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**CULTURAL, EDUCATIONAL AND SOCIAL AFFAIRS COMMITTEE**

**REPORT\***

**“Current and Future Perspectives in the Development of Tourism in the BSEC  
Region”**

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## **I. INTRODUCTION**

1. During the last decade, the tourism sector has experienced unprecedented growth and has become one of the fastest growing economic sectors in the world. At the same time, it represents one of the main income sources for many developing countries, which sometimes equals or even surpasses that of oil exports, food products or automobiles.

2. The direct economic contribution of travel and tourism to the global economy amounted to approximately 2.57 trillion U.S. dollars in 2017. The tourism sector is one of the world's largest and most diverse industries, accounting for up to 5% of the global GDP and providing more than 25% of the total global service trade.

3. The tourism industry is also one of the largest provider of employment in the world. Tourism continues to be one of the best positioned economic sectors to drive inclusive socio-economic growth, provide sustainable livelihoods, foster peace and understanding and help to protect the environment. However, the sector is facing several major challenges: safety and security concerns, the technological revolution and the necessity to follow a course toward sustainable development.

4. Despite the challenges, the growth prospects for the international tourism in the BSEC destinations are very positive overall. Tourism is, undoubtedly, among the greatest assets of the region, that should be utilized not only for the sustainable development of the national economies and for the promotion of the regional cooperation, but also for shaping this area as an attractive tourism destination. A better coordination of the legal authorities in the tourism field among the Member States can help strengthen the cooperation among the countries and make of the tourism one of the most profitable sectors and a driver of socio-economic development in the BSEC Region.

5. Given that the wider Black Sea Region constitutes the geographical bridge between Europe and Asia, the whole region could be promoted as one of the leading tourism destinations. The Black Sea countries possess remarkable environmental, natural and cultural diversity as well as a rich historical and architectural heritage, which attract travellers from all over the world.

6. According to the UNWTO data for 2017, the tourism in the BSEC Region is growing steadily: the BSEC Member States welcomed 129 million of international tourist arrivals, which constitutes 10% of the world's total or 19% of the Europe's arrivals. The BSEC sector earned 66 billion U.S dollars in international tourism receipt, an estimated 5% of the global receipts. The Region growth rate as a whole, for 2017, in comparison with 2016, was 11.9 % (while worldwide, it was 6.8 %).

7. Realizing the above-mentioned figures, tourism protrudes not only as a great chance for regional sustainable development, but also as a motivation for closer regional cooperation in every field, such as culture, environment, transport and youth. In particular, in the Summit Declaration of the BSEC, in 1992, tourism is included in the key areas for further development and cooperation.

8. While the Joint Varna Declaration of the Ministers in charge of Tourism of the Member States of the BSEC, adopted by the Ministers of Tourism in June 2018, in Varna, determines the Member States "to work together in the framework of the BSEC to strengthen and bolster tourism cooperation among the BSEC Member States, as it can help boost tourism flows between destinations to make sustainable tourism one of the major drivers of socio-economic development in the BSEC Region".

9. The current Report and Recommendation benefited from the contributions of the national delegations of the Republic of Azerbaijan, the Republic of Bulgaria, Georgia, the Hellenic Republic, the Republic of Moldova, Romania, the Russian Federation, the Republic of Serbia, the Republic of Turkey and Ukraine. Reference materials used for the preparation of the Report were obtained by the International Secretariat, through the Internet and the BSEC Permis.

## **II. THE BSEC REGION AND THE WORLD TOURISM ORGANIZATION**

10. The World Tourism Organization (UNWTO) is the United Nations Agency responsible for the promotion of responsible, sustainable and universally accessible tourism. As a leading international organization in the field of tourism, the UNWTO promotes tourism as a driver of economic growth, inclusive development and environmental sustainability and offers leadership and support to the sector in advancing knowledge and tourism policies worldwide.

11. The UNWTO encourages the implementation of the Global Code of Ethics for Tourism, to maximize the socio-economic contribution of the tourism while minimizing its possible negative impacts, and is committed to promote the tourism as an instrument for achieving the Sustainable Development Goals (SDGs). An intergovernmental organization, the UNWTO has 158 Member States, 6 Territories, 2 Permanent Observers and over 500 Affiliate Members.

12. In 2014, the BSEC welcomed the World Tourism Organization (UNWTO) as one of its Sectoral Dialogue Partners, while a comprehensive Memorandum of Understanding (MOU) between the two Organizations was signed during the same year. The objective of the MoU is the enhancement of cooperation in the field of tourism, which can be pursued by creating and implementing common regional projects, aiming at raising the visibility of the Black Sea Region as a tourism destination worldwide.

