Gulcin Bilgin Turna, Bratislav Dordevic, Francesco Frangialli, Dionyssis Gangas,
Rania Georgiadou, Willis Hughes, Vicky Katsoni, Gabriela Korcheva, Zeta Korda,
Georgia Miloni, Savina Nedyalkova-Rupelieva, Dimitrios Rapidis

“Perspectives on Tourism in the Black Sea Area”
The International Centre for Black Sea Studies (ICBSS) was founded in 1998 as a not-for-profit organisation under Greek law. It has since fulfilled a dual function: on the one hand, it is an independent research and training institution focusing on the Black Sea region. On the other hand, it is a related body of the Organisation of the Black Sea Economic Cooperation (BSEC) and in this capacity serves as its acknowledged think-tank. Thus the ICBSS is a uniquely positioned independent expert on the Black Sea area and its regional cooperation dynamics. Moving towards a "Green Black Sea" is our new perspective, one characterised by a focus on development, culture, as well as economic and social prosperity, one that goes beyond the traditional approach and makes the concept of Sustainable Economic Development, Energy, Regional Governance and Stability our driving force. Thus, the environmental dimension runs through all of our actions and aims.

The ICBSS launched the Xenophon Paper series in July 2006 with the aim to contribute a space for policy analysis and debate on topical issues concerning the Black Sea region. As part of the ICBSS’ independent activities, the Xenophon Papers are prepared either by members of its own research staff or by externally commissioned experts. While all contributions are peer-reviewed in order to assure consistent high quality, the views expressed therein exclusively represent the authors. The Xenophon Papers are available for download in electronic version from the ICBSS’ webpage under www.icbss.org.

In its effort to stimulate open and engaged debate, the ICBSS also welcomes enquiries and contributions from its readers under icbss@icbss.org.
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“Perspectives on Tourism in the Black Sea Area”

February 2015
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Greece, February 2015

ISSN 1790-8396

ISBN
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Preface

The International Centre for Black Sea Studies (ICBSS) being punctual and committed to its duty to deliver scientific approaches and practical outcomes for an ever more understanding and more efficient cooperation among the countries and the people of the Black Sea, returns every year with a new approach of cooperation in our area.

The ICBSS was founded in 1998 as a related body of the Organization of the Black Sea Economic Cooperation (BSEC), with the obligation to serve as its acknowledged think-tank, which will provide the organization with the appropriate data and policy recommendation for decision and implementation.

Moreover ICBSS, throughout its sixteen year operation, continuous to fulfil its second function as an independent research and training institution focusing on the wider Black Sea region.

The last years, ICBSS is focusing its endeavours to introduce all three aspects of sustainable development on different issues of regional importance. Through its activities, the Centre promotes the horizontal character of sustainable development into the Black Sea society and propels the creation of a dynamic hub between BSEC, member states, and other stakeholders, like private companies, ngo’s and academic entities with multiplying effects in the wider Black Sea region.

In this context, and keeping in mind the fulfilment of its goals, the ICBSS, parallel with other activities and initiatives that undertakes, organizes every year the International Black Sea Symposium, an interactive learning environment for young professionals, who are having the opportunity to get knowledge and experience on topics that are of great concern in the region.

In its seventh year, the Symposium builds on the success and positive impact of its previous six editions to bring together the next generation of stakeholders with an interest in the Black Sea area, focusing on tourism, a cross-cutting sector of economy of the wider Black Sea region.

The tourism industry is considered of great importance in world economy. The Black Sea countries possess remarkable cultural and ethnic diversity, rich historical and architectural heritage and diverse natural resources, aspects which are blended over the millennia to shape unique communities, languages, religions and trades, namely a distinctive and attractive match to travelers.

Keeping in mind the importance of the matter and respecting the ambition of BSEC to encourage and strengthen the cooperation between the Black Countries in the field of Tourism, ICBSS would like to engage in the whole attempt the young professionals who show willingness to contribute and to be sincere, the responding was great.

In this framework, the Symposium will attempt to delineate the cultural linkages that merge our region, to that we will have the contribution of a documentary film that has as a subject the medieval port of the Black Sea, the presentation about the Olympic Education and the ideals of olympism and athleticism as an one more aspect in promoting the inter-cultural character.
In my capacity as Director General of the ICBSS, I would like to express my heartfelt thanks to all speakers and participants, who trusted the ICBSS and without the invaluable help of whom the said publication could not come true. In particular, I would like to thank most sincerely Mr. Chris Deliso, Director of Balkananalysis.com, for the excellent coordination of the workshops at the third day of the Symposium.

The present publication is an outcome of a successful symposium in which were analyzed very interesting views. I hope you enjoy it!

Dr. Zefi Dimadama, ICBSS Director General

Athens, February 2015
Chapter 1

Tourism in the Eastern Black Sea area of Turkey: Unique and Mystic Nature

Gülçin Bilgin Turna (Turkey), Assistant Professor, Recep Tayyip Erdoğan University

Introduction

Turkey is a very well known country in the area of international tourism. When mentioned, people remember “sea, sand, sun” combination because Turkey has popular seaside resorts along its Aegean and Mediterranean coasts. In the last decade, Turkey has also become a popular destination for culture, spa and health care tourism. In 2013, Turkey has attracted 37, 8 million foreign tourists ranking as the 6th most popular tourist destination in the world (UNWTO, 2014: 6).

All countries in Black Sea Region, with its diverse and unique landscape, cultural wealth, historic heritage and wide variety of opportunities for leisure, stands among world’s most beautiful tourist destinations, attract millions of tourists from around the world (www.icbss.org). Turkey is one of the countries in the region attracting most of the foreign tourists among Black Sea Economic Corporation Countries (BSEC) thanks to its Aegean and Mediterranean Regions.

In this paper, Eastern Black Sea Area of Turkey is analyzed focusing on its potential and tourism values after mentioning the world tourism numbers and tourism in Turkey.

Overview of world tourism numbers and where Turkey stands

An ever increasing number of destinations worldwide have opened up to, and invested in tourism, turning tourism into a key driver of socio-economic progress through export revenues, the creation of jobs and enterprises, and infrastructure development. Over the past six decades, tourism has experienced continued expansion and diversification, becoming one of the largest and fastest-growing economic sectors in the world. Despite occasional shocks, international tourist arrivals have shown virtually uninterrupted growth – from 25 million in 1950 to 278 million in 1980, 528 million in 1995, and 1087 million in 2013. International tourism receipts reached US$ 1159 billion worldwide in 2013, up from US$ 1078 billion in 2012 (UNWTO, 2014: 2-3).

As it can be concluded from Table 1, Turkey remains 6th in arrivals and 12th in receipts as the previous year. Being close to Europe and offering various types of tourism, Turkey has been a very popular tourism destination for two decades. This success is obtained by either Aegean or Mediterranean Region of Turkey. Foreign tourists flock into Turkey for its warm climate (especially for sea, sand, sun combination) and hospitable people. Black Sea Region of Turkey on the other hand offers a lot different type of tourism with its mountains which are usually cloudy receiving immense amounts of rain and are very attractive with rich flora and fauna, forests, crater lakes, waterfalls, rivers, streams, mountain and nature walk, rafting, canoe and winter sports, hunting and fishing, healing water and local dishes (Wikipedia, 2014).
### Table 1: 2013 World Tourism Numbers

<table>
<thead>
<tr>
<th>Rank</th>
<th>Arrivals</th>
<th>Million people</th>
<th>Receipts</th>
<th>Billion dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>France</td>
<td>84,7</td>
<td>The USA</td>
<td>139,6</td>
</tr>
<tr>
<td>2</td>
<td>The USA</td>
<td>69,8</td>
<td>Spain</td>
<td>60,4</td>
</tr>
<tr>
<td>3</td>
<td>Spain</td>
<td>60,7</td>
<td>France</td>
<td>56,1</td>
</tr>
<tr>
<td>4</td>
<td>China</td>
<td>55,7</td>
<td>China</td>
<td>51,7</td>
</tr>
<tr>
<td>5</td>
<td>Italy</td>
<td>47,7</td>
<td>Macao (China)</td>
<td>51,6</td>
</tr>
<tr>
<td>6</td>
<td>Turkey</td>
<td>37,8</td>
<td>Italy</td>
<td>43,9</td>
</tr>
<tr>
<td>7</td>
<td>Germany</td>
<td>31,6</td>
<td>Thailand</td>
<td>42,1</td>
</tr>
<tr>
<td>8</td>
<td>The UK</td>
<td>31,2</td>
<td>Germany</td>
<td>41,2</td>
</tr>
<tr>
<td>9</td>
<td>Russia</td>
<td>28,4</td>
<td>The UK</td>
<td>40,6</td>
</tr>
<tr>
<td>10</td>
<td>Thailand</td>
<td>26,6</td>
<td>Hong Kong (China)</td>
<td>38,9</td>
</tr>
</tbody>
</table>

Source: UNWTO, 2014: 6

### Figure 1: BSEC Member Countries – 2012 International Tourist Arrivals and Receipts

**Black Sea Region 2012**

Source: Roncak, 2013: 8
Figure 2 shows 2012 international tourist arrivals and receipts of BSEC member countries. Being 6th attractive tourism destination in the world, Turkey holds 31% of the foreign tourist arrivals and 39% of receipts among BSEC member countries.

This success of Turkey comes from the variety of offerings to foreign tourists. Tourism is one of the largest and fastest growing sectors of Turkey and the development of international tourism has been very successful. Over the last two decades Turkey has made considerable investments on infra and super structure. This also includes transport infrastructure such as improvement, modernization of airports and air terminals as well as construction of new ones. In addition to the international airports in the main cities and resort destinations, Turkey has domestic flights to all major cities and tourist centers. The transport infrastructure and the efficiency of services as well as advanced communication network system meet all the requirements of contemporary tourism. The accommodation industry at present includes a range of facilities from the top quality, super modern deluxe category hotels and holiday complexes, boutique hotels to the affordable ones. Although city hotels, summer resort hotels and holiday complexes constitute the greater part of the accommodation industry, there are numerous ski, winter resort and spa and convention hotels in various parts of the country. Most high standard hotels and holiday complexes have a variety of recreation, entertainment facilities. There are also a number of golf courses of international standard in various parts of the country (TURSAB, 2014).

By 2023, Turkey aims to have 50 million foreign visitors and $50 billion tourism receipts and be in the first 5 in the world in terms of number of foreign tourists and tourism revenue. Increasing the share of high-income group visitors; increasing per capita tourist expenditure and length of stay; expanding demand for tourism to 12 months by decreasing seasonality; increasing demand for kinds of tourism such as culture, golf, winter, congress, health, yachting, city, youth, shopping, ecological tourism; ensuring a balanced distribution of tourism to Turkey’s different regions (TR Ministry of Culture and Tourism, 2012: 52) are some of the marketing objectives of Turkey. Aegean and Mediterranean Region already have been attracting many foreign tourists’ attention. Black Sea Region of Turkey also has a great potential for both domestic and international tourism especially in ecological tourism.

**Tourism in Eastern Black Sea Region of Turkey**

The Black Sea coast of Turkey is famous with its green forests, traditional wooden houses and extraordinary plateaus. The region is very mountainous and is heavily forested, while the highest parts of the mountains are covered with alpine meadows, glacier lakes and glaciers. The Black Sea Coast is never crowded because cloud is more common than sun but that is fine with the adventurous types who come here for a few days to savor its deep history, its dramatic beauty and its special cuisine. A trip through the landscape includes peaceful seashore, exciting fishing villages and fields of tea, hazelnuts, corn and kiwi (goturkeytourism.com).

Rize is one of the cities in Black Sea Region of Turkey. The city is built around a small bay on the Black Sea coast, on a narrow strip of the flat between the sea and the mountains behind. The coastal strip is being expanded with landfill and the city is growing up the steep hillsides away from the coast. Rize enjoys a mild, extremely wet climate, vulnerable to storms coming off the Black Sea and therefore the surrounding countryside is rich with vegetation and is attracting more and more visitors every year (Wikipedia, 2014). Hiking, culture, nature, sports
(rafting, climbing, heli-skiing), thermal tourism are the city’s top tourism assets. Foreign tourists who visit the area are astonished by the natural beauty of the area and surprised that Turkey is not just a “sea, sand, sun” country. Adventurous people who like adrenaline sports like heli-skiing (helicopter skiing) or people who like quiet and peaceful mountains and natural flora enjoy the area very much.

Heliskiing is off-trail, downhill skiing or snowboarding accessed by a helicopter as opposed to a ski lift. It is about skiing in a natural and selected environment. Kackar Mountains in Rize are serving for very rich adventurous skiers especially from Europe. Since its birth over seven years ago, Turkey Heliski has grown to become a large extended family made up of a solid team of international guides, pilots and numerous mountain lovers (heliski.pro).

10 suggested strategies for the development of tourism in Eastern Black Sea Region of Turkey

1. *Increasing bed capacity is crucial:* Plans should be make to construct hotels in order to increase the bed capacity to cope with anticipated increase of the number of tourists in the area.

2. *Successful tourism stories should be inspired:* There are tourism success stories all around the world. In Turkey, there are many cities (Antalya, Istanbul, etc.) which attract high number of foreign tourists with the help of successful strategies. These strategies should be consulted.

