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Eastern Black Sea Region Tourism Development Study

FINAL REPORT

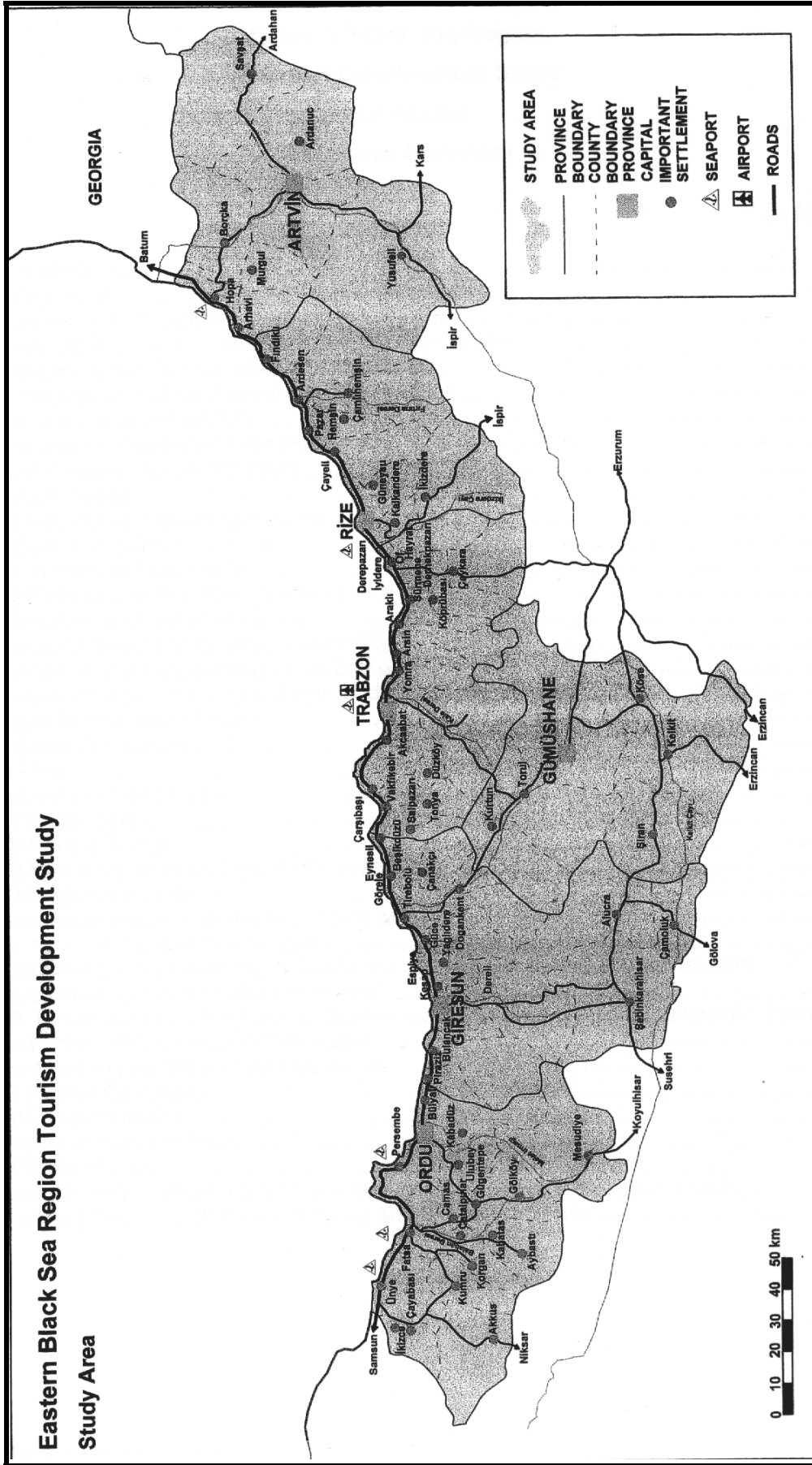
EXECUTIVE SUMMARY

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Eastern Black Sea Region Tourism Development Study

Study Area



**Eastern Black Sea Region
Tourism Development Study
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Eastern Black Sea Region Tourism Development Study is realized under the provisions of the protocol between the State Planning Organization (SPO) and Japan International Cooperation Agency (JICA). The main work programme for the Study is as follows:

- i. Collection of data with regard to the tourism sector and review of developments,
- ii. Research into eco-tourism opportunities including its institutional framework,
- iii. Developing tourism types based on natural and cultural assets,
- iv. Modeling a participatory approach for the development of plateau tourism,
- v. Determination of the bottlenecks for the development of tourism and identification of measures for their remedies,
- vi. Determination of tourism development corridors and areas in view of the future opportunities including the potential of neighboring countries.

