

ECONOMIC SIGNIFICANCE OF TOURISM SECTOR IN BALKAN COUNTRIES AND AN ANALYSIS OF THE TOURISM RELATIONS BETWEEN TURKEY AND BALKAN COUNTRIES

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Abstract

The Balkan region which has been unstable up to 2000s now host leading markets that make progress and attract attention in global economy from an economic, political, geographical, historical and cultural perspective. Particularly the new reforms and legal arrangements introduced in the Balkan countries within the framework of harmonization efforts with the European Union contributed to the emergence of a new environment of stability and peace. Positive development is observed if the general economic performance of the Balkan countries is analyzed by sectors. According to the tourism data of the World Tourism Organization in 2011, tourism has become popular in recent years in Western Balkans; however, cross-border tourism has been in decline in many parts of the region due to the decrease in the spendable income. In addition, the tourists prefer developing countries; the change in this preference and the impact of the global economic crisis contributed to the rise of domestic and international tourism in the Balkan countries. Turkey's relations with the Balkans which appear to be extension of Turkey in the European continent have improved in a wide range of fields including economy, social affairs, culture and tourism. After introduction of project by Turkish Airlines, "Visa-Free Balkans," in 2011, the Turkish citizens became more interested in having vacation in the Balkans. It is also visible that Balkan countries have diversified their tourism options and that in addition, sea-sand and sun, they have other alternatives to offer including health tourism and faith tourism.

In this study, the necessary business enterprises on accommodation, traveling, transportation, food and catering in order to improve this potential and make it

tourism supply in Balkan tourism and other relevant countries in international tourism market will be examined first. Subsequent to the examination of the tourism supply, the demand for tourism in these countries will be evaluated in the second part and the profile of the visitors by foreign active-foreign passive and domestic tourism will be drawn. The purpose in these two sections is to examine the tourism sector which contributes extensively to the economic and social development of these countries by focusing on its economic dimension. In the third section, the tourism relations between Balkan states and Turkey which is a remarkable destination in global market and ranked among the first ten countries by number of visitors and international tourism revenues as evidenced by the World Tourism Organization's data through economic, social and cultural dimensions. In the concluding section, some recommendations will be made on how to improve tourism relations between Turkey and Balkan states which already enjoy close ties in economic and cultural spheres.

Keywords: *Balkan, Economy, Tourism, Turkey*

Introduction

In addition to enjoying a common culture and geography, the Balkan states and Turkey also hold similar goals as both seek membership in the European Union and become part of regional integration. Improvement of tourism in the Balkan geography and better use of the tourism potential in these countries is one of these common goals.

To this end, the purpose of the study is to identify the tourism potential in the Balkan region, to put emphasis upon the economic significance of tourism in the development of the region and to review the ties between Turkey and Balkan states in terms of tourism.

The data needed to attain the goals specified in the study has been retrieved via qualitative data collection method.

The countries in the Balkan Peninsula have been identified first; the literature and resources have been scanned in the Istanbul Chamber of Commerce (ICC) and Istanbul Chamber of Industry (ICI) as well as university libraries; the webpages of the relevant institutions have also been analyzed and the economy reports by the relevant ministries on the Balkan countries have been examined.

In the next stage, current data compiled by the World Tourism Organization and the World Travel and Tourism Council has been collected; and information from the national and international statistics institutions has been analyzed to create the relevant tables. The resources and statistical findings have been further interpreted.

Balkan Tourism in International Tourism Market

Tourism sector has been one of the most important and fastest-growing sectors in international economy since mid-20th Century thanks to the liberalization in the aftermath of 1980 and the globalization process which facilitated traveling abroad. In addition, it has also been observed in international tourism that competition has become severe in 1980s and 1990s, that growth has become sustainable and that tourism has been ranked first in the list of service sectors.