3. *Stories of the tourists are important:* Foreign tourists often tend to be impressed by the experiences Turkey has on offer. Through word-of-mouth they recommend Turkey to their acquaintances spreading the country’s positive image.

4. *Quality, customer services, guidance and security should be provided:* Foreign tourists who are temporary residents of another country need to feel safe. They need guidance starting from the beginning of their journey to the end (how to get to the hotel, what to visit around, etc.). In order to keep tourists happy and help them recommend the area to others, high quality customer services are required starting from the personnel. Not only is the quality of the personnel of the hotel important but also the hospitality of all the people in the area.

5. *Local products and services having a touristic value should be improved:* In eastern part of Black Sea Region of Turkey, there are many local products such as honey, kiwi, corn flour, butter and hazelnut. Marketing these products should be done in a meaningful way in order to create a touristic value.

6. *Overcoming the language barrier is important:* In big cities of Turkey, local people are able to speak English, however in Eastern Black Sea, local people cannot speak English and that causes a big barrier and sometimes foreign tourists are very confused and do not understand what to do. To be able to speak English is very important in order to attract foreign tourists and serve them the best quality.

7. *Standardization of intercity transportation is needed:* Not only airport transfer, but all the public transport system should meet the requirements of the foreign tourists.

8. *Cruise ship tourism should be supported since it does not require bed capacity:* Cruise ship tourism has experienced strong international growth developing new market niches. It has a special importance in Black Sea.
9. Both locals and tourists should benefit from the touristic activity: Locals and tourists should respect each other. Local people who are not used to foreign tourists may not understand how to behave at first, but then mutual understanding and respecting each others’ boundaries help the area grow in terms of tourism. Both locals and foreign tourists should be happy about any kind of touristic activity.

10. Cooperation among the countries, regions and cities is important: Sustainable development of tourism within the BSEC member countries enhance existing connections through the adoption of joint action plans for Black Sea.

Discussion

Turkey, with its enormous tourism potential and a great diversity of its natural resources, historical treasures, cultural values and activities, life style, attractions, efficient, dynamic tourist industry offers wide selection of products that can satisfy the demand of different market segments including the most sophisticated and demanding traveler. Tourists are flocking to Turkey in increasing numbers (TURSAB, 2014).

Even in a small area such as Eastern Black Sea Region of Turkey offers a variety of touristic experiences. In order to ensure a balanced distribution of tourism to Turkey’s different regions, potential in the Eastern Black Sea should be considered and the government and investors should take steps to attract foreign tourists into the area. All the strategies should be taken after considering the benefits of both sides: local people and tourists.
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Republic of Turkey, Ministry of Culture and Tourism Directorate General for Promotion, Campaign Briefing, 2012.


Chapter 2

The role of the Organization of the Black Sea Economic Cooperation (BSEC) in strengthening the cooperation among the BSEC member states in the field of tourism

*Amb. Bratislav Đorđević* (BSEC), *Executive Manager in the Permanent International Secretariat (PERMIS) of the Organization of the Black Sea Economic Cooperation (BSEC)*

I am very pleased to speak at the 7th International Black Sea Symposium “Perspectives on Tourism in the Black Sea area”, organized by the International Centre for Black Sea Studies (ICBSS), under the Hellenic Chairmanship of BSEC. Allow me to express my satisfaction at seeing at this Symposium many young professionals engaged in the field of Tourism, which is very promising as we in the Organization of the Black Sea Economic Cooperation (BSEC) are usually dealing more with governments of our Member States and less with, what is called, “other stakeholders”. The practice of organizing such meetings is very important, as we believe that, while the governments should create a favorable climate by offering various incentives, the emphasis should always be on the leading role of the private sector if we are to achieve better results in tourism. It seems that the Hellenic Chairmanship of BSEC and the Ministry of Tourism together with the ICBSS have already succeeded in the goal to further advance the cooperation among the BSEC Member States in the field of tourism by making Athens the venue of two very important gatherings in this area: first, by organizing this important Symposium and the next week, on 23 October, by convening the Meeting of Ministers in charge of Tourism of the BSEC Member States.

It is known that the wider Black Sea area possesses enormous potential for the development of tourism. This, undoubtedly, is one of the greatest assets of our region that should be utilized not only for the development of national economies of BSEC Member States and the promotion of regional cooperation, but also for shaping this area as an attractive tourism destination both for our peoples and for tourists from all over the world. Being interconnected to other economic fields, tourism can also contribute to substantial development when combined with other activities, such as culture, transport, to mention only a few.

This was the main reason why BSEC, following its inception, established a Working Group on Cooperation in Tourism which, since 1994, held regular meetings with a wide a scope of tourism issues discussed. Since 2002, four Meetings of the Ministers in charge of Tourism of the BSEC Member States were also held, and the forthcoming Ministerial Meeting will be the third one held in Athens, which testifies to the ever growing interest of the BSEC Member States in developing the cooperation in this field.
In June 2012, the Council of Ministers of Foreign Affairs of BSEC Member States adopted the “BSEC Economic Agenda Towards an Enhanced BSEC Partnership”, as a strategic document for guiding the cooperation in the BSEC framework in order to meet the goals set by the BSEC Charter and the new challenges and opportunities that the Member States will be facing in the years to come.

Goal 8 of the Economic Agenda entitled “Development of Tourism and Protection of Cultural Heritage” contains a number of priorities we are now implementing through our activities with a view to promoting the BSEC Region as one of the leading tourist destinations of the world and further strengthening the cooperation of the Member States in the field of tourism.

It is not by a coincidence that those priorities were accepted by the Ministers in charge of Tourism of the BSEC Member States who adopted the Declaration at their Meeting in Kyiv, on 10 October 2013.

In the Declaration, the Member States expressed the readiness to invest their best efforts for the enhancement of the regional dimension of the cooperation among the BSEC Member States, *inter alia*, by:

“a) further strengthening the cooperation of the BSEC Member States in the field of tourism, including enhancing dialogue on facilitation of visa procedures;
b) elaborating a regional tourism management programme that prioritizes the efficient use of the resources of the BSEC Region, ensuring sustainable tourism development by adopting green growth strategies that will enable economic expansion while preserving natural and cultural heritage;
c) increasing the market share of the BSEC Region within the global tourism market through the joint promotion and marketing of the existing and new tourist packages, *inter alia*, by participating in international tourism events;
d) working out the possibilities of establishing a network among the tourism professionals, travel agencies and associations of the BSEC Member States;
e) encouraging the development and implementation of joint projects and programmes in the field of maritime, winter, sports, health, spa, wellness and business tourism, as well as mutual investments and incentives in order to promote the BSEC Region as an attractive tourism destination;
f) promoting cultural tourism/cultural routes projects in the Black Sea Region and their implementation;
g) organizing tourism training programmes in order to improve the quality of tourism services;
h) creating a web portal of internship possibilities in the BSEC Member States for students and graduates interested to pursue their careers in the hospitality industry;
i) exchanging statistical information and publishing an annual report for tourism activities of the BSEC Member States.”

They stressed the need of further enhancing close cooperation with the World Tourism Organization (UNWTO) and other international organizations or entities related to tourism, in
order to benefit from their experience and know-how and in order to promote tourism in the Black Sea Region worldwide. As a result, BSEC has already granted to the UNWTO the status of a Sectoral Dialogue Partner and we are about to sign the Memorandum of Understanding on cooperation between UNWTO and BSEC.

The Ministers instructed the BSEC Working Group on Tourism to undertake practical steps for the effective implementation of the provisions of the Declaration and the relevant Goal of the BSEC Economic Agenda and to increase the cooperation with the BSEC Working Group on Culture with regard to the implementation of the cultural tourism/cultural routes projects.

And last, but not the least, the Working Group on Tourism was requested to study the possibility to start a Project on Development of Cruise Tourism in the BSEC Region with the valuable contribution of the BSEC Working Group on Transport and other competent BSEC bodies.

With the Hellenic Chairmanship of BSEC, one of the main goals of the forthcoming Ministerial Meeting will be to further enhance the regional dimension of the cooperation in the field of tourism, inter alia, by developing film-induced tourism and gastronomic and wine tourism in a sustainable way, as high-value forms of Special Interest Tourism, along with other forms of tourism, such as agritourism, rural tourism, wellness and spa tourism, exploring the possibility of establishing a network among regional or national, public or private organizations, professional associations and educational institutions from the BSEC Member States, which are involved in actively promoting gastronomic and wine tourism in their regions/countries, in order to allow the exchange of know-how and best practices and encouraging partnerships in these areas.

As it can be seen, BSEC has been very active in the implementation of the goals set by various high level documents, with a view to encouraging and strengthening the cooperation in the field of tourism, through existing or new projects.

The BSEC has been active also in other relevant areas, for instance, by establishing a strong link between tourism and culture. Cultural tourism / cultural routes projects can be very good example of cooperation among the countries of the Region. Cultural heritage, protection of cultural monuments and archaeological sites, including cooperation to combat illicit trafficking of stolen cultural property, are very much in the focus of our attention.

We believe that with the engagement of interested institutions and organizations of both public and private sector, the envisaged projects may be implemented. It is up to the governments and ministries of tourism of the BSEC Member States to study those projects and provide assistance and funding, for they may, if realized, bring new dimensions in cooperation to this region. While the governments should create a favourable climate by offering various incentives (tax exemptions, long term credits etc.), emphasis should always be on the leading role of the private sector if we are to achieve better results in tourism.

On this occasion, I wish to mention two infrastructural projects of major significance for the countries in the Black Sea area, as well as the Eurasian region. These are the Black Sea Ring Highway project and the project on the development of the Motorways of the Sea in the BSEC region. The Black Sea Ring Highway project envisages a four-lane ring highway system,
approximately 7100 km long, to connect the BSEC Member States with each other and the European road network to that of Asia. The project on the development of the Motorways of the Sea in the BSEC region, on the other hand, is about strengthening the maritime links among the ports of the BSEC Member States. We believe that the Project on “Development of Cruise Tourism in the BSEC Region” will perfectly fit with the above mentioned two major transport projects.

All those projects are expected to contribute to the growth of trade among the countries of the region. They will also foster tourism, infrastructure and investments in the Black Sea countries, contributing to economic prosperity. Most importantly, they will make a concrete difference in the lives of the people of the region and bring them closer together.

Cooperation of the BSEC Member States in the fields of tourism, culture, transport infrastructure and in the implementation of concrete projects, all contribute to providing better opportunities for the region, increasing exchange of goods and services, and tourists, thus contributing to boosting the economies of the States in the region.
Chapter 3

Tourism in the Black Sea area

Francesco Frangialli, Honorary Secretary General at the UN World Tourism Organization, Keynote speaker at the Symposium

It is an honour for me, thanks to my friend Ambassador Jean Cadet, to take part for the first time in a meeting of the ICBSS.

I am pleased that the ICBSS and the Organization of the Black Sea Economic Cooperation are paying an increased attention to tourism – a sector that represents some 5% of the World GDP and 25% of international trade of services.

This Symposium is organized just one week before the conference of Ministers of Tourism of the BSEC in which, my successor as Secretary-General of the World Tourism Organization, Dr. Taleb Rifai, will participate for the first time. I am pleased to note that a Memorandum of Understanding will be signed on this occasion between BSEC and UNWTO.

My presentation will be focused on two aspects:

First: to describe what are the major patterns of international tourism in the Black Sea area.

Second: To propose some suggestions, some guidelines, for your countries and their tourism industry to follow, in order to increase the benefits that you can draw from this activity and its growth.

In countries like Greece, facing economic difficulties, tourism contributes to recovery. Receipts generated by international tourism amounted to 16 billion USD in Greece in 2013, a growth of 16.4% over 2012. They increased by 13.4 %, during the first half of 2014.

Let me, first of all, have a look at some patterns of tourism in the BSEC area. The wider Black Sea region, along with Eastern Mediterranean is an important tourism area. The 12 countries members of BSEC have received in 2013, 127 million international arrivals. Let me recall that an international arrival refers to someone who is travelling abroad and leaving for at least 24 hours his or her normal environment – that is to say spending at least an overnight in another country. And this, whatever the purpose of the trip: leisure, business, religion and pilgrimage, health, visiting friends or relatives.

Tourism is not only about leisure and holiday. It is much more than that! Being with you today I am a tourist! Let’s take an example. A country like Ukraine, has received in 2013, 25 million visitors, and is ranking third among BSEC countries after Turkey (38 million) and Russia (28 million), but before Greece (18 million). These impressive figures for Ukraine and Russia reflect, for a significant part, the important movements of persons crossing the borders of the two countries because of the close links – family, economy, cultural – between their populations and the populations of other neighboring regions. Let’s hope that peace will return soon in this part of Europe in order that these fruitful exchanges can resume.

Tourists bring more to economies and societies than refugees and formal migrants. On the opposite hand, for a country like Greece, most of the tourism frequentation is related to holidays and leisure, a small part being for business.
In countries like Turkey and Armenia – and they are not the only examples – a part of the tourism frequentation corresponds to what is sometimes called “ethnic tourism”, a phenomenon which is related to the one of international migrations – people from Turkish origin – a part of them nationals from Germany - come back on a regular basis for vacations to Turkey, as well as members of the Armenian diaspora – living in Western Europe and Northern America – are coming back to visit friends and relatives in their country of origin.