1 Purpose of the Study

The study aims to develop the favorable conditions for the development of tourism sector, including eco-tourism, increased cooperation amongst the provinces, increased number of incoming tourists both domestic and foreign and adequate training of the joint stakeholders (i.e “partners”) of the sector in the Region which is comprised of the Provinces of Ordu, Giresun, Trabzon, Gümüşhane, Rize and Artvin. In this respect, development of small scale agro-industry and handicraftsmanship are also expected. The provinces within the scope of the Study comply with the new statistical regional units – Level 2 (IBB2).

2 Study Organization

The Development Study, financed by the Japan International Cooperation Agency (JICA), has been conducted under the coordination of JICA and Prime Ministry Undersecretariat of State Planning Organization (SPO). The relative outputs at all stages of the Study, have been reviewed, evaluated and directed by the members of the “Steering Committee” comprised of representatives from related ministries, provincial directorates of culture and tourism, and non-governmental organizations (NGO’s).

In accordance with the participatory approach of the Study, “stakeholders (or partners) meetings” were held in all provinces with the attendance of all those parties related with the sector. These meetings provided the platform for the search to identify the strengths and weaknesses of the Region in terms of tourism development, potential opportunities in the future and threats to the sector. There were a total number of 302 participants in these meetings. Besides these meetings, public awareness meetings with more than 250 participants were held in Trabzon, Artvin and Rize and tourism training seminars were given Giresun and Rize.

In the survey, 572 foreign and domestic visitors were interviewed and questionnaires were completed. In a similar respect, the local travel agencies, tour operators and owners of accommodation facilities were also interviewed. Thus, the Study has referenced to more than one thousand views, individual or corporate/institutional. The participatory approach has been employed throughout the Study.

3 Regional Tourism: The Demand Structure

Even though the Region historically has had important potentials for the development of tourism, tourism has shown development after mid '90's. The first influx of visitors occurred in early '90's after the dissolution of the Soviet Union. Most of the visitors' main purpose was "business" and this has created an activity termed as "luggage trade". During the initial first few years the sector has had to meet the demand for accommodation by the municipal licensed accommodation facilities.

The developments and especially the developments due to domestic visitors that took place after mid '90's were the main thrust in the changing demand structure. Increase in the number of ministry licensed facilities and an increase in the quality of the services provided are observed in this period.

3.1 Arrivals to the Region – Domestic and Foreign Visitors

The domestic visitors comprise the main component of the regional tourism. Domestic visitors have the major share in the utilization of the accommodation facilities and in overnight stays.

A total of 352,562 arrivals have been realized for the year 2002 in the accommodation facilities with ministry operation license. 18.5 %, constituting 65,377 of these arrivals have been foreign visitors while the remaining 287,185 representing 81.5%, were domestic visitors.

3.2 Accommodation Opportunities and Capacities

The Region is recently have been undergoing into an era of increased tourism activity. The share of foreign visitors within this increased activity is considerable. Organized tours are now the main means of travel to the Region for purposes of tourism. As a result, quality has become important in both physical facilities and in service along with the increase in the number of facilities and their bed capacities. Still, the numbers of facilities licensed by the municipalities are higher than the ones licensed by the Ministry.

At the end of 2002, there were a total of 17,252 beds in the Region. Of these 74% or 12,704 beds, municipal licensed and only 4,548 are Ministry licensed.

In summary, it is observed that the numbers of Ministry licensed facilities, rooms and beds in the Region are below the national average. With respect to tourism facilities development, the Region is less developed than the national average.