13. During the last BSEC Working Group in Tourism in Varna (June 2018), it was discussed the extension of the extraordinary cooperation with the UNWTO on a number of projects that are underway or in the pipeline, such as the UNWTO Silk Road Programme. It was also considered the preparation of the International Conference on attracting Cruise Tourism in the Black Sea and in the Eastern Mediterranean, which will be co-organized in Istanbul, in early 2019, by the BSEC, the UNWTO and the Ministry of Culture and Tourism of Turkey. The participants agreed on holding Seminars for attracting more Chinese and Indian tourists to the BSEC Region. These seminars will be implemented in early 2019, by the UNWTO experts.

14. All the BSEC countries are members of the UNWTO. Eight are located within the UNWTO subregion of Central and Eastern Europe (Armenia, Azerbaijan, Bulgaria, Georgia, Republic of Moldova, Romania, Russian Federation and Ukraine) and four are within the sub-region of Southern and Mediterranean Europe: Albania, Greece, Serbia and Turkey.

## **III. TOURISM IN THE BSEC REGION**

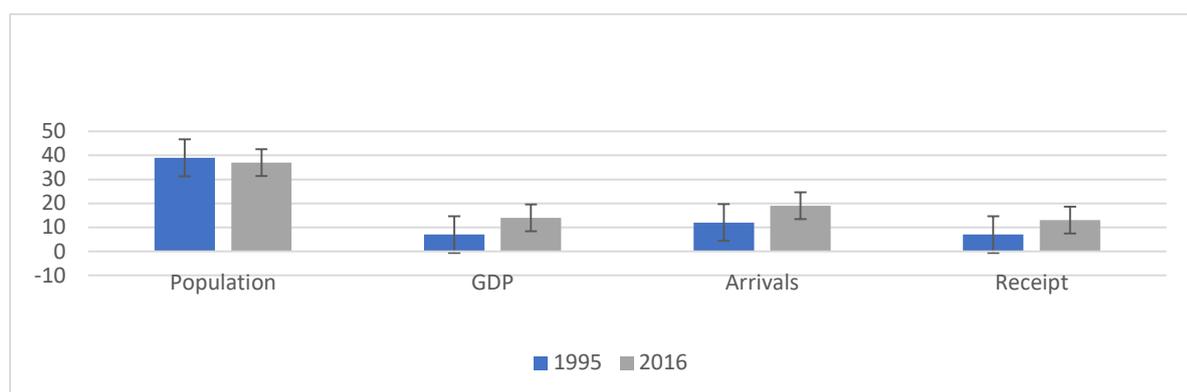
### **A. Socio-economic environment**

15. The Black Sea Region is the second largest source of oil and natural gas in the world after the Persian Gulf Region, with significant mineral, metal and other natural resources. Being on the crossroad of Asia and Europe, it has become a major transport and energy corridor. The development and income levels vary considerably across the BSEC economies and the average

GDP per capita in the Region is 8,360 US Dollars, which is somewhat below the world average of 10,230 US Dollars, though it has experienced much faster growth in the recent past.

16. The GDP per capita has more than tripled in the last two decades, from 2,420 US Dollars in 1995 to 8,360 US Dollars in 2016. In this period, the BSEC Region’s share in the economy of Europe has doubled, from 7% of Europe’s GDP in 1995 to 14% in 2016. Its share of European tourism has also increased, from 12% to 19% of international arrivals and from 7% to 13% of international tourism receipts, in US dollar terms.

***BSEC Member States Socio-economic Data***  
***1995-2016***



**B. Tourism trends in the BSEC Region**

17. Tourism is one of the 18 areas of cooperation among the BSEC Member States, which constantly gains popularity and priority. In recent decades, the pace of tourism has accelerated, becoming a world's leading socio-economic sector, also being one of the most important sources of income and employment.

18. In line with the world trends, the tourism industry maintains its growth rate in the future, regardless of the current challenges for the economy and security in Europe and the world. The forecasts of the World Tourism Organization (WTO) notes the continuation of the trend of growth of travel for tourism, and the average annual growth of world tourism is expected to be 3.8% in the period up to 2020.

19. The BSEC Member States represent a market of 333 million consumers and a combined GDP of 2.8 trillion U.S. dollars (as of 2016), accounting for 14% of Europe’s economy and 4% of the world’s one. The economic and income levels vary substantially across the Region.

20. The BSEC Region comprises both established and emerging destinations of different sizes and varying degrees of infrastructure development, connectivity, promotion and brand strength. Tourism is a major economic pillar in some mature destinations, while in emerging destinations the potential for growth is still comparatively large.

21. In the period from 1995 to 2016, international tourist arrivals in the BSEC Region increased by an average of 6% per year, faster than the world rate, of 4%. International tourists have

more than tripled in these two decades, from 35 million in 1995 to 115 million in 2016, benefiting from both mature and emerging destinations. Arrivals peaked in 2013 at 129 million.