European continent is the most important tourism destination because 50 % of the tourists in international tourism market prefer European states. Despite economic uncertainty, the World Tourism Organization has estimated that the number of tourists in Europe will increase by 6 % in 2011 and reach to 504 million. In addition, it has also been stressed that the fastest-growing destinations are Asian-Pacific and the Middle East destinations (Tourism Highlights, UNWTO, 2012). The World Travel and Tourism Council notes that Europe has grown by 1.6 % in travel and tourism sector and 3.6 % in investments (WTTC, 2012).

Balkans, geographically close to Europe, have improved their domestic economic and political structures and benefited from the advantages offered by international institutions including the IMF, World Bank and NATO in opening up to the world as a result of the impacts of the domestic and external factors associated with the roles played by the US and the EU in early 2000s. In addition, they have made progress in the fields of economy, social issues, culture and tourism. Through this progress and change, the Balkan countries have become closer to the membership in NATO and the EU and started to represent point of intersection in the international economic setting (USAK 2012).

As part of their membership bid in the EU, the Balkan countries, focusing on the content of the EU Tourism Action Plan, have taken steps in such fields and issues as tourism and environment, rural tourism, cultural tourism, social tourism, youth tourism, vocational and professional training, promotion in third countries, and cross-border operations (İstanbullu Dinçer, 1997).

Tourism Supply and Tourism Demand In Balkan Countries

A review of the data and findings in Table 1 based on the tourism supply sources in Balkan area reveals that the bed capacity has partially increased. In addition to the rise of tourism enterprises in Balkan countries, emergence of diverse types of tourism based on new tourism tendencies has become influential in the types of businesses including emergence of spa facilities, cabins, certified accommodation facilities and farms.

In addition to accommodation enterprises, the number of catering, entertainment and relaxation facilities has also increased. The countries that realized the economic

impact of the growing tourism activities associated with the increase in the supply keep making investments.

Table 1: Accommodation Enterprises and Bedding Capacities In The Balkan Countries

Country	Accommodation Facilities		Bed Capacity	
	2010	2011	2010	2011
<u>Albania</u>	290	---	11793	---
<u>Bosnia-Herzegovina</u>	393	----	24,402	---
Bulgaria	3533	3540	287423	283641
Croatia	2 117	2 189	909 951	934 564
Macedonia, FYR	1551	---	69102	69732
<u>Romania</u>	4724	4612	---	---
Slovenia	1298	1307	117947	118817
<u>Serbia</u>	1833	---	27,392	---
Montenegro	---	310	---	157697
Kosovo	321	211	3624	2794
Greece	10.046	9648	850.365	---
Turkey	3524	---	882449	---

*provisional figure or data

Source: NSI, <http://www.nsi.bg>; Bosnia And Herzegovina Federal Office Of Statistics <http://www.fzs.ba>; Republic Of Macedonia State Statistical Office, <http://www.stat.gov.mk>; Croatian Bureau Of Statistics <http://www.dzs.hr>; Serbian the Ministry of Economy and Regional Development, <http://www.turizam.merr.gov.rs>; The Institute of Statistics (INSTAT), <http://www.instat.gov.al>; Statistical Office of Montenegro (MONSTAT), <http://www.monstat.org>; Statistical Office of the Republic of Serbia, <http://webrzs.stat.gov.rs>; Statistical Office of the Republic of Slovenia, <http://pxweb.stat.si>; Hellenic Statistical Authority (EL.STAT.), <http://www.statistics.gr>; National Institute Of Statistics-Romania, <http://www.insse.ro>; EUROSTAT, <http://epp.eurostat.ec.europa.eu>

Transportation network which plays significant role in the improvement of tourism in a region is not advanced enough in Balkan countries. The collapse of the Yugoslavia Federal Republic, wars, political and economic instabilities are among the factors that could explain the lack of proper transportation in Balkan countries. In terms of transportation infrastructure, quality and efficiency, Balkan countries lag behind the EU average (Türbedar, 2010).