3.3 Distribution of Visitors According to Nationalities

There is an important level of diversification in the nationalities of the visitors staying in the ministry licensed facilities in the Region compared to the national level. It can be observed that the visitors with eastern European nationalities have the major share of the visitors in the Region with 69% for 2002. Visitors from OECD countries account for 23% and visitors from Asian countries account for 6%. These figures for the national level are 15% from eastern European countries, 76% from OECD countries and 6% from Asian countries for the same year.

This shows the intensive interest the visitors from eastern European countries have shown to the Region after 1990.

3.4 Main Attributes of the Visits

The average length of stay of foreign visitors in the Region is below the national average length of stay. The average length of stay of foreign visitors in all facilities (i.e. ministry and municipal licensed) is 1.43 days whereas this figure is 1.25 days for domestic visitors for the year 2002. Average overnight stays are 1.28 days. In contrast, these figures for the national average for the year 2002 are 4.06 days for foreign visitors and 1.72 days for domestic visitors with average being 2.76 days.

On the other hand, the survey conducted with the foreign visitors in the Region show that the average length of stay in the Region is 3.29 days. The figure of the Ministry of Culture and Tourism for 2002 is based on the accommodation facilities and is 1.43. These figures show that the regional provinces should be targeted as destination points rather than transit points.

3.5 Trends in Visitors' Spending

According to the data of the Ministry of Culture and Tourism, in 2002, a foreign visitor has spent an average of \$764,3 during his/her stay in the country. The average spending per day, on the other hand, is \$190 per person. The survey conducted in the Region has shown that this daily spending is \$211,7 per person. This higher value than national average should be considered as normal. It is a known fact that visits with nature and culture concerns have different spending structures and that these visitors spend more than the visitors with other concerns.

The spending by the domestic visitors, on the other hand average \$133,1 per person per day. This is an expected result when compared with the spending by the foreign visitors.

3.6 Evaluation of the Sector from the Demand Side

The purpose of visits to the Region have changed and diversified. Domestic and foreign visitors visit the Region for both natural and cultural concerns and for business concerns. The first shows as seasonal fluctuation in demand. The second one shows more stability. Seasonal fluctuations in demand and limited season are major bottlenecks for the tourism facilities. Reduction in the seasonal fluctuations and increase in the number of nights spent appear as the main objectives to be attained.

Development of the Region as a Destination Point: One of the preconditions for the Region to take off in tourism sector is, different from the current situation, is the perception of the Region not as a part of some wider tour but as a destination point.

Increase in the Number of Tours to the Region: An emerging sectoral objective is the increase in the number of tours to the Region as well as organizing tours within which the Region is the destination point. Through successful promotion and development of agro-tourism and eco-tourism in the internal zones of the Region, the attractiveness of the Region will be increased.

In this respect, regional travel agencies and tour operators should be strengthened and they should establish partnerships with large scale national and international tour operators.

Increase in the Number of Individual Visits: The increased interest in the Region will, undoubtedly, increase the number of individual trips to the Region without any association with any tour. In order to attract the interest of the target group, the potentials of internet opportunities should be utilized by the accommodation and other types of tourism facilities. It is important, and is becoming more and more important, that these facilities should have functions such as reservations and sales on the internet. Similarly, the travel agencies are expected to utilize the opportunities provided by the internet. This will enhance the mobility of the individual.

4 Regional Tourism: Supply Structure

With the abundance of natural and cultural assets the Region portrays all the potential for the development of alternative tourism. There is no evident problem regarding the supply of tourism products but preservation of these assets is critical during the mobilization of resources.

4.1 Natural Assets

The Region has different sub-geographies as well as sub-climatic conditions. Four main sub-geography appear and these are: the Coastal Section, Inner Sections, Mountains and Peaks and Southern Section Valleys. Natural assets are much diversified and are distributed in the Region. Some of these assets are highly valuable on a world scale. These are under protection as National Parks or as other statutory areas. The Region also has Natural Sites declared by the Ministry of Culture and Tourism.