22. In 2016, the BSEC destinations earned US\$ 57 billion (EUR 51 bn) in international tourism receipts, from visitor expenditure on accommodation, food and beverage, local transportation, entertainment and shopping. This represents 13% of the European tourism earnings and an estimated 5% of the world receipts. The proportion of global receipts is somewhat lower than that of the world arrivals (9%), partly because the purpose of much of this travel is to visit friends and relatives (VFR), which usually entails lower spending compared to leisure or business travel.

23. Of the tourism receipts earned by the BSEC destinations, 64% corresponds to Southern and Mediterranean Europe, mostly the larger and mature destinations of Turkey and Greece, and 36% to Central and Eastern Europe, much of which, to the Russian Federation. Turkey (US\$ 19 billion) is the top earner of the tourism receipts in the BSEC Region, followed by Greece (US\$ 15 billion), the Russian Federation (US\$ 8 billion) and Bulgaria (US\$ 4 billion).

***Total contribution of Tourism to GDP and Employment, Tourism investments  
in the BSEC Member States (2017)***

BSEC Member State	Total contribution of Tourism to GDP (%)	Total contribution of Tourism to Employment	Share in total employment	Tourism investment (USD)	Share in total investment
Albania	26%	292 000 jobs	24. %	269million	8 %
Armenia	16%	160 000 jobs	13 %	108 million	5 %
Azerbaijan	15%	610 000 jobs	15 %	280 million	3 %
Bulgaria	12 %	336 000 jobs	11 %	840 million	7 %
Georgia	31 %	480 000 jobs	27 %	175 million	4 %
Greece	20 %	930 000 jobs	24 %	3, 5 billion	15%
Moldova	3 %	34 000 jobs	3 %	46 million	2 %
Romania	5 %	520 000 jobs	6%	3,8 million	8%
Russia	5 %	3,2 mln jobs	4,5 %	6,8 billion	2 %
Serbia	6.7%	96 000 jobs	5 %	299 million	4 %
Turkey	11 %	2 mln jobs	7,4 %	20 billion	8 %
Ukraine	5.7 %	850 000 jobs	5%	291 million	2 %

24. The total contribution of tourism to the employment of the BSEC Member States in 2017, amounted to more than 9.5 million jobs. The tourism investments have a significant share in the economies of the countries in the wider Black Sea Region, which somehow involves the active participation of the business sector as well.

**C. Cooperation in the framework of the BSEC**

25. The legal basis for cooperation among the BSEC Member States in all the areas of cooperation is the BSEC Charter, signed in 1992 and entered into force in 1999. The Working Group (WG) on cooperation in Tourism was established in 1994 by the relevant decision of the BSEC Council. Apart from the decisions of the WG, until now, 6 Ministerial meetings on Tourism and one Joint Conference of Ministers of Culture and Tourism were held, adopting Ministerial Joint Declarations.

26. Since 1994 and through the activities of its Working Group on Cooperation in Tourism, which meets almost twice per year under the supervision of the BSEC Ministers in charge of Tourism, the Organization aims at developing and enhancing the cooperation among its Member States and beyond, in the crucial field of Tourism.

27. In the absence, for two years, of a Country Coordinator of the Working Group on Cooperation in Tourism, Bulgaria took on the responsibility to fulfill this role in July 2016. In these two years, the Ministry of Tourism held three meetings of the working group. During this period, the country coordinator focused on the mechanisms and ways of achieving the strategic competitiveness of the tourism sector in the region, by adopting a common approach to its development, introducing innovation, consolidating the image of the Black Sea as a tourist brand for the visitors from the closer European market and from the distant markets with increasing importance, such as China, South Korea, Japan, the United States and others.

28. During the mandate of Bulgaria as Coordinator of the Working Group on Cooperation in Tourism, the cooperation of the Organization with the EU and the World Tourism Organization was raised to a new level. An example of this is the interaction of the BSEC with the World Tourism Organization, which united their efforts with regard to the UNWTO Program "Silk Road". Ten of the twelve BSEC Member States are already participating in the Programme, which is an excellent condition for ensuring synergies, both among them and between the two organizations.

29. The Working Group continued the practice of exchanging information regarding the tourism national strategies and the possible joint projects, in particular, on the development of gastronomy and wine tourism in the Black Sea Region, the development of the University Environment Integration for Specialist Training in the Tourism Sphere in the Black Sea Region, the development of cultural routes/cultural tourism projects, the development of the film-induced tourism, of cruise tourism etc.

