultural heritage

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The National Strategic Concept of Spatial Development has as starting point the network of urban poles in Romania.

In the Danube area

- were selected, as **growing poles**, according to the Government decision no.998/2008, Constanta and Criulova municipalities.
- in the same year were selected as **poles of urban development**, Braila and Galati municipalities.

In the Danube area, the urban polycentric systems with development potentials (according to the National Strategic Concept) are:

- the Bucharest metropolitan system
- Constanta – Mangalia – Basarabi – Medgidia (Constanta county)
- Galati – Braila (Galati and Braila counties)
- Sibuzia – Calarasi – Fetești (Ialomița and Calarasi counties)
- Alexandria – Zimnicea – Turnu Magurele – Rosiori de Vede (Teleorman county)
- Resita – Caransebes (Caras – Severin county)

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Border regions in the area crossed by the Danube river

Romania-Bulgaria

- The Danube river borders the 2 counties on 470 km from a total of 631.3 km.
- The Danube river border raises the major problem of improving accessibility, since currently there is only the bridge in the area Giurgiu-Ruse. Soon it will function a new bridge in the area Calafat-Vidin.
- The counties involved on the Romanian-Bulgarian border are:
 - On the Romanian side: Mehedinți, Dolj, Olt, Teleorman, Giurgiu, Călărași, Constanța;
 - On the Bulgarian side: Vidin, Vratsa, Montana, Veliko Tărnovo, Pleven, Ruse, Silistra, Dobrich.

Romania – Serbia

- Almost half of the border between the two countries is the course of the river Danube (289.6 km)
- Unlike the Romania-Bulgaria border, here is a **relatively highly level of economic development of the regions located in the vicinity of the border**, which is a relevant fact, and to an **important degree of urbanization of the regions in both countries**. The weak points are the technical infrastructure on the territory of Serbia, due to the war in the Republic of Yugoslavia.

Romania - Moldavia

- The Danube river borders the 2 counties on only 600m. The Republic of Moldova is bordered by the Danube on its Southern extremity, at Giurgiulești.
- The regions located in the vicinity of the border have a significantly low economic development, with a high rate of unemployment. Environmental protection requires special consideration, also the transport infrastructure.

Romania – Ukraine

- The Danube borders the 2 countries on a distance of 169 km from 650 km, from the left side of the Danube near the confluence with the Prut river until close to the Black Sea, near Chilia branch.
- The two countries have a direct relationship with the Danube Delta natural reserve, and they have a beach on the shores of the Black Sea.

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Basic description of the settlement structure of the subregion, development trends and main conclusions

- The Romanian ARGE RMU subregion consists in 3 counties belonging to the Romanian South-East region: Braila, Galati and Tulcea.
- In July 2008, urban population in the Romanian ARGE RMU region was of 1 222 964 persons, less than 1991 with 102354 persons (8.4%).
- Share of urban population in total population had in 2008 a lower value than in 1991
- From the 3 counties belonging to this subregion, Braila county is the most urbanized (65% in 2008) and Tulcea county is the less urbanized (48.1%).
- In 2008, the subregion had 13 cities and municipalities and 146 communes (159 local administrative units), representing 17.5% from the total number of cities and municipalities from the DR* area in Romania.
- Most localities (93.7%) had in 2008 population between 500 and 10000 de inhabitants. Galati and Tulcea municipalities have between 20000 and 100000 inhabitants, Braila being the only city with a population higher than 100000.
- 38.9% of the population is concentrated in localities having between 2001 and 10000 inhabitants.

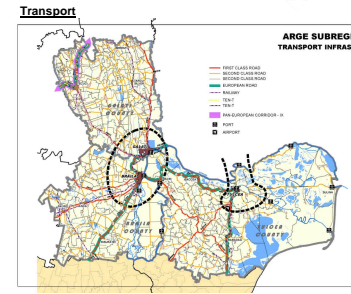
The spatial distribution of localities according to the number of population

- Galati county concentrates a big number of localities (18) having population between 2001 and 5000 inhabitants, compared with Braila and Tulcea, having only 4 localities each.
- The Eastern part of the RMU region (Tulcea County) concentrates most of localities having maximum 2000 inhabitants (16 localities).
- The East of Galati County concentrates 18 localities having between 5000 and 20000 inhabitants.