To a lesser extent, this phenomenon exists also for Bulgaria and Romania, two countries equally important for beach tourism and cultural tourism, as Albania will also be in the near future. All these indications mean that international tourism is not at all uniform in the BSEC area and we have to keep in mind this consideration.

Let me make another comment on these figures. 127 million of international arrivals in the BSEC area mean a market share of 22.5% in Europe, since 564 million international arrivals have been registered in European destinations in 2013. But with 74 billion of USD receipts, compared to 489 billion for the whole European region, BSEC countries account for only 15 per cent of the total. This feature is even more accentuated if we look at the percentages of the BSEC area in world tourism.

The 12 BSEC countries represent 12% of international arrivals as a whole (1087 billion in 2013) and a mere 6% of world tourism receipts. These indications are not positive. It means that in BSEC countries the expenditure per trip and per capita are low, much under the European and the world averages.

The fact that 2 major countries – Turkey and Greece – are mass tourism destinations for visitors from Northern and Western Europe is clearly part of the explanation. Another factor, I have already mentioned about Turkey, relates to travel generated, in a second step, by the international migrants returning home, for many of them with a limited purchasing power.

A major priority for BSEC should therefore be to put in place in partnership, a strategy in order to increase the average daily expenditure of their visitors and to extend the duration of their stay.

Lastly, I would like to recall that BSEC destinations, as well as European destinations as a whole, rely mainly on intraregional flows and not so much on long-haul travels. In other terms 80% of international arrivals in Europe correspond to visitors coming from another European country.

Yet, visitors from North America or Eastern Asia are flouring in great numbers to cities like Athens or Istanbul, and other touristic spots in the region. But these are exceptions. Generally speaking, for the BSEC area, visitors are in high proportions coming from Northern and Western Europe, and also from Russia.

The conclusion is clear: diversifying the frequentation, attracting visitors from emerging long distance markets of North East Asia and the Gulf area should be another priority for the BSEC countries. From recent estimates released by the National Tourism Administration of China, 135 million Chinese have travelled out of the country in 2013. The head of CNTA believes that this figure will increase five times in the coming years. This prediction may be a little bit optimistic, but, in any case, the potential market is there.

How to get a significant market share among these new population of travelers should be, from my point of view, an important concern to be discussed during this Symposium, and also, in a few days, in the Council of Tourism Ministers of the BSEC.
Let me now present three remarks, or suggestions – one somehow negative, the two others are positive – on the way to increase the benefits you can reap from this important tourism frequentation.

“Black Sea” is not an appropriate name, at least for the moment, for positioning and promoting your sub-region. For three reasons:

a. people ignore geography, and would be unable to locate the Black sea area on a map.
b. the wider Black Sea region is of course much broader than the coastal areas of the Black Sea itself. Therefore the name would be misleading.
c. political tensions prevailing in the region, from Georgia to Moldova, including Ukraine and Russia, do not make it relevant. For the time being, let’s focus about building a brand, a logo or a slogan that would refer to the Black Sea.

The Black Sea area is an adequate frame for defining an advanced model of tourism development based on sustainability – a model linking ecological preservation, environmental protection and cultural enhancement of monuments.

The Black Sea area may be the part of the world where you can find within short distances a maximum of sites –many of them included in the World heritage List of the UNESCO that would gather both environmental and cultural assets. One of the most prestigious – the Acropolis – is just in front of this hotel.

For many centuries, men have selected for their settlements the most exceptional places. From there, civilizations expanded to the neighboring regions.

Out of the 1007 sites included in the World Heritage List, 94 –almost 10 per cent of the total – are located in a BSEC country. Many of these sites, which attract great numbers of visitors, have one thing in common: the presence of the sea. Many others are located in mountain areas. For these reasons, these sites are fragile. Several of them already suffer from the pollution of the sea. Many will be facing tomorrow the consequences of the global warming. Because they are already successful attractions, many of them, too, bear the consequences of an excess of frequentation, where the number of visitors they receive is higher than their carrying capacity.

Building up adequate indicators of sustainability for the destinations and sites of Eastern Mediterranean and the Black Sea –using the methodology already developed by the UNWTO and the Center of Excellence for Destinations of Montreal, in Canada, - could be an interesting way of designing a new and original model that would represent a fantastic asset in the international competition among destinations. Such indicators of sustainability could be useful instruments in the hands of the national and local tourism authorities. They can be useful tools for the tourism operators as well.

Finally, let me say that a second avenue for increasing tourism benefits for your countries is to be found in bilateral and regional cooperation. In terms of tourism development, two of the 12 members of the Black Sea Economic cooperation Organization –namely Greece and Turkey –are clearly in advance compared to other countries, which are catching up to achieve the same results. In spite of their conflictive history these two countries have been engaged for many years in an active cooperation in the field of tourism.

Following previous agreement, a bilateral protocol of cooperation was signed in November 2006 between their tourism ministers. In 2010, the two countries set up a high level cooperation Council which competences include tourism, sport, cultural and maritime
transport. This spirit of cooperation was re-affirmed during the visit paid by the Prime Minister of Greece to Istanbul in May 2013.

Tourism is a non-confictive activity, which suffers from lack of security, tension and crisis but, which encourages and facilitates cooperation among countries with opposite interests or ancient antagonisms. The example given by Greece and Turkey paves the way for other cooperation to be developed on a bilateral way or within small groups.

Can you go further? Is it possible to build up this kind of sub-regional cooperation at the scale of the 12 countries members of the BSEC? I suppose that this issue will be discussed by the tourism ministers of BSEC in their upcoming meeting.

This is a challenging prospect, but that may be not so easy to achieve. If you look around the world, you will find many examples of initiatives of that kind which have failed, or are at a standstill. But some of them are working well, generally because the sub-regional institutions that have been put in place gather partners from both public and private sectors. The two most successful examples from my point of view are the CTO (Caribbean Tourism Organization) in the Americas, and PATA (the Pacific Asia Travel Association) in the Asian and Pacific region.

Maybe should the ICBSS and the BSEC look at these examples before considering such a strategy?

Let me express the wish that his Symposium will contribute to reinforce the already existing links of cooperation and partnership between the stakeholders involved in the balanced and sustainable development of tourism in this extraordinary part of the world!
Chapter 4

The inter-cultural character of Olympic Education and its unifying role in the contemporary society

Dionyssis Gangas (Greece), Director of IOA (International Olympic Academy)

I would like to thank the ICBSS wholeheartedly for the invitation addressed to the International Olympic Academy in order to participate in the 7th Black Sea Symposium, which aims at the quest for joint cultural paths which could enhance the mutual tourist development for the benefit of the countries bordering the Black and the Caspian Sea as well as the neighboring Balkan countries.

Many of you might wonder how Olympism relates to this particular quest. Indeed, there are many common elements that culturally connect these countries. And I am not referring to the sheer cultural similarities that are studied by specialists. I am referring to a common element that each and every society worldwide has developed in an organized way during more than the last 100 years. This common element is sport and the culture that surrounds it.

Juan Antonio Samaranch, who had a remarkable impact on the Olympic Movement, used to say: “Olympism is the marriage of sport and culture”.

The fact that the entire philosophy of Olympism is based on three pillars: Sport, Culture and Education, is not incidental. It is something that the visionaries of the modern Olympic Movement, Pierre de Coubertin, always emphasized in order to support his ideology. The Olympic Charter and the International Olympic Committee say: “Olympism is a philosophy which, by blending sport with culture, seeks to create a way of life based on the joy found in effort, the educational value of good example and respect for universal ethical principles”. It is now generally admitted that the Principles and Values of Olympism aim at the creation of a set of behaviors and actions that contribute to the enhancement of the personality of the people who form the modern society.

Olympism is a social philosophy that focuses on the function of sport in bringing about universal values to the global community. Liberal ideals must dominate if differing cultures are to live in mutual respect. And finally Sport can educate and develop common values in all cultures.

This philosophy has as its focus of interest not just the elite athlete but everyone. Not just a short truce period, but also the whole of life. Not just competition and winning but also the values of participation and cooperation. Not just sport as an activity, but also as a formative and development influence contributing to desirable improvement of individual personality
and social life. Coubertin, being product of late 19th century liberalm, emphasized the values of equality, fairness, justice and respect for persons, rationality, and understanding, autonomy and excellence. These are values, which exist since the Antiquity, although some of them may be differently interpreted at different times.

Every civilization, regardless of where and when it was developed, includes necessarily most of the above-mentioned values, and this is what made Olympism worldwide accepted and a common denominator of a desired perfect society.

It is widely known that Coubertin wished to convey the Olympic idea to the contemporary world, as a means of education. He, therefore, restored the Olympic Games, for he recognized the fact that, through the Games, he would be able to attract the interest of both public opinion and governments, so that the Olympic principles and ideals would eventually be applied to the general education of the young. According to Coubertin, Olympism has a philosophical and educational dimension.

He conceived the idea of reviving the ancient Olympic Games, within a framework of global revival, with sport acting as an instrument for the physical, ethical and cultural education of generations of youth.

The Olympic Movement has been developed since that time based mainly, as previously explained, on three pillars, by definition equal and inter-dependent: the sporting pillar, expressed inevitably through the Olympic Games, the cultural pillar expressed through the universality of Olympism as social philosophy and the educational pillar, expressed firmly through the dissemination of the values and principles of Olympism. And this last pillar was left in the hands of the International Olympic Academy and the 147 National Olympic Academies around the world to accomplish.

The International Olympic Academy, this multicultural and educational Center, has taken over, since 1961, the task of preserving, studying and disseminating the values of Olympism. The Academy was founded precisely for the purpose of safeguarding the value system of Olympism. It welcomes in its facilities in Ancient Olympia people from all over the world to whom it teaches the principles of Olympism through detailed lectures and harmonious cohabitation, right next to the archaeological site of Olympia, contributing in a tangible way to experiencing Olympism as a way of life and promoting peaceful coexistence of men and people all over the world.

The IOA functions as an umbrella to the National Olympic Academies around the world. The presence in each country of a National Olympic Academy, with clearly defined objectives and direct support to its work from the respective National Olympic Committee acts as a catalyst for the promotion and dissemination of the Olympic values, mostly aimed at the youth of this country. All the active NOAs, like the ones belonging in the countries around the Black Sea and the Caspian Sea as well as the Balkan countries, look like bright lighthouses that guide the youth to safe ports, far from the various threats of the modern society and closer to the authentic Olympic Values and Principles, which are necessary not only for making their own life better but also for the future of their homeland itself.
The cooperation of the IOA with the Olympic Academies of these countries has been developed greatly during these past years. The participation of their representatives in the annual IOA Sessions has created a number of cultural exchanges with excellent outcomes.

This cooperation has also developed the tourist aspect of this relationship, by giving the participants and visitors the opportunity to experience unforgettable moments in the enchanting ancient Olympia.

An example of immaculate cooperation with positive outcomes, not only on an educational level, but also in terms of cultural exchange and tourist initiatives is the relation that has been developed in the course of the last years between the IOA and the Ministry of Youth and Sport of Azerbaijan.

The partner country has asked for the contribution of the IOA in order to enhance its efforts towards the impeccable organization of the 1st European Games according to the Olympic Games standards. For this reason, the IOA has organized a series of educational seminars, in Greece as well as in Baku, with the European Youth Session that took place last August in Ancient Olympia, with the participation of representatives from more than 36 Olympic Committees, being the most eminent event.

Furthermore, within the framework of countries’ cultural and touristic approach and following an invitation from the Greek Ministry of Foreign Affairs, the IOA has joined “GRECT”, a network of academic and cultural institutions in Greece that can host international conferences, seminars, summer camps, etc. in beautiful locations all over the country, with a view to promoting educational and cultural tourism in Greece. Under the title “Educational and cultural tourism - Routes in Greece” this network tries to promote cultural exchange through the organization of international educational seminars in places of major archaeological interest and particular natural beauty, like Ancient Olympia.

Visitors from all over the world and of course from neighboring countries, with whom Greece has common cultural characteristics, are provided with the opportunity to enjoy a journey through time and history in Greece and become better acquainted with the cultural and scenic splendor of the country. Ancient Olympia, the birthplace of the Olympic Games, and IOA function as a multicultural center and a meeting point for people around the world.

It is more than certain that the ICBSS constitutes the most important institution for analyzing and documenting all those parameters that could help the enhancement of the relations between the above mentioned countries on many levels, and given today’s opportunity we would like to suggest the cooperation in the field of Olympic Education.

In 2009, the present IOA Administration decided to take a major step in the field of education establishing in cooperation with the University of the Peloponnese, the first international Master’s Degree in Olympic Studies, which currently enrolls 30 students from all over the world.