30. On the 14th June 2018, in Varna, as a concluding event of Bulgaria's mandate as a Country Coordinator of the BSEC Working Group on Cooperation in Tourism, a Meeting of the Ministers in Charge of Tourism of the BSEC Member States was organized, where a Joint Varna Declaration of the Ministers in Charge of Tourism of the BSEC Member States was adopted. The attending representatives of the BSEC Member States declared their intention to work together in order to strengthen and bolster the tourism cooperation among the BSEC Member States.

#### *Multilateral Cooperation in the BSEC Region: State of Affairs and Ongoing Projects*

31. Cultural Routes – Cultural Port of the Black Sea: The key priorities for the activity of the BSEC WG on Culture, is the establishment of a network of experts in order to promote the research on the common cultural heritage of the Black Sea Region. The Joint Declaration of the Conference of the Ministers in charge of Culture and Tourism (Sochi, 23 June 2016) *inter alia*, encouraged the implementation of the Cultural tourism/cultural routes projects, in the

Black Sea Region. Both the PABSEC and the BSEC PERMIS recommend that the Parliaments and the governments of the BSEC Member States should encourage the implementation of the Cultural Routes Projects in the Black Sea Region and, in this context, to support the establishment of an institution called “the Cultural Port of the Black Sea”.

32. Silk Road Projects: The Silk Road Programme is a large project under the auspices of the United Nations World Tourism Organization (UNWTO) and the UNESCO. The BSEC was involved in a series of meetings organized by the UNWTO. At those meetings, emphasis was primarily laid on the tourism sphere, but a number of entities participating in the events have drawn the attention on its cultural side as well. Within the framework of developing such transnational projects among the BSEC Member States, the Ministry of Tourism of the Hellenic Republic submitted a concept proposal themed “Bazaar – Agora: Experiencing traditional markets along the Silk Road Markets of the BSEC Countries”. The scope of the aforementioned concept proposal is to create an alternative way to experience Silk Road destinations, focusing on the traditional markets, as an entry point to the cities and as a means of understanding and experiencing the local heritage, culture and gastronomy.

33. Facility for Blue Growth in the Black Sea: the participation of the BSEC PERMIS to the Steering Committee of the "Facility for Blue Growth in the Black Sea" gives the opportunity to the BSEC to submit concrete project proposals, and reflects an upgraded cooperation with the European Commission, in the context of an updated Black Sea Synergy cooperation.

34. Black Sea Project Promotion Facility: Aiming at improving the investment access for small and medium-sized businesses in the Black Sea Region, the Russian Federation proposed, in July 2016, to create the Black Sea Project Promotion Facility (BSPFF) providing an initial contribution of USD 1,000,000. The Facility will finance technical assistance services related to the preparation of feasibility studies, business plans, due diligence analysis, creation of networks or partnerships for activities mostly related to energy efficiency and renewables, environmentally friendly technologies, infrastructure, trade exchanges, and knowledge-sharing. The Facility is open to contributions from other donor entities or countries.

35. Another ongoing initiative on the BSEC Agenda refers to the collection of data and the promotion of gastronomy and the establishment of the brand “Black Sea Cuisine”. During the last BSEC WG in Tourism, it was agreed that experts and professionals from interested Member States will formulate, as soon as possible, a relevant project proposal, which will be submitted to the Steering Committee of the Black Sea Project Promotion Facility, for adequate funding.

36. Concerning the Film-induced Tourism, an item lingering for a long time on the BSEC Agenda, the formulation of a project proposal has to be submitted to the same Steering Committee for funding. The BSEC Member States, together with other eligible partners, are called for Proposals for a project in order to develop regional, small-scale cruising “routes” in the Black Sea, by focusing on the mapping of local cultural assets and values across all coastal destinations, a project worth 400,000 Euros.

37. On the 30th December 2016, the Ministry of Tourism of the Republic of Bulgaria organized jointly with the UNWTO, the first of its kind International Congress on World Civilizations and Creative Tourism. The Congress was an excellent platform and unique opportunity for the public and private tourism stakeholders to present and share views, experiences and good practices in developing strategies that encourage and facilitate new and innovative forms of cultural tourism.

38. On the 13th February 2018, the Ministry of Tourism of the Republic of Bulgaria organized a High-level Meeting of the Ministers of Tourism of the EU Member States - Tourism and Economic Growth. This was the main event in the field of tourism during the Bulgarian Presidency of the Council of EU. The Ministerial Meeting focused on the exchange of constructive ideas and proposals for the development of the tourism sector and advanced cooperation in the field, highlighting the role of the tourism industry as a sustainable factor for economic growth, regional integration and peace.