Because it is a transit region for Turkey, the developments in transportation infrastructure of the Balkan region concerns Turkey. However, the transportation

sector has been improving thanks to the EU membership bid. This will further improve trade and promote further tourism activities between the regions and communities.

A review of the data presented on the Balkan tourism in Table 2 compiled based on the 2011 data of UNWTO reveals that the tourism activities have been on rise and that in addition to Turkey, Greece, Croatia and Bulgaria have made serious progress in international tourism movements.

A comparison between world tourism movements and the Balkan country data reveals that the Balkan states have received 68,257,000 out of 983 million tourists in the world; this represents 4.6 % growth. In terms of tourism revenues, the Balkan countries have received \$59,184 million out of \$1,030 billion (UNWTO, 2012). Kosovo, not included in this list, received 551,990 tourists whereas there were 578,349 outgoing tourists. The number of total visitors was 990,000 in 2007 where as it increased by 140,000 in 2008 and reached to 1.5 million in 2009 (T.C. Ekonomi Bakanlığı, 2012).

Table 2: Balkans International Tourist Arrivals and Tourism Receipts

Country	Arrivals (1000)			Revenues (US\$ million)		
	2010	2011*	Change %	2010	2011	Share %
<u>Albania</u>	2,347	---	---	1,626	1,628	0.6
<u>Bosnia-Herzegovina</u>	365	392	7.2	594	628	0.2
<u>Bulgaria</u>	6,047	6,324	5.4	3,637	3,967	1.4
<u>Croatia</u>	9,111	9,927	4.8	8,259	9,185	3.2
Yugoslav Republic of Macedonia	262	327	1.0	197	239	0.1
<u>Romania</u>	1,343	1,515	5.3	1,140	1,417	0.5
Slovenia	1,869	2,037	2.5	2,566	2,708	0.9
<u>Serbia</u>	683	764	5.8	798	992	0.3
Montenegro	1,088	1,201	4.2	660	777	0.3
Greece	15,007	16,427	0.6	12,742	14,623	5.1
Turkey	27,000	29,343	5.9	20,807	23,020	8.0
Total	65,212	68,257	---	53,026	59,184	---

*provisional figure or data.**No data found on Kosovo.

Source: Tourism Highlights, UNWTO, 2012.

Tourism demand in Balkan countries displays similarities because of geographical closeness and common culture. However, the tourism attractions and economic power of the countries also become effective.

Albania: Despite some ups and downs, the Albanian economy has been growing since 2007. Kosovo people represent 37 % of the foreign visitors in the country, followed by visitors from Macedonia and Montenegro. Statistics show that the 89 % of the visitors travel to this country for a vacation or visit for their friends. The remaining expresses that they travel for business purposes (T.C. Ekonomi Bakanlığı, 2012). In 2011 Travel & Tourism directly supported 51,000 jobs (5, 5% of total employment). Travel & Tourism investment in 2011 was 4.8% of total investment (WTTC, 2012).

Bosnia-Herzegovina: It receives visitors mainly from Croatia, Slovenia and Turkey (FZS, 2012). Most of the visitors travel to the country for seaside tourism whereas the demand for winter tourism, spa, cultural places, faith travels and eco-tourism has been on rise (İGEME, 2012). In 2011 Travel & Tourism directly supported 21,000 jobs (1,8% of total employment). Travel & Tourism investment in 2011 was BAM188.0mn, or 4,9% of total investment (WTTC, 2012).

Bulgaria: It mainly receives visitors from Germany and Greece and Romania; this is the case because Bulgaria became EU member on 1 January 2007 and opened up its borders to visitors from EU countries without asking visa. In addition, after introduction of a new visa regime, Bulgaria also receives growing number of visitors from Turkey, Serbia and Macedonia (T.C. Ekonomi Bakanlığı, 2012). The visitors express that they prefer Bulgaria for holidays, leisure, recreation, health and medical care, visiting friends and relatives, business and professionals, transport crew (UNWTO, 2012). In 2011 Travel & Tourism directly supported 101,000 jobs (3.3% of total employment). Travel & Tourism investment in 2011 was BGN893.3mn, or 6.1% of total investment (WTTC, 2012).