4.1.1 Mountains, Forests and Rivers

The natural resources are the most important potentials to be protected. Such assets as forests, rivers, lakes and glaciers exist in the interior sections. The mountains have peaks as high as 3,900 meters. The section between the coast and the Eastern Black Sea Mountains are covered with dense forests. These forests sometimes extend up to 2,200 meters. These forests are important genetically resources and house various endemic types of vegetation.

The natural structure and the climate of the Region have rendered an extraordinary biological diversification.

4.1.1.1 Flora

The Region has a rich and diversified flora. These areas show “biogenetic reserve” character. These biogenetic reserve areas are areas for determined protection and they carry importance at the world scale for tours that have scientific purposes.

4.1.1.2 Fauna

The high mountains, deep valleys, abundant rain and rich vegetation have provided suitable habitats for many wild animals as well as resting place for migrating birds.

4.2 Cultural and Historical Assets

Eastern Black Sea Region- throughout history, has been the cradle for many civilizations and cultures. As part of Anatolia, the Region has served as the transition zone between Europe and Asia. Many different cultures have come together in the Region due to the commercial character of Black Sea since the times of antiquity and the “Silk Road” that passes through the Region.

4.2.1 Traditional Way of Life

It can be observed that the cities and large settlements are located along the coast whereas rural settlements are located on the hills along the valleys of the inner sections of the Region. Due mainly to topographical conditions, important urban settlements other than the port cities of Trabzon and Batumi (in Georgia) did not emerge. On the other hand, villages based on population with relative ties are dispersed and have dominated the settlement pattern of the Region.

Villages are dispersed into wide areas inside the valleys. In contrast to the villages located elsewhere in the country, they have not formed unified closely settled rural centers. Topographical structure of the Region is the main cause of this widely dispersed structure.

The rural character is also dominant in the way of life and the culture. The rich local folklore, dances and the music, cuisine and apparel have all being conditioned by this character. Today's folkloric assets of the Region are formed with the addition of the basic regional urban culture to these.

4.2.2 Folklore and Traditional Dance and Music

As is the case with the other cultural components, dance and music are also affected by the difficult topographic conditions. "Horon", a local dance in the Region is a fast dance. There are dances in Artvin and its surroundings that reflect the effects of Caucasian culture. The music is also affected by the harsh geography. These folkloric assets together with local apparel and dishes are riches that will create the image of Eastern Black Sea Region.

4.2.3 History and Historical Assets

The Region that serves as a transition area between different geographies has witnessed different cultures under different rules. There are many architectural examples that have remained as the heritage of different cultures.

The immovable cultural inventory of the Region is mainly comprised of civilian architecture such as bridges, mosques, churches, monasteries, administrative buildings, inns and military examples such as castles and towers. Most of these are located within the traditional fabric or blend into their natural environment. The coexistence of cultural and natural assets side by side gives the Region a special character.

4.3 Transportation Systems and Accessibility

One of the major bottlenecks is the distance between the Region and the main metropolitan areas in the country. Besides this unfavorable condition created by geographical location, problems associated with the topographical and geological structure of the Region appear during the construction of highway and railway systems and airports.

The Regional transportation network is structured according to the Regional topography. The axis parallel to the coast is the Regional spine that extends from east to west. The state highway between the westernmost point of the Study Area (Ünye in Ordu) and easternmost point (Sarp Border Gate in Artvin) is being improved as a "divided" highway. The axis along north – south direction provides access to the interior sections and to other regions depending on the existence of the passes through the mountains. The most important north – south axis is the Trabzon – Gümüşhane – Bayburt – Erzurum axis. There are secondary axes as well.

Sea transport, which once carried importance for the Region, at present, is nearly non-existent. Air transport, on the other hand, is gaining more and more importance but at present only one civilian passenger airport serves the Region; Trabzon Airport. Airports close to the Region are also being utilized for trips to the Region (i.e Samsun and Erzurum Airports). There is no railway transport system in the Region.

Another drawback in the Region is the limited accessibility to the rural settlements. In almost all provinces, the rural settlements and plateaus in the interior sections can be reached with

difficulty. Regional topography together with regional geology affects both initial construction of roads and their maintenance.