39. The outcome of the meeting of the Ministers of Transport in the BSEC Member States, held on 1 June 2016 in Sochi, was the adoption of the "Sochi Joint Declaration on Prospects of Cooperation in the Field of Transport in the BSEC Region". The summit addressed the issue of the relationship between the transport and the tourism industries in the BSEC Region as well as the prospects for the development of transport cooperation in the Black Sea Region, carrying out activities to promote the tourism opportunities of partner countries, in order to increase the tourism exchange among the countries, through the development of the transport infrastructure in the region.

#### **D. Opportunities for enhancing cooperation in the field of tourism between the BSEC Member States**

40. According to the UNWTO, in an era of strong competition, the BSEC Member States can maximize their valuable cultural and environmental resources by investing in the development, by creating, promoting and marketing new tourism packages and multi-destination tourism products and routes. This would contribute to the increase of tourist flows within the region and from outside, both neighbouring and long-haul source markets. New multi-destination products should be focused on experiences rather than places. Close collaboration is the key to boost cruise tourism, for instance, in the Black Sea and the Eastern Mediterranean.

41. The BSEC Region comprises 12 countries with different levels of tourism development and a very diverse offer. It is important to explore the possibilities for a future cooperation, particularly by exchanging best practices and sharing experiences on key aspects of travel and tourism among the different countries, e.g. from the more mature destinations to emerging ones. Considering the current technology advances and the rise of digital tourism, modern marketing tools such as social media and mobile technologies could be used to promote the BSEC Region as a unique multi-destination area worldwide.

42. It is important to foster closer regional cooperation in the field in order to produce a mutually beneficial outcome that will promote competitiveness at regional and international levels. Information sharing, working groups and training sessions for the professionals and the entrepreneurs should be included in a short term plan of action, as a first step to a further development of the sector.

43. In order to further promote the countries of the Black Sea Region on faraway markets, it is vital to develop bilateral and cross border thematic tourist products, involving the BSEC Member States. To implement the aforementioned initiatives, it would be beneficial to attract tour operators of the BSEC countries to promote appropriate tourist products. Herewith, it is desirable to share information and best practices regarding the development of tourism and to promote specific tourist products in the BSEC member states, such as: Gastronomy and Wine Tourism, Film-induced Tourism, Balneology, Wellness and Spa Tourism, Maritime, Nautical and Cruise Tourism, Cultural routes/cultural tourism projects, Silk Road Programme.

44. It is important to join efforts in order to strengthen connectivity among the BSEC Member States and other markets, by air, land and sea, highlighting the importance of a closer coordination between tourism and transport policies. Supportive policies aiming at easing visas procedures in the BSEC Region can greatly contribute to stimulate travel demand and to create jobs. The BSEC Member States have made major progress in visa facilitation over the past years. However, further actions should be undertaken in this field in order to increase international tourist arrivals and expenditure.

### **The situation in the BSEC Member States**

45. Based on its potential in tourism sphere, the government of *the Republic of Azerbaijan* considers tourism as a priority area and includes it in a number of development programmes and plans. Tourism has become one of the priority areas, important political and economic decisions have been taken in this area. Preparatory work has been carried out in the field of training, improvement of the investment climate, infrastructure development, facilitation of border crossing procedures, etc. In order to develop the tourism, the National Bureau on Promotion of tourism has been created in 2016, and at the beginning of this year, the State agency on Tourism (which is a central body of executive power) has been established, whose task is to achieve the state policy in this area. During the first half of this year, the number of foreign citizens visiting the country increased by 10%, in comparison with the same period of the previous year. New hotels, roads, recreation areas and recreation centers have been built. Hostels have been reconstructed, new personnel has been prepared, the communication and marketing plan of Baku City has been formed and tourist brands of Baku and Azerbaijan have been developed. In general, new tourist products and services have been developed and created. It should be noted that the intergovernmental agreement on "Cooperation in the field of tourism" between the Republic of Azerbaijan and more than 30 countries, which are successful in tourism, including the 8 BSEC Member Countries, was signed. The Republic of Azerbaijan attaches special importance to the cooperation within the framework of the BSEC and intends to continue to have an active participation in the organization in all the directions, including the sphere of tourism.

46. *The Republic of Bulgaria* is known as a "close" and accessible tourist destination, offering a sense of stability and reliability. The country's membership in the European Union contributed to the development of the tourist market, facilitating the free movement of people, capital, goods, services and innovations. Bulgaria has a rich tourism potential, based on a combination of beautiful and diverse nature, excellent climate conditions, diverse cultural and historical heritage, delicious food and excellent wine, hospitality and geographical proximity to the main markets, such as the countries of the European Union, the Black Sea Region, Russia and Asia. The country provides different tourist products, which attracts the attention of different target groups, offering good quality for reasonable price. In the first half of 2018, the number of foreign tourists in Bulgaria, amounted 3.6 million, which increased by 8.9%, in comparison with the same period of 2017. In 2017, the total number of of foreigners' tourist visits in Bulgaria, reached 8.8 million, which is by 7.6% more, compared to 2016. From the BSEC Member States, Greece occupies the first place (more than 1 157 622 tourist visits in Bulgaria), followed by Romania (1 139 189), Turkey (636 046), Russia (557 915), Serbia (394 162), Ukraine (305 486), Moldova (208 594), Albania (34 033), Georgia (14 328), Armenia (5930) and Azerbaijan (5720).