Therefore, here is an educational area where we could pursue cooperation between the ICBSS and the IOA, by promoting the participation of young graduates from the partner States in the Master’s Degree program in Olympic Studies.
Thanking you for this kind invitation and hoping to establish further relations between the International Olympic Academy and the ICBSS, I would like to take this opportunity to show you a short video, which will display the work of the IOA and activities as well as the magical atmosphere in Ancient Olympia.
Chapter 5

Sustainable tourism in the Black Sea Region

Rania Georgiadou (Greece), Senior student majoring in International & European Affairs at DEREE – American College of Greece, Vice-president of European Affairs of IBEA Society

Bulgaria

Tourism in Bulgaria is a significant contributor to the country's economy. Situated at the crossroads of the East and West, Bulgaria has been home to many civilizations - Thracians, Romans, Byzantines, Slavs, Proto-Bulgarians, and Ottomans. Bulgaria has 2 main ports: Bourgas and Varna. Bourgas is mainly the gate entry and exit of goods from the country. In this area, exists also the unique refinery of the country which processes about 12 million tones of crude oil. The last 15 years this refinery is owned by the Russian company LUKOIL. In a radius of about 100 km north and south of Burgas there are many tourist resorts with visitors from Russia, Germany, England, Israel, and mainly Turkey. In the area of Varna, that in the communism period the resorts of the officials were located, in a radius of 70 km around, there are many resorts that offer different services to the visitors, like SPA, thalassotherapy etc. The main visitors of Varna come from Russia, Romania, Germany and Greece. Bulgaria has very good infrastructure for winter tourism too, with several ski areas which offer excellent conditions for skiing, snowboarding, ski running and other winter sports and the most famous are in Borovitch, Baborovo, Bansko, and Vitosha. Furthermore, in the city of Velinograd there are many hotels with natural hot water and the city has been distinguished as capital of SPA in the Balkans.

Notably

There are tourist facilities manufactured for all income figures and it is remarkable that in the last 10 years it is a place of tourism for pensioners from England, Germany, Holland and Austria because of the low cost of living. It is a prestige and responsibility for the country to meet pensioners from Europe. Their stay in Bulgaria provides an opportunity to the tourist season to be prolonged and enables them to make significant steps towards changing the image of the country. Youth tourism is not the only valuable indicator for making the area a tourist resort. I would rather say that the older people in many times have more considerable criteria. Tourism pensioners should be promoted by the countries concerned with profitable incentives related to the money they spend for their holidays.

Romania

A visitor can see many different things in Romania. A journey of a few hours by car or train can take him from the Danube River to a beautiful, intact, medieval town in Transylvania; from Bucharest - Romania's capital city - to the Black Sea; from Southern Transylvania to Bucovina or Maramures. Tourists can also visit one of the world's famous painted monasteries in Bucovina, the ancient, hilltop citadel in Sighisoara or an authentic, centuries-old, folkloric village in Maramures. Bounded by Cape Midia and Vama Veche, the Romanian
littoral of the Black Sea, nicknamed the *Romanian Riviera*, stretches over a length of 245 km. Along the European route E87 are strung the 15 resorts that make disposal more than 250,000 accommodation places. The Black Sea coast has long been known for cures of arthritic, rheumatic, internal and nervous disorders. Eforie Nord and Mangalia spas specialize in mud baths (the mud is taken from the area’s salty lake waters) as well as in world famous *Gerovital* and *Aslavital* original rejuvenation treatments. In general, Romania is not a very active country in the seaside tourism but in the Black Sea region has a strong industrial activity too. In the Black Sea there are two refineries that operate, and the larger one that operates in the city of Constanta is owned by the state company of Kazakhstan.

**Notably**

Agritourism, as an economic activity has gained its recognition and importance in the national economy because of the social role it plays due to the natural resources potential and also to the species biodiversity that are to be found in Romanian waters. In some isolated areas, such as the Danube Delta and the Danube Plain, fishing and agritourism are the main activities that provide jobs and income sources for local populations. The agritourism potential about the regional and local development strategies must be reconsidered. Their benchmark in agriculture is to promote healthy eating, and they try to copy Tuscany’s model, in Italy.

**Ukraine – Crimea**

Ukraine following the latest developments in the region will have to wait for a long time because several problems have occurred and as a result development in the tourism region is a distant dream for the moment. Remarkable, that in Crimea, which was the most touristic place in Ukraine, based on the new data that have taken place, the opportunities that will be created will be mostly be exploited from the Russians.

**Notably**

Amazing but real! Ukrainian tour operators offer a new type of war-time tourism, which seems to be the only sustainable for the moment. Tourists in Ukraine are being offered trips to the war zone with low prices for a tour. The tours can be to the battle zone in the east of the country where hundreds of people have been killed range from the cheapest option to the more expensive outings to areas where there is active fighting. Opportunist companies have sprung up in war-torn areas, posting publicity for the bad-taste tours on trees and posts. It is unbelievable that several people that have been on the tours and posted images on social networking sites also talked about picking up souvenirs, including bullet cases and pieces of blackened rubble to take home as a keepsake. Of course, I brand the tours as sick and weird, saying that the war was a tragedy and not something to be made light of as a tourism trip!

**Russia**

Tourism in Russia has seen rapid growth since the late Soviet times, first inner tourism and then international tourism as well. Rich cultural heritage and great natural variety place Russia among the most popular tourist destinations in the world.

The region of the country bordering the black sea was place of growth for many residents with Hellenic descent too. The area, especially after the fall of communism had a significant
development and was a holiday destination for many Russians mainly. We find there many tourist resorts, and between them we see some luxurious that is addressed to Russian oligarchs. In the north of the country there are winter resorts, some of them deluxe for discerning customers who can afford it. Particularly, the warm subtropical Black Sea coast of Russia is the site for a number of popular sea resorts, like Crimea and Sochi, known for their beaches and wonderful nature. At the same time Sochi can boast a number of major ski resorts, like Krasnaya Polyana; the city is the host of 2014 Winter Olympics. The mountains of the Northern Caucasus contain many other popular ski resorts, like Dombay in Karachay–Cherkessia.

**Notably**

Unless exempt, tourists to Russia are required to purchase a visa, having at the same time a valid passport. Visas cannot be purchased at the border, and once at the border must be presented with other relevant documents. Among the factors which give Russia a poor score in tourism, the World Economic Forum (WEF) mentions poor land transport, safety and security issues such as high level of crime, lack of trust in police to provide protection and deaths caused in road accidents.

**Georgia**

Georgia after the complete removal from Russia, went through a period of economic instability, finding its new stride in the free market and trying to be stabilized. For some people, it still remains a question mark its course and if it has any interest for investment, whereas for some others Georgia has significant potential to develop as a tourist destination and a resort. At present tour packages that offer cultural, ecological or adventurous trips to Georgia are very competitive tourist products at international travel markets.

The key for development of the tourism industry in Georgia is enhancement and popularization of international image of the country. To achieve this goal it is imperative to actively participate and promote Georgian tourist products at international tourist fairs and exhibitions, which will ultimately result in increase of interest in the country and facilitate to creation of demand for tourist products.

In November 8-12 Georgia for the first time ever throughout its independence participated in the World Travel Market (WTM) in London. At the tourist fair the Georgian stand exhibited the state as well as private sector products. It is planned that the Georgian tourist product will be exhibited in Milan (BIT), Munich (C-B-R), Berlin (ITB), Tokyo (JATA) and London (WTM) tourist fairs. This will significantly increase interest to Georgia among professional stakeholders and potential tourists.

**Notably**

Work should be made in order to develop inside the country tourism in Georgia. Special attention is given to tours to rural arrears, as well as new types of tourism such as agricultural and wine tourism in Georgia.

According to the Department of Tourism and Resorts of Georgia, the word wine comes from the word “g`vino” of the Georgian language, and the oldest archaeological remains related to grape seeds and winemaking have been found in Georgia, while today the country has over 500 varieties of grapes.
Amendments were adopted by the Parliament in August 2004 to the Law of Georgia on Temporary entry, stay and exit of foreigners in Georgia. The amended law provides for simplified visa procedures and lowers visa tariffs, namely foreign visitors will be able to receive entry visas upon arrival not only in the airport, but also in every border check-point of Georgia.

**Turkey – Black Sea Area**

This location is a place of nostalgia for many Greeks who lived many decades in the area. There are many areas related to Greek culture in the Black Sea Area with great tourism interest. Bustling **Trabzon** is a large harbor city enclosed by the soaring peaks of the **Eastern Pontic Mountains**. Also, the Black Sea Coast's most famous attraction is **Sumela Monastery** (official name: Monastery of the Virgin Mary), which seems to sprout out of the sheer cliff face that encloses it. It's an atmospheric place where the history goes back to the Byzantine era, and it was only finally closed as a working monastery in 1923. Charming and cosmopolitan Sinop is both the most northerly point on the Turkish Black Sea coast and also the best-protected harbor. It is now a place of little consequence compared with its importance in antiquity, when it was a busy commercial city situated at the northern end of important caravan routes from Cappadocia and the lands of the Euphrates.

Chilled out **Ordu** is a top spot for Black Sea beach bums with plenty of gorgeous sweeps of sand both to the east and west of town. The village itself occupies the site of the Ionian settlement of Kotyora and though all hints of a grand past have long since disappeared, Ordu retains a sleepy charm. The **old Greek district** with its timber-framed houses lining narrow alleyways has bags of old world character and the seafront is quaintly old fashioned.

If you're a cherry fan you have **Giresun** to thank for them. It was from here that the Roman general Lucullus tasted his first cherry (the town's name stems from the Greek word for cherry) and took the fruit back to Rome. Giresun occupies the site of ancient Kerasous, founded by Miletus in the 7th century BC.

**Notably**

Turks make some efforts to develop the region and attract tourists, of which a great part is directed to the regions of Asia Minor. Nevertheless, it goes without saying that the excess rash of hotel developments, restaurants, bars and boutiques that has broken out along Turkey's Mediterranean and Aegean holiday Riviera is entirely absent here.
Chapter 6

Nurturing the Tangled Vine: “Ghvino” and the Future of Wine Tourism in Georgia

*Willis Hughes (USA), Boren Fellow, Tbilisi, Georgia*

In order to best assess the potential for the sustainable development of wine tourism in Georgia, four specific areas must be addressed. Following an introduction to the country’s history with viticulture and tourism, the first focus of this analysis discusses the strengths of the state’s industry. After exploring Georgia’s wine tourism advantages, the next area for examination is the business’s domestic shortcomings. With the industry’s weaknesses identified, this discussion then covers the country’s opportunities for further development. Once Georgia’s growth prospects are fully examined, the final focus of this essay explores the primary threats to the state’s market. With these areas of concern addressed, this analysis concludes its discussion with an overall evaluation of Georgia’s wine tourism industry and its prospects for the future.

**Introduction**

2013 and 2014 were incredibly fruitful years for the Georgian wine industry. After a seven year ban on the import of Georgia’s wine to Russia, Moscow rescinded its legislation banning Tbilisi’s exports in May 2013.¹ Following a damaging hail storm in the summer of 2012, the state’s wineries were pleased to see the 2013 harvest exceed expectations in both quantity and quality.² In December of the same year, UNESCO inscribed the qvevri, the clay vessel used for the fermentation of grapes in traditional Georgian wine making, on its Representative List of the Intangible Cultural Heritage of Humanity.³ And in March 2014, Tbilisi hosted the International Wine Tourism Conference, where Georgia received a chance to introduce industry professionals to all that the country had to offer oenophiles.⁴ Collectively, these events brought greater attention to the region commonly known as the Cradle of Wine.⁵ More importantly, however, this recognition provided the state with a greater impetus to grow its wine tourism business.

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As wine tourism continues to develop across the globe, Georgia’s motivations for growing its industry are coupled with strong institutional support. The country’s government takes an active role in the process, relying on its National Wine Agency to work with organizations and individual wineries to improve international recognition of the state’s business. With this support, entities such as the Georgian Wine Association and Schuchumann Wines continue to elicit attention from the global community and to increase recognition of the region’s brands. Yet, as a country that possesses few opportunities for economic advancement, any attempts to further develop this industry will need to answer one important question: can wine tourism translate into sustainable growth for Georgia?

In order to answer this query, this essay examines the state of Georgian wine tourism and its potential to increase the current level of interest in the region. Through research and interviews with industry professionals in Tbilisi and across Kakheti, this analysis addresses the strengths, weaknesses, opportunities, and threats to the state’s wine tourism business. With this analysis complete, Georgia’s prospects for sustainable development will be demonstrated to be favorable as long as the country can address some of its issues in the near future.

**Georgian Ghvino and Tourism**

Wine is extremely important to Georgia for a number of reasons. From a cultural standpoint, *ghvino*, the Georgian word for wine, is nearly synonymous with the country’s history and traditions. Throughout periods of invasion and Sovietization, Georgia clung to the production of wine as a celebration of its heritage. The toast, “gaumarjos,” which translates to both, “cheers,” and, “victory,” is a clear representation of this point, as the country links the drink and its production to a celebration of the nation’s survival. Furthermore, Georgia’s title as the Cradle of Wine is supported by archeological evidence that presents the country as the longest continuous producer of wine in the world. Discoveries from as recently as 2012 link the region with viticulture and winemaking activities from the sixth and fourth millennium BC. Yet, even though these linkages are impressive, this activity would not be as remarkable without an economic yield.