4.4 The Views and Expectations of the Stakeholders

The stakeholders' meetings held in the provinces provided the views and expectations of the stakeholders in the tourism sector with regard to the issues concerned with tourism development. The majority shared the view that the most important bottleneck is the inadequacy of regional promotion and the non-existence of any programs for effective promotion and marketing of regional tourism products..

In order to remedy this situation, the stakeholders recommended that relations with large scale domestic and foreign tour operators should be established, local travel agencies and tour operators need to be strengthened, relations with the media should be developed and attendance to international tourism fairs should be realized.

Institutional Strengthening and Capacity Increase, The stakeholders have views and expectations regarding the development of the institutional framework and increasing institutional capacities. Many expectations ranging from infrastructure to promotion, from transport systems to training in tourism, were voiced during the meetings. A point for important consideration is the joint view of the stakeholders that all these expectations can be realized only through increasing the management and financial capacities of the public sector.

Another interesting point raised was that the stakeholders accepted the fact that previous cooperation between the stakeholders were not at desired levels but, that they are also not optimistic for such needed cooperation to be realized in the near future.

On the other hand, the importance of public – private sector partnerships were also stressed but again, it was pointed out that the regional experience has not been successful.

Human Resources Development and Increase in Workmanship Knowledge. This subject has been an important subject on the agenda of all meetings. The need for trained and educated human resources was heavily stressed by tourism facility operators. The stakeholders have pointed out the importance of on the job and mass training issues as well as formal education.

4.5 Review of Regional Tourism Supply and Recommendations

There are important steps to be taken in the fields of product differentiation, image making, product marketing, institutionalization and human resources development in order to secure proper development of the tourism sector.

Product Development and Creation of Product Image should be an objective to be reached in all circumstances. The rich cultural, natural and folkloric assets of the Region provide the favorable environment for the creation of a “regional image” An example to this is the regional festivals carrying messages of “peace” and “support” or other components such as the regional drink – the tea – or regional cuisine or dance and music. These all can be image creators once a favorable environment is provided.

Product Marketing. At present, it is observed that the regional cultural and natural assets can not be effectively promoted and marketed as tourism products. Comprehensive campaigns are required for successful image promotion and marketing. These campaigns should address the likes and expectations of different target groups including the relations with the media. In campaigns, advanced techniques should be

employed for those products which the Region has comparative advantage. The techniques employed shall include the utilization of the internet, the potentials of internet opportunities, web sites and sales and reservations on the internet. The marketing of the product with current most advanced techniques but with the essence of the local identity and folklore will provide special interest.

Institutionalization. Another major bottleneck is the inadequate levels of institutionalization in the Region. The need for institutionalization requires immediate attention. It is a must that the stakeholders' cooperation and coordination be formally institutionalized. One of the major reasons behind the unsuccessful promotion and marketing is the non-existence of appropriate institutions. Such institutionalization can be in the form of cooperatives or associations or as commercial entities based on partnership with the public sector.

Human Resources Development is presented as the primary prerequisite for development by the owners and operators of tourism facilities. Tourism is one of the sectors most sensitive to human resources and trained and educated staff is the precondition for providing high quality service. All educational and training programs in formal and mass education channels can be utilized towards the development of human resources required by the sector.

5 Development Policies in Tourism

A series of political and strategic interventions are required for proper development of the tourism sector in the Region. In this respect, the present Study aimed first at defining the areas of political decision making. After these were set, the strategic measures towards the implementation of those policies were identified. As a natural extension to this reasoning, detailed development strategies were recommended for some selected corridor and areas of development.

Basic Policy 1: Tourism Sector as the Locomotive Sector for Regional Development

This policy is the first policy to be followed. In this respect, the demand and supply structure, institutional capacities and human resources development issues are dealt with.

Basic Policy 2: Tourism as an Income Generating Activity; This policy appears as the second most important policy for sectoral development. The local initiatives should be aware of the characteristics of the sector and tourism shall be accepted and supported by the regional population.

The relative backwardness of the Region on one hand and the potentials with natural and cultural assets of the Region on the other shows that tourism can be a locomotive sector and thus approves the path for the first policy.