47. In 2017, *Georgia* received 7.9 million visits of international travelers. Notably, alongside the numbers, the diversity of visitors has also expanded. The development of tourism is prioritized at all levels of the Government. Accordingly, Georgia strives to become a four-

season destination and places particular emphasis on the following activities: development of tourist infrastructure; travel facilities; country promotion; service quality improvement; creation of new tourist products. The Georgian National Tourism Administration, the World Bank Group, and the consulting company, called “Solimar International” have developed - “Georgia Tourism Strategy 2025”, which clearly outlines the vision for the development of the industry for the upcoming years. According to the Strategy, by 2025, Georgia will receive over 11 million international arrivals. Georgia aims to further diversify tourism markets and increase the share of travelers from Europe, Asia and other regions. Furthermore, the Government of Georgia aims to uphold sustainable principles of development and one of the eight strategic objectives highlighted within the strategy is to “Respect, preserve and enhance Georgia’s natural and cultural heritage”. Herewith, alongside the World Bank Group, the Government of Georgia has implemented the Regional Development Programs (RDP). The projects focus on benefiting the local residents of each region, including the restoration of historical houses, urban regeneration, improved municipal services and infrastructure, tourism SMEs support and job creation, development of an attractive, varied and safe tourism. Each project is expected to boost the volume of the private sector investment in the region and to increase points of sales (tourism-related enterprises) in renovated culture heritage sites and historic cities. Another important step of Georgia is the establishment of the Convention Bureau. The Convention and Exhibition Bureau of Georgia operates as a sub-division of the Georgian National Tourism Administration. The Bureau is fully government funded and has private sector members, representatives of the Hotels, Venues, Airlines and Supporting industry (catering, transportation, etc.).

48. The tourism sector in *the Hellenic Republic* has achieved historical records in 2015-2017 and has turned into a driving force for the national economy. In 2017, Greece recorded more than 30 million international arrivals and a 9% increase in tourism traffic. Moreover, the tourism sector absorbed investments of more than 3 billion Euro in 2017 and more than 350 investment projects for hotels of 4 and 5 stars were submitted for licensing in the reported period (existing and new). The policy-making concerning the tourism sector in Greece is assumed by the Ministry of Tourism of the Hellenic Republic. The strategic goals and actions of the national tourism policy are, *inter alia*, the following: Promotion of Greece as a "global attractive, safe, destination 365 days a year"; Increase tourism sector’s contribution to Gross Domestic Product (GDP); Increase revenues per visitor; Upgrade the tourist product, services and infrastructure; Extension of the tourism season, enrichment and diversification of the tourism product; Promotion of the competitive advantages of new Greek destinations; Development of thematic tourism – creation of new thematic products; Entering new foreign markets; Creation of a digital ecosystem for Greek tourism in 4 strategic pillars (digital transformation of services to citizens - enterprises, digital upgrading of tourism education, integrated systems of online data collection and processing); Regulation of the Sharing Economy - Short-term Lease of Real Estate.

49. Tourism is one of the priority sectors of the economy of *the Republic of Moldova*, a key component of the economic and social life. The activity of the Tourism Agency during the period of 2013-2017 in the Republic of Moldova was carried out in accordance with the Action Plan of the Tourism Agency and the objectives established in the Tourism Development Strategy – Tourism 2020. In 2017, the Republic of Moldova was ranked fifth in the world among countries with the fastest growing percentage of tourists. The International Guide "Lonely Planet" and "National Geographic" ranked the Republic of Moldova in the top 10 destinations recommended for 2017. The Moldovan tourism sector was recognised at the international level thanks to the 61<sup>st</sup> Meeting of the World Tourism Organisation Committee (UNWTO), carried out for the first time in Chisinau, in the period of 5-7 June 2018. The

Agreement between the Government of the Republic of Moldova and the World Tourism Organisation under the UN (UNWTO) on carrying out the UNWTO Third Global Conference on Wine Tourism was signed on 20 April 2018 and aimed at establishing the conditions required for the organisation of the Third UNWTO Global Conference on Wine Tourism, on 6 and 7 September 2018. The Republic of Moldova is a tourist destination of major interest to foreign citizens whose number is growing permanently. The mobility of the Moldovan citizens is also worth noting. With a population of about 3.0 million inhabitants, the Republic of Moldova records more than 5 million exits/entries of Moldovan citizens per year.