Although Georgia is a small country of roughly seventy thousand square kilometers and less than four and a half million people, the state’s wine output in terms of GDP is comparable with some of the most well recognizable regions in the world. At roughly one percent of the state’s GDP, the country competitively compares with Argentina, France, Portugal, and South Africa. In terms of exports, Georgia recouped $130 million in 2013 and through August of 2014, the country has already brought in $118.5 million from its wine sales abroad. Thus,

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with a strong economic and traditional background in place for the wine industry, the impetus is clear for connecting the business with the state’s most vital trade: tourism. Much like wine, the business of tourism holds great importance to Georgia. Even in the face of the state’s history of war and occupation, the hospitality of the Georgian people remains a source of pride for the local population at an individual and communal level.\textsuperscript{11} Through the industry’s long standing connection to the country’s heritage, this sector represents the state’s primary means for economic growth outside of the transit of natural resources from Azerbaijan. With the number of visitors to Georgia increasing from just over two million in 2010 to more than five million in 2013,\textsuperscript{12} the country has already succeeded in improving its overall tourism apparatus. However, as 2014 only shows a one percent increase in arrivals over the same time period,\textsuperscript{13} the government must act quickly if the state is to continue its development of this industry. Thus, the field of wine tourism, where travelers visit a destination for the purpose of sampling or learning about wine, represents an excellent opportunity for Georgia to share its traditions and to improve its economic prospects for the future.

\textbf{Strengths}

One of Georgia’s greatest strengths is its wine’s increased international reputation following the Russian embargo against Georgian wine. Although ghvino remains highly thought of in the states of the former Soviet Union, many Western oenophiles did not become aware of the country’s vintages until Moscow enacted its embargo. Before Russia’s ban, Georgian wine production and development was stunted. Russia purchased more than ninety percent of the state’s exports and preferred only a few varietals of the country’s diverse grape selection.\textsuperscript{14} After 2006, however, Georgia received a considerable amount of funding from USAID and other international organizations in order to refine its production processes and to enhance the international competitiveness of its wine. These developments allowed the country to build a reputation as a high-quality vintner who relied on its own, traditional methods of wine making and on the diverse varietals of grapes located within its borders.\textsuperscript{15} With this rebranding of ghvino as a luxury item, the state thus created an image of itself as an exotic and must see location for wine lovers. Today, this identity represents one of the industry’s main attractions: a blending of culture and adventure in the birthplace of wine.

Aside from the country’s improved image, another of Georgia’s strongest features is the government’s institutional support for its producers. As stated earlier, the state works exceptionally well with its domestic partners in the promotion of the country’s wine. One example of this connectivity came in 2014 when Georgia took over chairmanship of the Wine World Trade Group. This leadership position allowed the National Wine Agency to promote

\textsuperscript{13} Ibid.
\textsuperscript{14} Jackeli, Malkhaz. Personal Interview. 28 Oct. 2014.
\textsuperscript{15} Ibid.
some of the state’s best natural wines at the prestigious London International “Real Wine Fair,” and to introduce small-scale winemakers to new, international markets. With this kind of institutional support, the general level of awareness of Georgian wine amongst oenophiles can grow rapidly. Moreover, continued cooperation between the administration and its businesses enables the entities work together to ensure travelers remain interested in the region with the proper marketing strategies.

**Weaknesses**

Like most developing countries in the world, Georgia’s primary weakness is its underdeveloped infrastructure. While some wineries, such as Schuchmann Wines and Chateau Mere, operate small resorts for tourists, the country’s wine making regions generally lack suitable accommodation for international travelers. Highly ranked hotels from Marriot and Radisson do exist in the larger cities, but most observers feel that without mid-range hotel development, tourism in the region will be unable to develop beyond its current levels. Georgia’s GMT Group is hoping to change this situation with the opening of Marriot’s budget property, Moxy, in Tbilisi. However, this project will only spread if it is first successful in the capital.

Further complicating these accommodation issues is the state of the country’s system of roads. While Georgia received one hundred and seventy million euros to rehabilitate its East-West highway in 2012, many of the roads that connect travelers to its wine making regions remain in disrepair. The state’s status as one of the more dangerous regions for traffic safety in Europe, with over fifteen road deaths per one hundred thousand, only adds to this issue. Without substantial improvements to Georgia’s system of roads and access to the region’s desired tourism centers, the country’s industry will struggle to sustain its economic growth potential.

**Opportunities**

With the recent acknowledgement of the country’s craft by UNESCO, Georgia’s greatest opportunity to develop its wine tourism business is to increase its promotion of the state’s natural wine production. While the National Wine Association has already published works such as Alice Feiring’s *Skin Contact* on the industry, bio-wine, as the beverage is often called domestically, is not well known outside of the state’s borders. As a craft that uses the ancient traditions of the qvevri and other organic practices, natural wine represents a major point of interest for wine lovers around the world. Wineries such as the Jackeli Family’s Organic Vineyard understand this idea and actively promote, “the path of [natural] wine,” for those

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who are unfamiliar with its techniques.\textsuperscript{21} With the further promotion of this style of production, Georgia stands to build off of its already unique reputation and to potentially attract other, non-wine tourists who are interested in learning about different farming techniques.

Outside of the vineyards, local wine bars, such as Tbilisi’s cooperative natural wine bar, Ghvino Underground, also stand to attract many international visitors if they can link their products to this unique style of winemaking. Even though such establishments are not uncommon in the country at the moment, an increase in the amount of bio-wine cooperatives would allow the beverage to remain a fixture of the country’s domestic attractions. If spread out across the country, these natural wine bars could highlight the production of specific varietals or individual regions, thus becoming must visit tourist attractions.

**Threats**

In a region with a history of conflict, the state’s competition from other nearby wine producers cannot be ignored. Armenia, Azerbaijan, Iran, and Turkey all hold varying degrees of evidence that position their nation as the birthplace of wine. Ankara is even the beneficiary of DNA research which presents southeastern Anatolia as the first location of grape vine domestication.\textsuperscript{22} In addition to this information, Turkey is the only country of the four with a truly developed tourism sector and its own burgeoning wine market. Although Turkish wine lacks the international acclaim of Georgian vintages, the country’s status as a global tourism destination and the state’s available capital for increased investment in any sector represents a clear threat to Georgia’s market.

Aside from other competitors in the wine tourism industry, another threat to the further development of the state’s business is its perception as a dangerous destination. Even though Georgia is revered for its progress since the fall of the Soviet Union, the fate of the country is commonly viewed as unpredictable due to the volatility of the region and an uncertain political future. The state’s conflicts with Abkhazia and South Ossetia remain unsettled and the region’s issues in Nagorno-Karabakh, southern Turkey, and even eastern Ukraine represent potential threats for the future. Furthermore, the recent regime change in Georgia and the uncertain future of the victorious political party, the Georgian Dream Coalition. This potential instability brings into question the government’s ability and or willingness to maintain its current level of support for the wine and wine tourism industries, and discourages future foreign investment. Although solutions to these issues are hard to find, if Georgia is unable to remove its potential patrons’ concerns, the continued development of a sustainable wine tourism industry will be quite difficult.

\textsuperscript{21} Jackeli, Malkhaz. Personal Interview. 28 Oct. 2014.

Conclusion

With an analysis of the strengths, weaknesses, opportunities, and threats to Georgia’s further development of its wine tourism industry, wine enthusiasts should be excited for the state’s prospects. The advantages and chances for further growth afford the country an ability to build a wholly unique image in the world of wine making that greatly outweighs the current issues facing the industry. If Georgia is allowed to continue on its current path of development, the state’s wine business will gain further investment and interest from the international community. With this heightened awareness of the country’s products, there may soon be many more people in the Caucasus raising their glasses to say, “gaumarjos!”
Chapter 7

Trends of tourism marketing in the digital era

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Abstract

The article describes current trends in Web 2.0 activities, which can be used in the field of tourism. Recent studies show that the Web 2.0 is very effective in promoting destinations and attracting new clients – tourists, investors and business. With the growth of the internet - medium of 20th century, the importance of social media is still increasing, a fact that is reflected in the work of practitioners in the tourism industry. The paper discusses the application of these new marketing communication tools such as social media, digital media, online newsrooms to build or improve image of the destination, as well as travel marketeers’ attitudes to these new form of activities.

Introduction

Destination marketing is represented by a group of different services concentrated in certain areas which are provided in relation to the potential of tourism (attractions) of the place. Attractiveness of the destination represents the essence of the destination and also a major motivational stimulus for the visitor of destination. Destination marketing and promotion of tourism therefore, directly depends on the awakening of interest in the area or combination of services, typical for the area. The main features of the service include immeasurability (quality of services is perceived emotionally, rather than by tangible parameters), inseparability (from dependence on organization and interconnection to the destination), heterogeneity (diversity of offered services within the destination is high), temporality (using the services only during stays by visitors) and relationships between services and operators (product formation occurs natural synergy).

Compared with traditional advertising, the use of Web 2.0 marketing tools are able to positively influence public awareness by the costs corresponding with the fraction of the budget provided for such a campaign. The main reason is that companies do not pay for the provided space or time in the media. The main costs for Web 2.0 marketing tools are salaries of employees who are responsible for compiling and sending messages and managing various events (Sahinidis, A., 2013). If the Web 2.0 marketing tools department can create and then publish an interesting story that the media take over it can save money. Than a campaign may have a value which corresponding with advertising campaign in the value of millions of dollars. Some experts states that consumers are influence by editorial up to five times more likely than in the case of advertising (Kotler Keller, 2007).
Digital and social media and Brand personality

Social media are also called “The new hybrid element of the promotion mix” (Mangold & Faulds, 2009, p. 357). Social media’s function is not limited. It can be used for the promotion mix of a company, but also as tool for the total communication mix of a company. It was found that in the USA PR practitioners have become accustomed to the more established tools of social media, i.e. intranet and e-mail, so they are comfortable with podcasts and blogs. But on the other hand they are more restrained toward remaining tools of social media like virtual worlds and networks (Eyrich, Padman & Sweetser, 2008). It can be assumed that US practitioners who work with social media tools and social networks understand better to prestige, structural and expert power in their company (Diga & Kelleher, 2009).

The European Communication Monitor (ECM) in the 2010 edition paid attention to social and digital media and concluded that “Digital and social media are gaining importance in European organizations, but they are not the most important element of the organizational media mix in Europe today. Addressing print media, in other words working with journalists as gatekeepers of the news media is still the most important communication channel for European PR professionals” (Verhoeven, Tench, Zerfass, Moreno & Verčič, 2011, p. 3). Nevertheless, the importance of social media and generally online communication is expected to take over the leading position in the following years. The research also showed that European practitioners like USA practitioners also rather prefer tools of social media (digital communication) more than new developments, such as micro blogs and weblogs.

The tourism makes use of marketing, advertising and public relations strategies to promote strictly managed image (Morgan & Pritchard, 2005) and also to improve economic performance through attracting international tourism and business (Aronczyk, 2008). Through social media it is possible to concentrate the public relations efforts on both the communication of prepared image and also for the creation of dialogue with potential tourists or tourists. For Destination Promotion Organizations (DPOs) is good choice to use online communication because it creates two-way interaction to reach various publics. This is not always possible by using off-line communication (Bruell, 2008; Garcia, 2008; Pavlik, 2007). These communication tools make potential tourists to feel personally connected to offered destination, as they allow reply to requests immediately which leads to satisfying individual needs (Fall, 2004).

Every country or destination has some kind of image that presents to its international public. So it is on the public to form and idea about a country’s reputation. Furthermore, it is a major economic interest of the country to try to somehow manage its image or reputation, which is always based on two kinds of experience: firstly, an experience from travelling to the destination or using its products and secondly, a second hand experience gained by word of mouth communication or by information presented in media (Yang, Shin, Lee & Wrigley, 2008).

In 2012 a research was conducted that examined how popular tourist destinations, such as Mexico and Brazil communicate their image (or brand personality) by using Facebook (De Moya & Jain, 2012). Brazilian tourism office decided to manage international tourism advertisement, promotion and marketing support to improve its image all around the world. Destination Promotion Organizations of Brazil applied a variety of strategies, which included a Brazilian Trademark and presented Brazil as a credible, hospitable, young and cheerful destination. They also decided to maintain an official website of the country.
(www.braziltour.com) and begin to use networking sites such as Twitter, YouTube and Facebook (De Moya & Jain, 2012). The promotion of Mexico applied also advertising, marketing and relations strategies and they wanted to present Mexico as a leading tourism destination (Mexico Tourism Board, 2009). They applied the same strategy as Brazil on the internet, that is they maintained an official website (www.visitmexico.com) and join social media group as Twitter, YouTube and Facebook (De Moya & Jain, 2012).

The data sources for the examination were messages placed on the official Facebook website of Mexico and Brazil. Facebook was chosen as it is a representative social media - a large social web system used primarily for social networking, communication between users, sharing of multimedia data, maintaining relationships and entertainment. It was founded by Mark Zuckerberg, a former Harvard student in 2004. It has more than a billion active users and it is fully translated into sixty-eight languages. Because of its widespread use is being increasingly used for marketing communications - including public relations.

The research findings revealed that Facebook “friends” are very interested in participating in a dialogue about the destination with its actual promoters. In both cases Facebook “friends” started conversation and posted responses to messages. It was also found that number of interactions between members of the public (via Facebook) and destination promoters sometimes do not mean that they agree on the message transferred (De Moya & Jain, 2012). The results of this study have a few practical and theoretical implications for the branding and promotion of tourism destinations, since it became clear that the significance of social media, such as Facebook, cannot be underestimated. It is possible to influence various publics and change the awareness of a tourist destination (image, reputation). Therefore, it is necessary to learn how to use and work with this still quite new tool. It is changing, developing and growing everyday and companies have to adapt to new trends and environment.