Croatia: Tourism is an important sector that plays role in the restructuring of the economy. 6 % of the people are employed in this sector. 95 % of the bed capacities are held in Adriatic facilities (T.C. Ekonomi Bakanlığı, 2012). Croatia mainly receives visitors from Germany, Slovenia and Italy (DZS, 2012). In 2011 Travel & Tourism directly supported 135,500 jobs (12.3% of total employment). Travel & Tourism investment in 2011 was HRK7, 700.1mn, or 11, 4% of total investment (WTTC, 2012).

Macedonia: Due to slow progress in privatization and domestic instability, the tourism potential is not effectively used in the country. But there is growing demand for cultural tourism, winter tourism and mountain tourism (İGEME, 2012). Macedonia mainly receives visitors from Greece, Turkey and Serbia (Republic Of Macedonia State Statistical Office, 2012). In 2011 Travel & Tourism directly supported 7,500 jobs (1, 2% of total employment). Travel & Tourism investment in 2011 was MKD2.3bn, or 1, 9% of total investment (WTTC, 2012).

Romania: Located at important crossroads in Europe, Romania attracts visitors thanks to its improved locational attractions including easy transportation via

railway land and airway. The visitors are particularly attracted to nature, mountain tourism, castles, Tuna Delta, Black Sea coast and spas, monasteries (T.C. Ekonomi Bakanlığı, 2012). In 2011 Travel & Tourism directly supported 184,500 jobs (2.2% of total employment). Travel & Tourism investment in 2011 was RON9.4bn, or 7.3% of total investment (WTTC, 2012).

Slovenia: with its historical and natural beauties, its coast along Adriatic Sea, skiing and golfing facilities, river cruises and spa opportunities, Slovenia is an important tourism destination (İGEME, 2012). Slovenia mainly receives visitors from Germany, Italy and Austria (Statistical Office of the Republic of Slovenia, 2012). In 2011 Travel & Tourism directly supported 33,000 jobs (3, 9% of total employment). Travel & Tourism investment in 2011 was EUR673.2mn, or 9, 9% of total investment (WTTC 2012).

Serbia: Tourism holds 3 % of share in the total GDP of the country. Serbia mainly receives visitors from the US, Montenegro, Bosnia-Herzegovina, Slovenia, Croatia, Germany and Italy; the total revenue in tourism activities was \$787 million. Half of the visitors prefer visiting Belgrade which they describe as a cosmopolitan capital city. Demand for tourism is affected by other attractions in the region including Danube trips, culture tourism, health tourism (T.C. Ekonomi Bakanlığı, 2012). In 2011 Travel & Tourism directly supported 26,000 jobs (1, 5% of total employment). Travel & Tourism investment in 2011 was RSD18.6bn, or 2, 5% of total investment (WTTC, 2012).

Montenegro: Tourism holds a special place for the economy. According to WTTC 2010 report, the total share of the tourism services in the gross domestic product will become 26 % by 2020. 30,000, representing 17.4 % of the total workforce, were employed in tourism sector in 2010. (WTTC, 2012). The country is mostly preferred for seaside tourism whereas the inner parts are preferred for winter tourism (İGEME, 2012). In 2011 Travel & Tourism directly supported 11,000 jobs (6.5% of total employment). Travel & Tourism investment in 2011 was EUR164.6mn, or 23.6% of total investment (WTTC, 2012).