In most countries, the civilian ventures are seen as the main thrust behind development in tourism. Today, it is required that the development should commence with the civilian initiatives without waiting for the completion of large scale public investments and that the supply shall be programmed in accordance with increasing demand resulting in phased development. The Region possesses areas that are extremely sensitive to environmental conditions. The protection of these areas is contingent upon the attitude of the local population. Public awareness should exist in terms of protection of natural and cultural assets for tourism development. The potential increases in the regional welfare that will result due to the vigorous implementation of this policy have guided the formulation of the second policy.

6 Development Strategies

The development proposals are formulated in accordance with a series of strategies. Above all, development is contingent upon successful promotion and increase in the market share. The tourism products, on the other hand, will be structured based on the preferences and demands of the visitors.

The strategies that are regarded as important in promotion, marketing and product differentiation are given under the headings of “*Creating the Eastern Black Sea Image*”, “*Increasing Customer satisfaction*”, “*Developing Relations With the Tour Operators*”, “*Creation of Corridors in which Tourism Products are Concentrated*” and “*Development of New Types of Tourism*”.

Strategy 1: Creation of the Eastern Black Sea Regional Image. A successful image is a must for success and increase in the market share. The natural and cultural assets and especially the folkloric assets are very supportive for success and an effective image. An effective promotional campaign is required to register the image. Such a campaign should utilize all the opportunities provided by the national parks, nature preservation sites, old forests, coastal areas and the beaches and the regional flora and fauna as well as cultural assets, urban fabrics, monuments, regional music and dance, and other appropriate characteristics.

Strategy 2: Increasing the Level of Customer (Visitor) Satisfaction and increase in the market share as a result is assumed as a major strategical measure. Indisputable preconditions for increased customer (visitor) satisfaction are easy access to information regarding the Region, high levels of service quality coupled with the physical quality of tourism facilities, developed transport and infrastructural services, proper supply of urban service and existence of cultural and sports facilities.

Strategy 3: Developing Relations With Tour Operators. Tour operators are important stakeholders in the sector. They are specialized in accordance with their role in the relatively complex structure of the sector. Most of the marketing in the sector and market promotion are undertaken by these operators. It is a necessity that these operators should be contacted and cooperation with them established in order to increase the Region’s share in the market. The domestic and international tour operators should be supported to include the Region in their portfolios and itineraries. Local travel agencies and operators should be encouraged to establish relations with these large scale operators. In this respect, the utilization of the potentials in neighboring countries and inclusion of the Region in tour programs for those countries will increase the market share of the Region.

In order to attain such a development, those tour operators shall be invited to study and discuss joint programs, international fairs should be attended to and internet opportunities shall be utilized.

Strategy 4: Creation of Corridors in which Tourism Products are Concentrated and supporting these corridors with all possible measures will another strategy. These development corridors should be given priority in order to easily access the natural and cultural assets and to establish systems of transport and infrastructure. The geographical distribution of natural and cultural assets and the existing transport system defines these corridors.

14 corridors are identifies in the Region. There are 3 in Urdu, 2 in Garson, 4 in Tarzan, 3 in Rise and 2 in Arvin. Gümüşhane is located on the South Tourism Corridor that starts from Trabzon. Definition of the corridors on the basis of provinces will ease the measurement of development once these provinces are functioning as NUTs 3 statistical units. In principle, tour routes are proposed on these corridors. At least 4 days are required to visits these corridors. Thus, overnight stays are targeted to be above 4 days.

These assets and tour routes are announced on the web site www.dokap.net both in English and in Turkish.

The coastal section is reached by the state highway numbered D 010 which at present is being improved as a divided highway. This route is one of the major development corridors in the Region. This corridor is divided into 5 sub-corridors based on provincial boundaries.