**Web 2.0 effect on Travel journalists, online newsrooms and media relations**

The internet as a medium of 20th century has significantly changed the media environment. Now journalists have opportunity to gather needed and actual information online. Of course, the organizations were forced to change the way how they interact with the news media. More and more public relations practitioners work with various internet technologies (e. g. websites, e-mails, online press rooms, multimedia news releases, social media and RSS feeds), so as to ensure better communication with journalists and strengthen their media relations. The organizations try to facilitate journalists the access to important information (e. g. fact sheets, press releases, newsletters, backgrounders, video clips, brochures and many others downloadable materials) and thus establish online rooms on their corporate/organizational websites.

A study by Yoo & Kim in 2013 examined the use of newsrooms on the field of 50 U. S. state tourism website as well as their availability and contents and evaluated the level of meeting media’s needs and availability of social media on this websites. The findings showed that “online newsrooms are available on all state tourism websites except two, which indicates that the state tourism offices understand the importance of media relations in their communications. Most newsrooms were directly linked from the state tourism website homepages and were well-labeled with names that include at least one of the following three terms: press, media or news. PR contact information was easy to find in most state tourism newsrooms with an average of 1.1 clicks from online newsrooms’” (Yoo & Kim, 2013, p. 6).
Despite these findings there is still need to improve the way how newsrooms distribute content. Newsrooms most commonly use the internet for distribution of contents. The second most common method is RSS (Rich Site Summary) feeds features (a third of them). Surprising is that 14 of the newsrooms do not use any distribution method, as they do not offer any news subscription features usable for modern mobile devices. Due to the recent strong growth of mobile technologies (Stratigea, A. & Panagiotopoulou, M. 2014; Canalys, 2012) it necessary to provide online newsrooms that are mobile-friendly – it means that contents should be definitely accessible for users via mobile devices. The fact is that most of journalists (60%) considered the possibility of receiving news on their mobile devices as important part of their everyday work and 10% of journalists found out this possibility as very important (TEK Group, 2012).

It was also found that all of 50 U. S. state tourism websites have one kind of social media at least. Due to the fact that more and more journalists are participating in discussions on social media and also use them as a source for their work, it is a very positive sign. One recent study (TEK Group, 2012) support this view, as it was found that 26% of journalists during their searching of stories often or very often use a company’s Facebook page. 43% of journalists reported that they definitely (9%) or possibly (34%) give preference to receive information and news by a timely tweet. The claim that blogs are an important source of information for journalists is support by the finding that 92% of them usually attend company’s blogs whenever they are looking for a new story.

Advertising is one of the key components of the marketing mix for the tourism industry, as marketeers try to inform tourists about offers of particular region, country or individual business (Vitouladiti, Ou., 2014). While a lot of money is invested into basic materials (e.g. pamphlets and brochures) more and more attention is paid to the role the media can play in supporting public relations efforts (Kavoura, A. & Katsoni, V., 2013). This is because mainstream media have over the past few decades introduced an ever-growing amount of lifestyle content, among which travel journalism output has been prominent. Major newspapers around the world now publish regular glossy travel supplements for readers, and some television channels are entirely devoted to broadcasting travel programs, such as the US-based Travel Channel. As a result, scholars have begun paying more attention to the relationship between the media and tourism, with a focus on how destination management organizations (DMOs) can maximize PR efforts through media output” (Hanusch, 2011, p. 1).

Conclusion

Nowadays, organizations and destinations have to adjust their methods and techniques to reach changing needs and expectations. They need to follow new trends and develop a suitable marketing mix for them. Organizations and destinations can influence chosen focus groups through fan pages on their website and/or create discussion with Social media "friends" to promote or improve the image of their destination, as Brazil and Mexico have already successfully done. Organizations and destinations cannot forget to communicate with travel journalists as well. Not only have they to provide them with suitable and sufficient materials to make them satisfied, but they also new methods can be used, such as the creation of online newsrooms and communication with media via social media. The author supports the view that tourism websites should provide direct links to social media from their online newsrooms, the use of blogs is rising in importance among journalists, and in the
coming years we should expect ever greater development of the above mentioned methods that tourist organizations and destinations have to adapt on and learn how to work with them.

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Chapter 8

Event and Festival Tourism in Bulgaria

Gabriela Korcheva (Bulgaria), Specialist/Expert at the Southeastern Europe Directorate at the Ministry of Foreign Affairs of Bulgaria

Abstract

The Black Sea region, with its diverse and unique landscape, cultural wealth, historic heritage and wide variety of opportunities for leisure, stands among world’s most beautiful tourist destinations, attracting millions of tourists from around the world.

Last 20 years people are intensively traveling to enjoy festival and events abroad. Tourism is changing globally. Festivals and events are of interest to all kinds of visitors – young people, wealthy adults, family settled people. Different occasions supplement interactivity and an element of uniqueness that attracts visitors to participate actively.

Moreover, event tourism contributes to the development of local and regional infrastructure and economy, attracting more investment to the region.

The Black Sea Region has perfect conditions to develop this type of tourism with its different landscapes and ancient culture and history.

Keywords

Tourism, event, festival, Black Sea region, development, investment, culture, history.

Event tourism – facing new challenges

Events are an important motivator of tourism, and figure prominently in the development and marketing plans of most destinations. The roles and impacts of planned events within tourism are of increasing importance for destination competitiveness. Yet it was only a few decades ago that „event tourism” became established so that subsequent growth of this sector can only be described as spectacular in many countries and regions in the world.

Equally, „event management“ is a fast growing professional field in which tourists constitute a potential market for planned events and the tourism industry has become a vital stakeholder in their success and attractiveness. As well, events have other important roles to play, from community-building to urban renewal, cultural development to fostering national identities.

The event perspective is potentially growing each time you organize and held a measure because of interactions among the setting, people, and management systems. Nevertheless, there are varieties occasions of organizing an event - encompassing festivals and other celebrations, entertainment, recreation, political and state, faith tourism, scientific, sport and arts events, those in the domain of business and corporate affairs (including meetings, conventions, fairs, and exhibitions), and those in the private domain (including rites of passage such as weddings and parties, and social events for affinity groups).

The variety of music, folk and cultural events, held throughout the year in Bulgaria has great importance for the development of the festival and event tourism. Despite, the promotion of
each event takes years to become a symbol that attracts large numbers of tourists which could be asses as a treat to the sector development.

Through the dynamic change of global tourism consumer psychology also is changing, as tourists seek new experiences, unusual destinations, satisfaction of interests and emotions.

Nevertheless, events, festivals and attractions are part of the culture, folklore, faith and wine tourism. In addition to the history, culture, legends and crafts, they created memories. Modern tourists travel more and shortly, choosing bargains, but their money are seeking knowledge, authenticity and experiences.

### Event & Festival tourism SWOT analysis

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
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<tbody>
<tr>
<td>- Divers of events during the whole year;</td>
<td>- lack of transport connectivity between the countries, with other continents;</td>
</tr>
<tr>
<td>- Concomitant development of other products – eco &amp; rural tourism;</td>
<td>- sport facilities requires large investments;</td>
</tr>
<tr>
<td>- Preserving local traditions;</td>
<td>- negative impacts associated with adopting marketing orientation;</td>
</tr>
<tr>
<td>- Using mythical traditional elements in performance of ancient customs;</td>
<td></td>
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<tr>
<td>- Interactive presentation of cultural heritage;</td>
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</table>

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Impacts on adaptation of infrastructure;</td>
<td>- potential market shifts that could affect demand for this product;</td>
</tr>
<tr>
<td>- promote alternative attractions and regions;</td>
<td>- external competition regions;</td>
</tr>
<tr>
<td>- events and festival are attracting tourists to slightly known destinations;</td>
<td>- regions become increasingly involved, or even dependent upon event tourism;</td>
</tr>
<tr>
<td>- big events provoke construction of infrastructure and new sport and musical basis;</td>
<td>- accumulation of events in one period;</td>
</tr>
<tr>
<td>- positive image;</td>
<td>- product commercialization of authentic traditions;</td>
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<td></td>
<td>- mass attendance and negative impact on local communities;</td>
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<td></td>
<td>- overlapping products;</td>
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<td>- damage on the natural landscape;</td>
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### Event tourism in Bulgaria

Bulgaria along as a part of the South-East Europe and the Black Sea Region offers a numerous perspectives for holding festival and event tourism. As it was mentioned yet below, there are
varieties of occasions during the whole year, presenting the cultural-historic heritage of the country. The biggest among them in different categories are presented in the next several lines:

**Cultural-historic festivals**

*Festival of the Bulgarian rose* – in several cities in the South of Bulgaria, biggest among them in Kazanlak. These events which are traditionnaly held in the begining of June are unique bulgarian tradition, exemple for a succesful event tourism management. Only for three days around 60 000 tourist witness the interactive festival offering the rose picking, destilation of attar, branding etc.

*Nestinarka – dancing on fire* – Fire dancing is found in the Strandzha mountains on the feasts of St. Helen and St. Constantine. The Nestinarka (fire dancers) perform in a chapel specially erected for the occasion. This tradition which is a part of the UNESCO Heritage from 2009 is an example for good promoting and attracts many foreigners to witness the magic.

*International festivals “Sourva” - Sourvakari* are masked dancers who wear coats made of goat skin or "tatters" and pointed hats around six feet high. They have large bells tied around their waists which clang loudly as they move. They carry wooden swords and a decorated cornel twig called a sourvachka. Each year, around 5000 people get involved and over 90 groups are showed from all ethnographic regions of Bulgaria and guests from Europe, Asia and Africa.

**Musical events**

There are tree emblematic events during the summer – *Spirit of Bourgas, Bansko Jazz Festival, Kavarna Rock Fest*, attracting tourists from Russia, and Western Europe.

**Sport events**

Bulgaria successfully held the Ski World Cup 2012 in Bansko, FIS Alpine Ski World Cup Women’s Giant Slalom 2013 in Pamporovo. In 2014 Borovets will hold European Cup in Alpine skiing for men. This will lead to the adoption of more tournaments in this class. Sport tournaments have a great potential for developing event tourism – jointly hosting of different sports event in the region shall be considered as a possibility.

**Proposal on enhancing the regional development of sustainable tourism that would have a positive impact**

Natural resources and culture heritage are primary assets of the Black Sea Region. Partnership between the countries could be a good platform for achieving more sustainable benefits together. It would be good to consider a proposal on jointly hosting of international sport events.

Likewise, a new product could be created as a part of the common branding of the Black Sea Region as a tourist destination, named for example *“Black Sea region a la carte”* - joint calendar of events reflecting different folklore and sport occasions. Map of the routes could have a positive impact, connecting events in two or three different countries.

Tourist agencies and local stakeholders should offer bigger tourist packages for longer period thus attracting wealthy visitors and more money.
A digital platform should be constructed, illustrating the transregional event routes combined with special offers for accommodation in an authentic way and local meal.

There are many more ideas which should be considered and developed as outcomes:

- Exchange between the countries, universities, gastronomic academies. Establishment of event management tourism as an academic discipline.

- One International Black Sea event – more like bazar or fair, organizing a culinary competition or a competition between different breweries. Subregional festivals – Balkan, Caspian, others;

- Developing product brand – A Store opened in every country of the region, offering unique products drinks and foods from the Region.

- Joint cinema festivals as well as establishment of movie award.

Event tourism with all its benefits is a considerable opportunity for developing sustainable tourism in the region of the Black Sea. Moreover, it is a new type of tourism making which offers interactivity. Tourists involved interactively are given the opportunity to acknowledge and understand regional and sub regional uniqueness. There is a way to open a cultural discussion making the tourists witness to the ethnographic diversity. Exploring the region offers possibility to dive deeply and empathic to different world. It is a new way of tourist traveling into different times and ages. This type of tourism is making the tourist popularity of the region increase. Event and festival tourism is an opportunity for the region to present effectively its complexity.
Chapter 9

Sustainable Tourism: an Asset for Development in the Black Sea Region

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Social and Economic Impacts

Nowadays, tourism is one of the most essential developing factors for the national and international economy. Talking about tourism, it is important to mention that it contains a range of different types such as leisure, adventure, cultural, religious, business, medical, sports, eco tourism and many more. The aim of a sustainable tourism is to preserve in high level the satisfaction of tourists through continuous practices. Usually, tourism may have influences in socio-economic and cultural environment however it is the most flourishing way for growth.

Furthermore, the competitive advantage of Black Sea is the wealth of assets that are differentiated from other destinations such as unique landscapes, local heritage, sophisticated regions and friendly, open-minded population. However, it is seeking to recover and improve its conditions by investing with passion in sustainable tourism. In order to increase effectively the level of sustainable tourism it should always carry on local tradition, authenticity, and culture of each country and develop positive attitudes towards each other.

From the social perspective, tourism can contribute positively in the benefit of local communities. Social contacts between tourists and local people is a way to exchange different opinions, ideas and improve the international way of thinking by establishing social infrastructure such as schools, universities, libraries and wellorganized care institutions. This may result in the creation of new job positions, income distribution and poverty alienation that can uphold effectively the social development.