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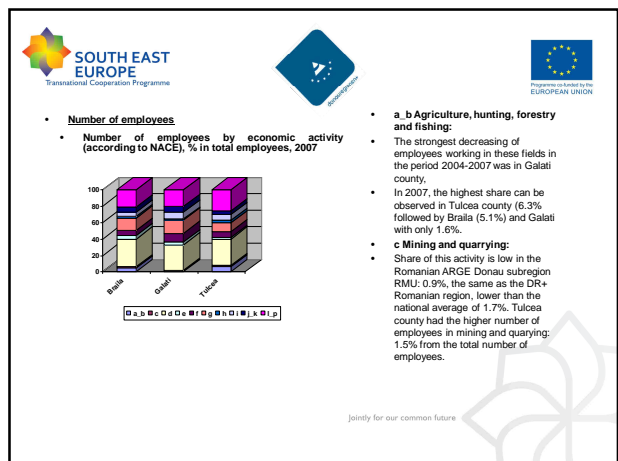
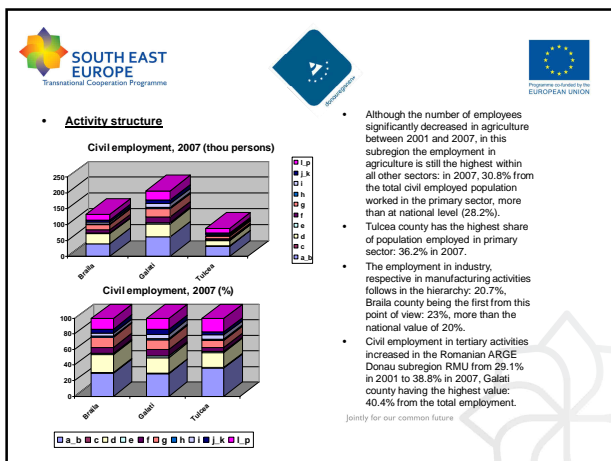
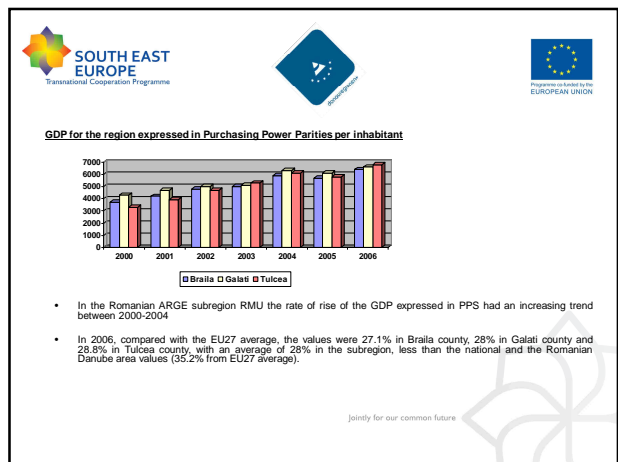
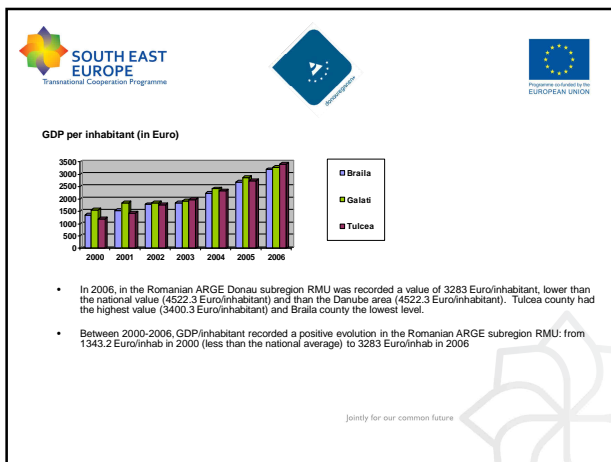
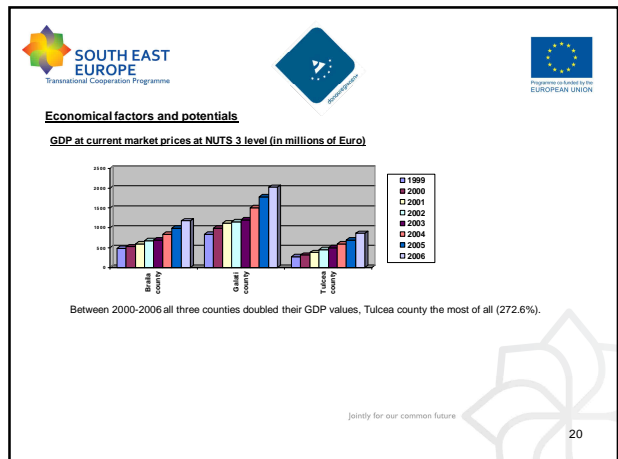
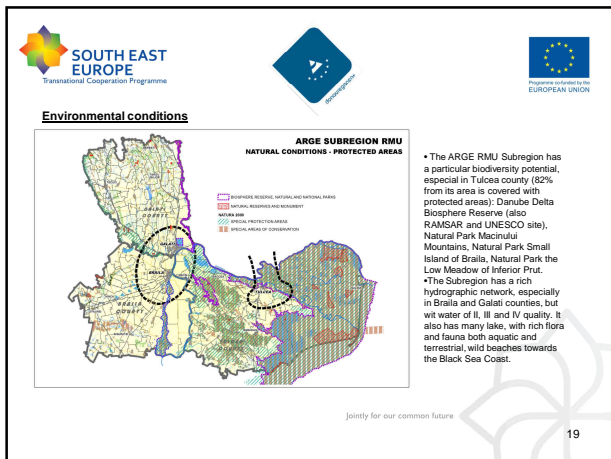
Transport