50. The *Romanian* field of tourism is developing permanently but the challenge is to exploit its full potential in order to have a sustainable economic increase. According to the National Institute of Statistics, the number of foreign tourists visiting Romania increased in 2017, by 109.5% compared to 2016. The Government of Romania envisages the following measures for the period 2018-2020, in the field of tourism: Adopting the Tourism Law; Establishing a National Center for learning and training for the labor force in the field of tourism; Ensuring the funds in order to finalize the investments in the field of tourism; Developing green tourism: establishing and developing localities where the nature and cultural heritage are not influenced by modernity so that to make them attractive for tourism. The National Tourism Development Master Plan for Romania 2007 – 2026, is the main tourism strategy and it is developed in collaboration with the World Tourism Organization, with the aim to provide strategic directions in order to compete effectively in the global marketplace. The key objectives of the Master Plan are: To develop and implement annual collaborative public/private sector destination marketing plans targeting all the major markets with potential for Romania; To establish a network of coordinated tourist information centres in all the main tourist areas in order to extend a warm welcome to visitors, providing appropriate information to assist in their orientation, enjoyment and appreciation of the destination; To consolidate the legal framework for tourism so that to ensure its good practice and to guarantee high standards without undue bureaucracy. Following the National Eco-Tourism Strategy, a system for evaluating eco destinations was elaborated. Romania is the first country in Europe which developed such a system. It is based on the European Ecotourism Labeling Standard, recognized at international level in September 2012, by the Global Sustainable Tourism Council.

51. In 2015, for the first time, *the Russian Federation* was ranked in the top ten most visited tourists destinations in the world. In 2017, the tourist arrivals amounted to 24 million. At federal level, the main legislative act defining the State policy of Russia in the sphere of tourism is the Federal Law on the basis of tourist activity in the Russian Federation (1996), which defines the principles of a single tourist market in the country; regulates relations arising in realization of the right of citizens to rest, freedom of movement and other rights during travelling; determines the order of rational use of tourist resources of the Russian Federation. In accordance with the concept of long-term socio-economic development of the Russian Federation for the period up to 2020, one of the main directions of the transition to an innovative socially oriented type of economic development of the country is the conditions for improving the quality of life of citizens of the Russian Federation. These conditions include the development of recreation and tourism infrastructure as well as ensuring the quality, accessibility and competitiveness of the tourist services in the Russian Federation. The establishment of the foundations of the modern tourism and recreational industry and its competitiveness on the international market is currently included among the main priorities of the state's social and economic policy. The priority areas highlighted in the concept of long-term development include the promotion of cultural and cognitive tourism, the provision of an integrated approach to the preservation of cultural and historical heritage, the development of environmental Tourism, stimulating the interest of young people to the historical and cultural

heritage of Russia, the protection of the environment through the development of the system of internal tourism. The objectives of the state program of the Russian Federation on "Development of Culture and Tourism for 2013-2020 years" are the establishment of tourist and recreational complexes in the Russian Federation; Improving the quality of tourist services; Promotion of tourist product on the world and domestic tourist markets. The Federal Agency for Tourism (ROSTURIZM) pays constant attention to the cooperation within the BSEC Organization and actively participates in the meetings of the BSEC Working Group on Tourism and the meetings of the ministers of the BSEC Member States.

52. According to the Tourism Development Strategy in *the Republic of Serbia* for the period 2016-2025, the tourism sector will reach 12.5% of GDP. It is considered that tourism will have a growing share in the GDP and will increasingly contribute to the economic growth. Thanks to the development of hotel accommodation, foreign direct and domestic investments in the hotel infrastructure, it is expected that the tourism will have a further positive impact on the country's economy as it will increase the number of employees and enable further development of a large number of small and medium-sized enterprises whose activities would directly and indirectly be connected to tourism. The Tourism Development Strategy in the Republic of Serbia for the period 2016-2025, envisages that by 2025, the number of tourist nights will have been increasing at a rate of 13.5%. In 2017, tourism as an activity, recorded an increase of 7.7%, compared to the previous year. The total number of employees in the accommodation and food services sector increased by 5.7%, in the same period. There was an increase in the number of tourist arrivals by 12.1% and the number of overnight stays by 10.5% in 2017, compared to 2016.