In order for sustainable tourism to flourish Black Sea, vital actions should be performed to generate it. Physical infrastructure links (such as air ports, roads, hotels, transportation) are connected with social perspectives. It is an important way of connection and collaboration between countries; for that reason, political aid facilitates in opening “pathways” for discussions and common interests. Pollution issues, which create unsustainable conditions and unwillingness to visit or invest in the Black Sea, can now be effectively solved with the collaboration of countries around the area. Another social impact is the significant environmental projects in order to prevent excessive nutrient discharges from agriculture and other sources of pollution, and they are conducted to sustain the marine life. The project in Bulgaria for example, supported by the Investment Fund for Nutrient Reduction, aims successfully to reduce nutrient loads entering in Black Sea and Danube Basin. The consequence was to adopt an environmentally friendly agricultural activity and lead several rare animal species to return.
Additionally, technological advancements, digital infrastructure as well as marketing and advertising skills are potentials that may attract tourism, contributing in the social status of people. Nowadays, the knowledge and information are broadcasted through digital media. Through this investment, more travelers have the chance to be better informed of the advantages offered from the Black Sea countries. Furthermore, through sustainable tourism, tourists become more and more experienced and they expect continuously good quality deals, services and prices. Participating in business trips, conferences and meetings is an action of “holiday” tourism giving the opportunity to people to get to know better the area they are visiting.

Privileged is the geographical position of the countries that are planked around Black Sea for touristic investment since there are plenty of resources to admire and utilize. Natural resources, historical heritages, landscapes, significant sights and gastronomy are assets that raise awareness. All these elements attract more and more ecotravelers that are interested in the natural way of life surrounded by natural circumstances and geo-travelers focusing on “the sense of place”.

From the economic perspective, the European recession and the current uncertainty has influenced a lot the demand for investments and exports in Black Sea. As it has been observed in this area, government’s consumption is downward as it focuses more on long-term efforts on how to improve their fiscal position. Therefore, Sorong political leadership and unification is necessary to ensure improvement in tourism. Moreover, the energy presence as well as the oil and gas extraction of the rich states of the Black Sea, attaches a competitive advantage in the region’s profile. Renewable energy also is a great potential for growth and catches the attention of many investors around the world.

**SWOT Analysis**

The SWOT analysis is a tool used to compose an internal and external scanning of the Black Sea area; to understand if the area is able to follow its opportunities and capable enough to defend against external threats. As discussed previously in the paper, the consolidated results are collected and presented in the following table:
Weaknesses and threats are characteristics that could cause troubles in the Black Sea’s mission in order to advance sustainable tourism. The pollution and environmental issues discourage the interest of tourists since the number of conscious travelers has increased a lot; as a result they search for clean destinations without environmental or social problems optimizing also the economic benefits. The weak marketing and promotional strategies persist in tourists’ unconsciousness concerning the historical culture and gifted resources of the Black Sea area. As a result, there is weak appeal in visiting the area. Keeping immature the advertising of special characteristics of each country, it may have terrible results in socio-cultural identity and authenticity of the region. High level of uncertainties around the Black Sea area, such as political, economical and even the different currency among countries are factors that increase the awareness of new investors and the hesitation of travelers. Another important weakness for sustainable tourism in the Black Sea area is the VISA issues, which limit tourism movements.

Proposals
1. Invest more in tourism

With the appropriate help of the organization of the Black Sea Economic Cooperation (BSEC), that aims to promote the liaison among the regions of Black Sea, it should have implemented more specific programs for the enhancement of sustainable tourism. The reduction of barriers will attract more investors to empower the touristy sector of the regions by constructing new or better infrastructure. The Black Sea region should follow the market trends in terms of logistics (such as infrastructure, regulation and information) and the new
routes, keeping the level of attractiveness in a competitive position. Travel agencies also should purchase by venture capital rewarding users. In addition transportation and infrastructure facilitate the visitors to move on from, to and within the regions saving time to walk around in new landscapes. By encouraging collaborations with emerging markets, EU countries may retain people with exceptional skill and talents who are able to contribute in the overall plan.

2. Promotion and branding strategies

For the contemporary competition, placing branding in the tourism sector is an essential part. Through that, a chance for the Black Sea is given to attract more domestic and international tourists, capital and firms investing there and becoming the “winning” place. Using existing or upcoming nation brands to enhance a common brand should be appropriate. Allow brands and trends to freely form in local levels or top-down approaches of uniting common features of all countries into one brand, are means to increase the overall image of the area. Subsequently, the question that emerges is if such a brand is possible or desirable for the specific purpose.

3. Shape tourists’ perceptions

Education and outreach are the most important features for tourists, working with existing perceptions as target to broaden them along the way. Throughout the countries involved in the Black Sea area, major rotating events should be developed and geared at the foreign markets enhancing the tourists’ curiosity. Various concerts with well-known artists and assets, such as wineries, will increase the interest of tourism since it is a product with universal appeal. Sport events (during winter or summer period) as well as business conferences should be promoted in Russia, Turkey or Moldova, which already provide the appropriate luxurious infrastructure for travelers. Moreover, films taking place in countries along cultural routes providing the philosophy, gastronomy and wealth of the region should augment the level of cultural education.

4. Build competitive digital infrastructure

Strong digital infrastructure is one of the most important elements for Black Sea in order to achieve a sustainable tourism in the area. Since nowadays tourism depends a lot on the use of word-of-mouth opinions and recommendations, therefore social platforms give the opportunity to easily share tips and suggestions, which can be enormous and valuable especially when they are positive. A common platform or website for example a Danube platform providing alternatives of different types of tourism such as eco tourism, adventure tourism and wildlife tourism. Family tourism in this area should be also highly recommended as it combines cultural, adventure and leisure tourism.

To sum up, regardless of the economic recession that is related with the majority of the threats of improvement, I believe that the Black Sea region has strong perspectivas to become one of the most tourist leading destinations as its geographical position brings lot of benefits in all of the regions, especially as it is a crossroad for the EMEA region. Through social and economic improvements, the demand of tourists increases and they are more motivated to explore all aspects provided. The sustainable development of natural sources, the environmental management policies and procedures and the continuous innovative ideas that are noticed since now are promising parts to build a strong basis for a sustainable tourism.
Chapter 10

Tourism is the key driver for Socio - economic progress in the Black Sea Region

Georgia Miloni (Greece), Student at the Department of Political Science and Public Administration at the National and Kapodistrian University of Athens

For the past 60 years, tourism has experienced continued expansion and diversification, becoming one of the largest and fastest-growing economic sectors in the world.\(^{23}\)

Tourism can play a key role in enhancing and disseminating regional development, while also improving bilateral relations and strengthening trade and business within the Black Sea region. The Black Sea region appeals to travelers who want to see and do something different, to those who want to connect to their heritage, to those who want to experience natural wonders, to those who want to see history and the cradle of civilization and also have great hotels, beaches, food and wine, and attractions.

The future economic impact of tourism on the Black Sea region will exceed $450 billion by 2022 and will represent over 7% of the overall economy.\(^{24}\) What makes the Black Sea cultures distinctive and attractive to travelers is the way their component parts came together over the millennia to shape unique communities, languages, religions and trade. It is the perfect environment for all forms of sustainable tourism.

Situated at the crossroads of Europe and Asia, Black Sea Region is a very different place today than it was in 1999 and even more dramatically so than in 1989. The transition from a state-led to a market – oriented economic system has, to great extent, been completed. It is an undeniable fact that the region’s increasing importance implies an urgent need to meet existing and emerging challenges. What is also needed is a commitment by all parties to realize the region’s potential. The composition of the Black Sea region is highly diversified in terms of the size and power of its countries, the sophistication of their economic and financial structures and their cultures and history. Black Sea basin represents a vast web of interconnected multicultural experiences, ecological diversity and history spanning thousands of years. This should not be an obstacle but rather an incentive to creative thinking and pragmatic action. The Black Sea Region has to become a model for new and imaginative types of economic development and tourism is the key of success.

In fact, to achieve economic development in the Black Sea area there is a need for a planning process for tourism development. Planning and implementation, these two processes are parallel and complementary and can provide a general framework guiding local community, planners and decision-makers. This framework consists of principles, goals, objectives and policy measures in regard to tourism development in an area on the basis of the area’s distinctive characteristics/features respecting local capacities to sustain tourism. Therefore management of

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\(^{23}\) UN World Tourism Organization
\(^{24}\) WTTC Travel & Tourism Economic Impact 2012
tourism growth is necessary and has to focus on policy measures for implementing the sustainable tourism development in the Black Sea region.

Tourism development is particularly important for the Black Sea region where the most popular tourist destinations are the coastal areas, protected areas and historical settlements.

**Coastal areas:** Coastal areas are normally associated with mass tourism, large scale construction and infrastructure, intensive land development and extensive urbanization, a prevalent model in most Black Sea destinations (e.g. Mamaia, Romania, Sunny Beach Bulgaria).

**Protected Areas:** Tourism in protected areas is associated with appreciating and observing nature, scientific endeavor and education. This type of tourism is associated with minimal development of infrastructure and small scale interventions in areas of normally-strong control and restrictive management.

**Rural areas:** Tourism in rural areas covers a wide range of purposes (motivations) and is usually associated with visiting areas of special beauty, being in nature, low intensity activities but widely dispersed around low density-often remote- rural communities. In some areas agro-tourism falls within this category.

**Historical settlements and towns:** Tourism is attracted to historic towns as a result of the built cultural heritage, urban amenities, lifestyle and cultural traditions, cultural events, etc. There can be several types of tourism in this category. The dominant type is mass tourism associated with large numbers of visitors centering on monuments, museums, etc. often of a short stay (even daily visits).

The characteristics of the locality provide the basic structure for the development of tourism. These can be evidenced in terms of local resources, the vulnerability of local natural ecosystems, population size, economic structure, culture and local heritage, etc. To some extent the characteristics of a locality determine its resilience to pressures from tourism. The size, the structure and dynamism of the local society, culture and economy can be significant factors, which influence the local ability to cope with pressures and impacts from tourism.

Tourism is the key driver of socio-economic progress through export revenues, the creation of jobs and enterprises, and infrastructure development. Globally, as an export category, tourism only ranks below fuels, chemicals and food. For many developing countries it is one of the main sources of foreign exchange income and the number one export category. In order to unleash the full potential of the Black Sea Region, the most important thing that is needed is to establish a trusted brand for travelers and providers to the region.

…….travel is more than the seeing of sights; it is a change that goes on, deep and permanent, in the ideas of living.
Chapter 11

Wine tourism can dissolve the borders in the Black Sea Region

Savina Nedyalkova-Rupelieva (Bulgaria), Chief expert, Tourism Policy Directorate, Ministry of Economy and Energy of Bulgaria

Abstract

The increasing people’s environmental awareness and the tourists’ demand for nature and authenticity are among the factors driving to the dissemination of a new concept of sustainable tourism: a form of tourism with a low environmental impact and with respect to the local communities.

Thus is evident that the tourism industry is faced with new challenges: consumers search for multi-optional offers and experiences which are delivered in an exciting but also comfortable and authentic atmosphere (Reiter, 2004; European Travel Commission 2006).

Wine tourism seems to be able to fulfil many of these new customer requirements and needs and therefore is emerging as an increasingly significant sector of both the wine and tourism industries.

It is believed that experiences in wine tourism can be characterised as “soft” attractions in a cross cultural context with a dominant emotional value. The wine tourism can be the focal point of a community’s tourism effort in a rural destination area, or complementary to urban attractions in city locations.

Keywords: Wine tourism, Wine routes, Sustainable development, Black Sea Region.

Wine tourism in Bulgaria – an alternative of the mass tourism

International tourism in Bulgaria has been characterised by an increase of the number of foreign tourists in recent years. Unfortunately this increased number of tourists in Bulgaria is outlined by high territory dependence and seasonal aspect – 70% of the activities are concentrated on a small territory of the country with high seasonal fluctuations – summer and winter being the most active.

Bulgaria has remarkable natural, cultural and historical resources for development of specialised types of tourism, which is a precondition for change in the image of the country as a mass tourism destination. The wine tourism is seen as such an opportunity which can be used to distribute tourism more evenly over the country, reducing both temporal and geographical seasonality.

The typical warm-hearted Bulgarian hospitality, along with the excellent taste of the Bulgarian wine and long traditional culture of wine making, create unique offer for complete tourist satisfaction.
Bulgaria is among a few countries in the world where the winemaking ascends to the highest antiquity. These traditions can be traced to the ancient Thracians, who considered wine to be not merely a drink, but a part of their religious rituals. Wine was a means for them to get in touch with their gods, the ancient Greek god Dionysus and his Thracian equivalent, Zagreus. The treasures of ancient Thrace attest to that ancient civilization’s wine production and consumption, and many of those treasures are vessels intended to hold wine.

Today, Bulgarian vineyards produce a wide variety of wines. There are both vast vineyards and small wine cellars serving fine local wines made from village grapevines. The hand-winemaking survived in some areas. The growers are gathering and selecting grapes by hand, and the finished product is kept only in oak casks. This technology yield most praiseworthy results.