Greece: Surrounded by sea in three sides, Greece is one of the 20 countries that attract the greatest number of visitors in the world. The number of tourists has sharply declined by 20 % in 2009 to 14.9 million. The direct contribution of the tourism revenues to economy is 7.5 % whereas this contribution becomes 16.5 % thanks to employment opportunities. The majority of the visitors to this country (95 %) are from Europe. Greece mainly receives visitors from Britain, Germany, Italy, France and the Netherlands; the total share of the visitors from these countries is around 60 % (T.C. Ekonomi Bakanlığı, 2012). In 2011 Travel & Tourism directly supported 349,500 jobs (8, 5% of total employment). Travel & Tourism investment in 2011 was EUR4.0bn, or 14, 0% of total investment (WTTC, 2012).

Kosovo: It holds great potential for winter tourism. It has a strong potential for skiing, eco-tourism, paragliding, biking and rock-climbing (T.C. Ekonomi

Bakanlığı, 2012). Visitors from Albania, US and Turkey mostly prefer Kosovo as their tourism destination.

For data in Table 3, 133 countries have been examined for 2009 index and 139 for the 2011 index. The findings reveal that with the exception of Greece, all Balkan countries have become more popular as tourism destinations in the world.

Table 3: Travel and Tourism Index-2011

Country	RANK		SCORE
	2009	2011	
<u>Albania</u>	90	71	4.01
<u>Bosnia-Herzegovina</u>	107	97	3.63
Bulgaria	50	48	4.39
<u>Croatia</u>	34	34	4.61
Macedonia, FYR	80	76	3.96
<u>Romania</u>	66	63	4.17
<u>Slovenia</u>	35	33	4.64
<u>Serbia</u>	88	82	3.85
<u>Montenegro</u>	52	36	4.56
Greece	24	29	4.78
Turkey	56	50	4.37

*No data found on Kosovo. **Source:** Travel and Tourism Competitiveness Report-2011, World Economic Forum, 2012.

Tourism Relations Between Turkey and Balkan Countries

Turkey and Balkan countries share the same geography and common history as well as culture. For this reason, Balkan region is important to Turkey not only because of its geographic, political and economic closeness and ties but also because of historical, cultural and human resources. The four main issues and pillars in Turkey's Balkan policies shaped by the main principles of regional attention and comprehensiveness include high level political dialog, security for everybody, maximum economic integration and preservation of the multi-ethnic, multicultural and multi-religious social structures. The major political goals include creating spheres of common interests between the countries in the region, facilitating regional cooperation and attaining comprehensive regional integration (T.C. Dışişleri Bakanlığı, 2012). To ensure regional integration, it is essential to promote economic development and stability in the region. The political and economic instruments concluded between Turkey and Balkan countries in 1990s including Trade and Economic Cooperation Agreement, Free Trade Agreement, Promotion of

Investments Agreement have improved the relations between Turkey and Balkan states.

The agreements between Turkey and Balkan countries directly or indirectly affect the tourism sector. For instance, the participants pledged to make a total amount of \$1.9 billion in form of donation to Kosovo in a conference held in Brussels on 12 July 2008. 30 million euros of this amount is sponsored by the Turkish Cooperation and Development Agency (TİKA) (T. C. Ekonomi Bakanlığı, 2012). This cooperation will ensure economic development of Kosovo and promote economic prosperity in the region. And this will eventually influence tourism sector in the region.

The cooperation between Turkey and Balkan countries has been furthered by an agreement between Turkey and Albania concluded on 29 January 1987 which has been renewed on 11 November 1992 in Ankara (TC Ekonomi Bakanlığı, 2012). The Tourism Cooperation Agreement concluded between Turkey and Macedonia in 1993 is another visible example of cooperation. In addition, it has also been observed that there has been visible rise in the tourism investments by the Turkish businessmen. For instance, Dedeman Hotels have entered the Bulgarian market by assuming contractor job of the 4-star Princess Hotels in Sofia and Plovdiv. Dedeman wants to make them 5-star by renovating them and subsequently operate these hotels (İGEME, 2012).

In terms of easier access and transportation, a key part for the tourism destinations, the Turkish Airlines have concluded deals with the relevant actors. For instance, there are direct flights every day between Istanbul and Zagreb; number of joint flights with Croatian Airways has been increased from 3 to 10 in a week. This enables greater number of tourists to have access to tourism destinations in the region.