ARGE SUBREGION RMU TRANSPORT INFRASTRUCTURE

- The Romanian RMU subregion is crossed by an important transport corridor – the Danube river, having as final point Sulina town in Tulcea county.
- There are important national and European transport arteries (E87 and E581), the Pan-European Corridor no.IX and TEN-R Network.
- There are important fluvial and maritime ports Braila, Galati, Tulcea, Sulina, linking the Danube river with the Black Sea.
- The railways link the historical region Dobrogea to the rest of the country (the TEN-F network, Buzau-Braila-Galati).
- Tulcea Danube Delta Airport belongs to the Subregion too.
- In the area there are railroad and road crossing border points towards and Moldova.

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d Manufacturing:

- Between 2001-2007, only in Galati county the share of employees in manufacturing activity decreased. In Braila and Tulcea counties the number increased in 2004 compared with 2001 and decreased in 2007. The national tendency was a decline in all these years.
- The strongest decreasing in this period in the Romanian RMU subregion was in Galati county (25%).
- The average value of the Romanian ARGE Donau subregion RMU was of 32%, higher than the national average (28.7%) and the Romanian DR+ average (22%).

e Electricity, gas and water supply:

- In the Romanian ARGE Donau subregion the number of employees in this activity decreased with almost 10%.
- The highest level was in Braila county (4.1%) and the lowest in Tulcea county (1.9%).

f Construction:



- Share of employees working in this activity had an increasing tendency. Only in Tulcea county the share was inferior in 2007 compared with 2001. Average share in the Romanian RMU subregion was 8% in 2001, and 8.6% in 2007. These values are superior to those of national level (6.7% and 5.3%).
- The highest share was observed in Galati county both in 2001 and in 2007 (9.4% and 10.6%).

g Wholesale and retail trade; repair of motor vehicles, motorcycles and personal and household goods:

- The number of employees working in this sector increased in the subregion with 27% in 2007 compared with 2001.
- Per total subregion the share of employees working in this sector from total employees increased from 11.1% in 2001 to 14.8% in 2007, less than in the Romanian Danube area (13.7% in 2001 and 17.5% in 2007). The highest share in 2001 was in Braila county (12.2%), but in 2007 it was in Galati county (16.1%), where the number of employees in this sector increased with 40% between 2001 and 2007.

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h Hotels and restaurants:

- In the Romanian ARGE Donau subregion RMU the number of employees working in this sector increased with 85% between 2001 and 2007.
- In all 3 counties belonging to the subregion the activity in hotels and restaurants had an increasing trend between 2001 and 2007. In 2007, Tulcea county had the highest share of employees working in hotels and restaurants sector: 2.8%, having important tourist attractions.

i Transport, storage and communication:

- In the Romanian ARGE Donau subregion, the number of employees working in this field decreased with 20% in 2007 compared with 2001. The share of employed in this activity had a decreasing course.
- The highest share in 2007 was observed in Galati county (7.1%) and Tulcea county (5.1%) due to the transport and storage activities from the Galati and Tulcea ports.

j, k Financial intermediation; real estate, renting and business activities:



- The Number of employed in this activity increased in the period 2001-2007 with 13.2% in ARGE Donau subregion RMU.
- The average share of employed in these fields increased from 6.3% in 2001 to 7.5% in 2007 in the subregion, lower values than those at the Romanian Danube region (8.3% in 2001 to 12.7% in 2007) but higher than the national values (5.4% and 8.6%).
- The highest share in 2007 was observed in the Galati county (8.3%).

l, p Public administration and defence, compulsory social security; education; health and social work; other community, social and personal service activities; private households with employed persons:

- The number of employees in this group of activities increased with 6.8% in the Romanian RMU subregion.
- The share of the number of employees in total employees was of 21.6%, close to the regional DR+ value (20.7%) and the national one (22%).

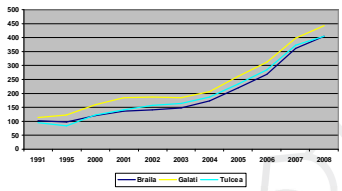
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Average monthly salary (gross)

- In the Romanian ARGE Donau subregion RMU the average monthly gross salary increased 4.7 times in 2008 compared with 2005.
- In this subregion the highest average monthly salary is in Galati county, followed by Tulcea and Braila counties.



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