Some of the country’s oldest and largest vineyards are located in the Northern region – in Ruse, Svishtov, Vidin, Lyaskovets, Suhindol and Pleven. The vines planted in these areas have protected geographical indication (PGI) Danubian Plain. Near Pleven, there is a unique wine museum in Bulgaria which offers a profound view into Thracian, Greek and Roman wine history and presents all major Bulgarian wines since 1912.

The Southern wine-growing region includes the central part of the Thracian lowland, as well as parts of the Sakar Mountain. These regions have developed some unique grape varieties, such as Mavrud and Melnik, which trace their origins to 5,000 years ago. The vines planted in these areas also have protected geographical indication (PGI) Thracian Lowlands. The major wine cellars offering these wines are in Asnovgrad, Haskovo, Brestovitsa, Stara Zagora and Lyubimets.

Black Sea Coastal (Eastern Region) has around 30% of the vineyards and includes three sub-regions: Northern sea coast, Internal sub-region and South sea coast. The conditions are perfect for growing white varieties of grape. The region is well-known for its white wines: Sauvignon Blanc, Chardonnay, Ugni Blanc, Dimyat, Traminer and Riesling. Most of the wine cellars in this region are in Varna, Pomorie, Burgas, Targovishte, Shumen, Khan Krum and Preslav.

To the south of the Balkan Mountains spreads the Sub-Balkan region with its two sub-regions: Eastern sub-region - includes the Sungurlure Valley which mainly grows “Red Misket” designated for the production of dry and semi-dry wines. The Western sub-region includes the Valley of Roses, where the unique cultural and historical monuments from the ancient Thracians along with the wine traditions of the region attract more and more tourists each year. The white grape varieties grown in the region are Misket and Muscat, and the red Kadarki and Cabernet Sauvignon.

Struma River Valley includes the southwestern parts of the country. It is not large in size, but it possesses some specific climatic features which are very similar to the Mediterranean regions. Along the valley of the Struma river a unique Bulgarian varietal “Broad Leaved Vine of Melnik” (Shiroka Melnishka) is cultivated for the production of dry and semi-dry wines. Cabernet Sauvignon, Merlot and Pamid varietals are also grown in the area. The local wines are characterized by full taste, with spicy southern tones. The largest wine cellars are in Damyanitsa, Sandanski, Blagoevgrad, Petrich, and the village of Harsovo.

Throughout the country, there are excellent opportunities for wine tourism. Many of the wine cellars have special wine tasting areas and restaurants. In the recent years therapeutic spa
procedures have included wine and grapes as part of the diet and the relaxation procedures and a number of spa centers, hotels and upscale wine cellars now offer this option.

**Bulgarian wine tourism SWOT analysis**

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<th>Strengths</th>
<th>Weaknesses</th>
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<td>- one of the oldest wine-growing regions in the world;</td>
<td>- generally low awareness of the competitive quality of Bulgarian wines;</td>
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<td>- traditional culture of wine making;</td>
<td>- only partial information on the actors of wine tourism;</td>
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<td>- wine regions, which can be used as brands;</td>
<td>- lack of reliable statistics;</td>
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<td>- protected geographical indication (PGI);</td>
<td>- lack of relevant skills;</td>
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<td>- thematic wine routes;</td>
<td>- tourism infrastructure;</td>
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<td>- wine festivals and specialized fairs and exhibitions throughout the year;</td>
<td>- accessibility;</td>
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<td>- tourism product suitable for year-round activity;</td>
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<td>- cross-industry benefit.</td>
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<th>Opportunities</th>
<th>Threats</th>
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<td>- encourage high-yield wine tourism;</td>
<td>- potential market shifts that could affect demand for this product;</td>
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<td>- promote alternative attractions and regions;</td>
<td>- external competition from other wine producing regions,</td>
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<td>- preserving rural atmosphere with attention to the design of wineries and</td>
<td>- wine regions become increasingly involved, or even dependent upon wine</td>
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<td>tourism infrastructure;</td>
<td>tourism;</td>
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<td>- increasing the wine selling volume with so called “cellar door sales”;</td>
<td>- conserving the natural resource base in wine regions;</td>
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<td>- entering new markets.</td>
<td>- changes to the ‘winescape’ (i.e. physical, as in land devoted to</td>
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<td>vineyards; social, such as overcrowding at wineries; and cultural,</td>
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<td>such as commercialisation).</td>
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**Danube Wine Route - an example for sustainable trans-national tourism product**

*Project “Cultural Routes in the Middle and Lower Danube Region: Roman Emperors Route and Danube Wine Route”*

The main aim of the Project is the promotion and development of cultural cross-border tourism in the Danube regions of Bulgaria, Croatia, Romania and Serbia. It responds to the fact that rich and unique cultural heritage of the Lower Danube region is still not recognized and properly utilized.

The Wine route, as a tourist product, can be classified as a special type of a cultural route. Major theme is the wine culture, around which wine tourism is developed: tourist learn about
the wine culture and tradition, visit the wineries and festivals, taste wines, or take an active part in the grape harvest, etc.

The Danube Wine Route is an amazing journey that encompasses 12 wine regions set along the banks of the Danube, crossing Bulgaria, Romania, Croatia and Serbia and taking travellers to undiscovered destinations including small towns and villages where the Danube’s history and traditions can still be felt. And good wine and tasty food was always a trademark of countries along the Danube.

Along the route viticulture is a real treasure that is over two thousand years old. The wines produced here were among the best of Europe in the 19th century. Today, many internationally recognized grape varieties competes with the traditional ones, which are proudly cultivated as unique symbols of regional identity. Red, white, or rosé wines and a growing list of international awards are the wine makers’ rewards for their great efforts along the Danube Wine Route.

**Wine tourism can dissolve the borders in the Black Sea Region**

Wine has served as a motivation for travelling in the Black Sea Region since the times of Ancient Greece and Rome. It has been an inspiration for many legends and mystic rituals in the past. All the Black Sea countries have a long and wide experience in wine making. The history of wine in the area goes back at least 6,000 years and there are several countries in this region who claim to be the birthplace of the wine.

Nowadays wine is becoming a significant dimension in promoting regional image and also become a focal point of tourist interest. In a globalized economy wine is traded internationally and along with the trading of wine goes the trading of brands and regional images.

The idea to reinforce the image and profile of the area through development of the common and coordinated tourism products, such as wine tourism and wine routes could be the starting point to fully utilize market potentials of the Black Sea Region.

At this point is essential to involve the key stakeholders, both from public and private sector. This will be an important step, since there are numerous locations, regions and SMEs with more or less different aims.

That is the reason why the common vision for tourism development in the Black Sea Region must encompass these major phases: creating common marketing strategy; productive utilization of resources; and strengthening the performance of the region as a tourism destination.
Chapter 12

Tourism in Greece: The Strategic Shifts Ahead

Dimitrios Rapidis (Greece), Strategic Analyst and Social Entrepreneur, founder of the non-profit think-tank BRIDGING EUROPE

Despite the persistent economic crisis and slowdown, Greece has achieved to increase the number of tourists having visited the country since 2010. In 2014 the number of visitors went beyond expectations, with over 17 million choosing Greece as their destination for vacation. Tourism is considered one of the most robust sectors of economic production in the country, a fact that has helped national economy grow since the 1960s. During the last 50 years, Greece has attracted millions of visitors. The natural beauty of the country along with the appealing climate conditions and the history of the country are the major factors for someone to visit Greece. Nonetheless the massive waves of visitors; it has not been capitalized effectively so far.

The Pertinent Weaknesses

In comparison to its main competitors in the Mediterranean Basin (i.e. Turkey, Italy, France, Spain), Greece is facing a deteriorating competitive position with limited access in attracting visitors from emerging markets (e.g. China; Russia, Brazil, India) as well as visitors that spend more money than the average visitor. Therefore, while the country has a unique and literally unseen beauty, commercial and brand strategy is rather unsuccessful. The major drawbacks of this strategy can be found in a number of sectors, from real estate planning, infrastructure and investment planning to high cost of services, and concern every part of the market chain.

In this respect, the Greek tourism market has several restrictions that prevent the diversification of holiday patterns in growing market segments, such as vacation homes, cruise embarkation ports, marinas, and integrated resorts. In addition, the cumbersome bureaucracy along with the volatile and unstable fiscal system and the growing tax evasion trends discourage investments and distort the trust of investors and visitors over the local market. Furthermore, the average flight cost both within the European Union (EU) and from outbound destinations is uncompetitively high. There are only few exemptions regarding low-cost air carriers, such as Ryanair, but such companies, while being successful and sharing a considerable part of the market pool, cannot cater medium-to-high spenders, that seek for exclusive services.

The Dazzling Opportunities

The major advantage for Greece is that the country has the potential to develop high-end services in year basis, and not only in seasonal basis, and yet with minimum coordinated endeavors. Greece has beautiful landscapes and can provide diversified options in almost every corner of the country. From winter skiing tourism in the northern parts of the country, autumn tourism in the beautiful landscapes of Thessaly, Epirus, and Thrace, to summer
tourism in the islands and the Peloponnese region. In addition to that, the most populated urban centers such as capital Athens, Thessaloniki, Volos, Patras, and Heraklion Crete, provide unlimited options and can cater different demands, from cultural events, to nightlife, a variety of exceptional culinary options, short excursions in the adjacent areas. Moreover, the physical landscape and diversification of the Greek land can ostensibly attract investments, maintaining and unveiling an added-value, especially when comparing to other surfeited or unstable markets and regions (i.e. Southern Italy, Minor Asia’s coastal area, Egypt).

Large-scale investments could generate new job opportunities in many sectors, from construction to services, administration, tech-driven positions, travel agencies, therefore reinvigoring local economies and increase the direct and indirect impact and share on national GDP and growth.

The Insidious Threats

There are the internal – domestic threats that can seriously damage the image of the country, the poor branding, and the weakened marketing strategies. Political decision-making can affect the broader strategy, mainly in terms of culture and media diplomacy, the amounts spent for targeted advertising, the positioning of the country in emerging markets with great potential, the bilateral relations with a given country. During the last decades, the Greek central policy on tourism was not well-organized, whereas there have been rumors for improper management of the available funds for advertising abroad. Similarly, the tensions between the political leadership and the relevant labor unions and associations in the past have many times caused paralysis in the entire chain of market, the travel agencies, the port agencies and the visitors.

Another domestic threat lies on the economic conditions and the labor market of the country. Given the sky-rocketed unemployment and the thirst for seasonal occupations, the job market in tourism has considerably thrived along with grey economy. In addition to that, there is also an increasing capacity gap of the workforce, as a growing number of labor lacks sufficient education and relevant skills.

Coming now to the external threats, the year 2014 has been amounted with regional turbulences, especially in the Eastern Mediterranean. The negative shifts with regards to the Cyprus problem, the interventionist behavior of Turkey in the exclusive economic zone of Cyprus, the vast waves of Syrian refugees, the imminent threat of the Islamic State, the growing tensions between EU and Russia, the ongoing unrest in North Africa.

Greece is situated in a geographical position where all issues mentioned affect the broader sense of stability, and possibly impede the perception of the country, and of the area, as a safe place for vacation, and in the long run, can discourage investments in tourism. Especially the crisis with Russia in reference to Ukraine is a hot debated issue in the EU, and to a considerable extent, the Greek government cannot do a lot as it is bound to the wider EU policy.
Recommendations

Greece can do much more both in terms of improving the domestic market and advancing its influence towards strengthening its place and that of the wider Black Sea Region as a sustainable destination for tourists and visitors.

In the domestic field, Greece has to redefine its commercial strategy and achieve greater penetration to both EU and emerging markets. The “sun and beach” campaign project has to be intensified and coupled with the quality upgrade of diversification options in order to attract higher-income segments of the visitors. In this respect, taxation should be lowered and the process simplified, bringing in more targeted and high-scale investments in infrastructure, integrated resorts, nautical tourism, and the cruise sector that could be further developed with the liberalization of the market.

Greece needs to improve transportation access and promote better connectivity with emerging and long-haul markets, while investing more in capabilities and know-how through the establishment of a tourism university degree that would be adjusted to the current technical expertise.

In terms of regional synergies, Greece has to strengthen bilateral partnership with Turkey and step into a new era of cooperation. The connection of both markets and the sharing of the benefits should be put forth, a fact that would inevitably solidify cooperation in the field of foreign policy and the bilateral issues. In a broader perspective, Greece should take the initiative to connect the domestic market and services with adjacent countries that show a great potential in the area of tourism, such as Russia and Azerbaijan. Sharing of knowledge, common campaigning, and facilitation of connectivity should be the priorities for the Greek leadership. In this respect, all parties involved should acknowledge the growing competition in the field of tourism and establish a common strategy that would increase the quality of services and the number of high-income segments of visitors from around the world.

The cultural assets of the Black Sea Region and the traditional ties between the states of the region should be further nourished under a common intra-national body or within the Organization of the Black Sea Economic Cooperation (BSEC) that would put ahead a concrete strategic plan with the participation of specialized communication and policy-making agencies from all the countries concerned. In this respect, sector tourism can be ignited, targeting the youth, students, entrepreneurs, and simple visitors that want to travel and explore the region. Information and campaigning is vital and it will certainly bring up effective outcomes.
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