It is observed that a review of the UNWTO and WTTC data (Table 2) reveals that the tourism movements and activities in Turkey, ranked among top ten countries in world tourism and 50th among 139 countries in Travel and Tourism Index (Table 3), have become more important and attractive. This creates further opportunities for cooperation with Balkan countries which are located in the same geography. By cooperation between Turkey and Balkan states, more people will have the opportunity to travel to these countries in the region and have their vacations in Turkey.

Conclusion

Balkan region which has been a venue of conflicts throughout history currently represents a promising market that holds great potential in terms of tourism opportunities. These countries which have moved to a free market economy in the aftermath of the regime changes in 1990s have become fertile grounds for all sorts

of economic activities by virtue of rapid reforms. To this end, the countries in the region have minimized the red-tape procedures, completed their structural and institutional operations and regulated their legal structures and legislations. In addition, they have concluded a number of regional, international and bilateral free trade agreements for the purpose of becoming full members in the EU.

There are a number of steps to be taken for the proper use of this potential and its transformation into material wealth because the countries in the region fall behind the European countries in terms of development and they have to take strong legal, political and economic decisions in order to become more influential in global economy. At this point, the previous stories and cases of economic transformation, the opportunities used and the ongoing crises are illustrative for the emergent economies in the region. Balkan region holds a special place in the current world where the economic center of gravity has shifted; for this reason, the economic stability in the region concerns a broader geography which also includes Turkey. The decision makers of the countries in the region operating in tourism sector need to draft tourism and investment policies and take rapid steps in security, transportation, infrastructure, service and education issues. The state of security, transportation infrastructure and transport tools, central and local administration services, number and quality of secondary and higher education institutions on tourism, state of catering institutions, quality and capacities of the accommodation facilities, travel agency and tour operator services appear to be the fertile areas for cooperation between the countries in the region. Marketing activities and promotions on national and international level that will be held with the participation of the actors of tourism sector and other relevant institutions, as well as governments, local administrations and civil society organizations in order to preserve the tourism assets and raise their image in domestic and international arena, and cooperation activities based on regional synergy will be influential in the promotion of the image of the countries in the region.

The implementation of these effective cooperation activities and their sustainability could be ensured via identification of common goals and targets agreed by all Balkan countries. Rumeli Balkan Federation, all Balkan associations and civil society organizations, institutions focusing on Balkan studies, and other civil society organizations like Turkish Cooperation and Coordination Agency could take joint action and create a Balkan Economic Cooperation organization under Turkey's leadership. A Balkan Tourism Committee could be set up within this organization to pursue studies on the drafting of long term tourism strategies and policies towards Balkan countries. Balkan Tourism Institutes could be established at the universities. An international Balkan tourism association could also be set up to administer the tourism relations between Turkey and Balkan states. The observation of common historical and cultural ties could be paid attention in the drafting of the tourism policies vis-à-vis the Balkan states. Secondly, the Turkish and Ottoman artifacts in Balkan states could be taken under protection; they could be used for tourism purposes and tours could be identified for the visitors who would travel to these countries to see these artifacts. Cooperation projects could be devised and planned

under bilateral agreements between the relevant states or by independent entrepreneurs to identify new types of tourism and to promote these new types. Within sustainable tourism principles, investment and support could be attracted from the international tourism organizations and international financial institutions to promote alternative tourism types (For instance, joint tourism cooperation between Greece and Turkey). In parallel to the EU tourism policies, fairs, exhibitions and festivals should be held to strengthen cultural ties between the people. For instance, as done by the EU in 1990, Balkan Youth Tourism Year could be declared to reinforce brotherhood ties between the young people. Considering that tourism could serve a passport of peace, generation of projects that would eliminate current turmoil and instability in the region should be the main goal of the tourism policies that would be drafted in the Balkan region.

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