53. In the first half of 2018, *the Republic of Turkey* was visited by 16 million tourists, bringing the country ever closer to the target for this year: 40 million tourists and 32 billion Dollars in revenue. Increasing the international competitiveness, the market share and the brand value of Turkey in the field of tourism is among the strategic objectives of the Ministry of Culture and Tourism. In the context of the abovementioned goals, numerous projects and activities are carried out: Execution of physical planning activities of every scale, at the Culture and Tourism Protection and Development Zones and Tourism Centers; Ensuring the allocation of public properties for tourism purposes, in line with this goal; Implementation of statistical data gathering and evaluation and making the findings available to the sector, with a view to develop the tourism policies; Enhancing service quality through meetings with industry representatives and associations; Organizing Widespread Tourism Training programs (vocational and awareness-raising trainings); Engagement in thematic promotion and marketing activities for health tourism. Within the framework of the Law no. 2634 on Promotion of Tourism and also the Sea Tourism Regulation published in the Official Gazette no. 27298 dated 24.7.2009, the Ministry certifies sea tourism facilities and sea tourism vessels in order to develop and promote the investments and the sea tourism facilities and vessels. The law ensures that these are used safely, determining the qualities and standards to make sure that these enterprises are beneficial for the national economy and tourism, increasing the international competitiveness and the quality of the sea tourism industry.

54. One of the priorities of the Government of *Ukraine* is to improve the effectiveness of the formation and the implementation of the State policy in the field of tourism through: Introduction of legal mechanisms that will contribute to the successful development of the tourism in Ukraine, increased investments for the development of tourism infrastructure; realization of marketing measures on formation of a positive tourist image of Ukraine abroad and the promotion of the national tourist product in domestic and foreign markets. In 2017, the tourism arrivals in Ukraine amounted to 14.4 million foreigners, which is by 6% more than in

2016. Most foreign tourists came from Moldova, Belarus, Russia, Poland, Hungary, Romania, Slovakia, Turkey, Israel and Germany (according to the Border administration). According to the World Tourism and Travel Council (WTTC), in 2017: The direct contribution from the sphere of tourism and resorts in the GDP of Ukraine was 1.5% of the GDP. During the period of coordination of the Working Group on Culture and Tourism (1.07.2013 – 30.06.2015) the Ukrainian side presented the concept of the project "Development of Cruise Tourism in the Black Sea Region" (26.02.2014, Yalta, Ukraine). The purpose of the concept is to establish an effective cooperation among the countries of the Black Sea Region, on topical issues of cruise tourism development, unification and simplification of border and customs procedures at the crossing of the State borders, cruise tourists, the development of uniform requirements for the provision of services in the organization of cruise tourism by the staff of cruise ships.

## **CONCLUSIONS**

55. Over the last decades, at the world level, the tourism industry has grown to become one of the primary sources of income for many countries. Despite economic challenges, millions of tourists worldwide seek attractive tourist destinations, eager to feel the thrill of the unknown. Consequently, new sites and countries have gain their spot in the global tourism map next to traditional destinations while new forms of alternative tourism, such as religious tourism, agrotourism and medical tourism have emerged.

56. Within this context, the Black Sea Region, with its diverse and unique landscape, cultural wealth, historic heritage and wide variety of opportunities for leisure, stands among the world's most beautiful tourist destinations, attracting millions of tourists from around the world. However, it is important to underline that the economic profit is the one side of the tourism development in the Region.

57. The BSEC Member States should explore the possibilities for future cooperation, particularly by exchanging the best practices and by sharing experiences on the key aspects of travel and tourism among the different countries, e.g. from the more mature destinations to emerging ones. Also it is necessary to be considered the current technology advances and the rise of the digital tourism, of modern marketing tools, such as social media and mobile technologies, which could be used to promote the BSEC Region as a unique multi-destination area worldwide.

58. In order to strengthen the cooperation in the field of tourism within wider Black Sea Region, the Member States should create competitive tourist products and advertizing campaigns in order to promote the Region on the international market, to increase the tourist flows, develop cruise, wine, spa tourism, increase the economic efficiency of the tourism, as a premise of socio-economic development of the countries of Black Sea Region.

59. It is important to foster closer regional cooperation in the field in order to produce a mutually beneficial outcome that will promote competitiveness at a regional and international levels. Information sharing, working groups and training sessions for the professionals and the entrepreneurs should be included in a short term plan of action, as a first step to the further development of the sector.

60. Another important issue is to strengthen the connectivity among the BSEC Member States and other markets, by air, land and sea, highlighting the importance of a closer coordination between the tourism and the transport policies. Governmental policies aiming at easing visas

procedures in the BSEC Region can contribute significantly to stimulate the travel demand and create jobs.

61. The Organisation of the BSEC, in close cooperation with its Member States and related bodies, works actively towards adopting common projects and initiatives for the development of the tourism and the protection of environment. Building a sustainable future for the wider Black Sea Region is a common target which requires the support of all the involved parties: national authorities, local stakeholders, civil society and private sector.