1. **Coastal Axis 1** – Approximately 95 km. long band that includes the coastal section of Ordu and the area between the borders of Samsun and Giresun provinces. Ünye, Fatsa, Perşembe, Ordu, (Central District) and Gülyalı settlements are located on the corridor. The major assets are the opportunities for sea tourism (beaches, fisherman’s wharfs, and urban tourism) and cultural tourism (urban fabrics, monuments, museums). Coastal (sea) tourism and culture tourism are the proposed tourism types for development.
2. **Ordu South Axis 1** - This axis covers the 120 km. long area between the Central District of Ordu and the border of Sivas province on the north-south direction. Ordu (Central District), Kabadüz and Mesudiye are the settlements on the corridor. Trekking, camping, photo-safari, nature sports and alternative tourism opportunities are the main assets.
3. **Ordu South Axis 2** – The axis covers the 105 km. long area between Fatsa district center and Mesudiye district center. Fatsa, Çamaş, Gürgentepe, Gökçöy and Mesudiye settlements are located on the corridor. The axis provides opportunities for nature sports, trekking, photo-safari and camping.
4. **Coastal Axis 2** The 100 kms. long band between the borders of Ordu and Trabzon make up the Giresun coastal section. Piraziz, Bulancak, Giresun (Central District), Keşap, Espiye, Tirebolu, Görele and Eynesil are the settlements on the corridor. The axis provides opportunities for sea – coastal tourism and culture tourism.
5. **Giresun South** - The 75 kms. long corridor that extends from Giresun city center to south up to the border of Şebinkarahisar. Giresun (Central District) and Dereli are the settlements on the corridor. Plateau tourism and associated activities in alternative tourism are the main opportunities along the axis.
6. **Coastal Axis 3** – This axis covers the coastal section of Trabzon province and extends 125 kms. between the borders of Giresun and Rize provinces. Beşikdüzü, Vakfıkebir, Çarşıbaşı, Akçaabat, Trabzon (Central District) Yorma, Arsin, Araklı, Sürmene, Of are the settlements on the corridor. Sea – coastal tourism, culture tourism and the airport as the port of entry to the Region are the main assets along the corridor.
7. **Trabzon South 1-Gümüşhane Axis** – The axis extends south from Trabzon, includes Gümüşhane and reaches the border of Bayburt province. Trabzon City Center, Maçka, Kürtün, Torul and Gümüşhane are the settlements on the corridor. Alternative tourism products, natural and cultural assets are integrated along this axis. There are endemic natural assets as well as antique settlements and historical ruins along the axis.
8. **Trabzon South 2** – This 50 kms. long axis extends between Akçaabat and Düzköy on north-south direction. Akçaabat and Düzköy are the settlements on the axis. The area provides opportunities for alternative tourism with its natural assets and local endemic way of life. The plateaus also provide rich potential.
9. **Trabzon South 3** – This axis is 60 kms. long and extends north –south between Of and Uzungöl. Of, Dernekpazarı and Çaykara are the settlements on the axis. The area provides opportunities for alternative tourism with its natural assets and local endemic way of life. Plateaus with outstanding sceneries provide important tourism potentials.

- 10. Coastal Axis 4** – This coastal axis is the coastal section of Rize province. It extends 100kms. between the borders of Trabzon and Artvin provinces. İyidere, Derepazarı, Rize (Central District), Çayeli, Pazar, Ardeşen and Fındıklı are the settlements on the axis. Mass and sea tourism potential and culture tourism are the main assets. The visits to the interior sections organized by tours commence on this axis.
- 11. Rize South Axis 1** – This axis extends along the famous Fırtına (Storm) Valley from Ardeşen to Kaçkar Mountains National Park on the south. Ardeşen and Çamlıhemşin are the settlements on this 45 kms. long axis. Outstanding natural assets side by side with cultural assets and opportunities for alternative tourism are the main assets. The axis is well known both nationally and internationally and enjoys intensive tourism activity.
- 12. Rize South Axis 2** – This axis extends south commencing from Trabzon provincial border up to the border with Erzurum province. İyidere, Kalkandere and İkizdere are the settlements on this 85 kms. long axis. Unspoiled natural assets together with opportunities for alternative tourism are the main assets. This corridor also attracts attention due to its unspoiled natural structure and cultural characteristics.
- 13. Coastal Axis 5** - Covers the coastal section of Artvin province. This 35 kms. long corridor is between the provincial border of Rize on the west and the national border with Georgia on the east. Arhavi and Hopa settlements are located on the corridor. Mass and coastal – sea tourism potential, border trade, culture tourism and natural assets are the main opportunities for tourism development. Due to the border with Georgia, the area has a dynamic structure.
- 14. Artvin South 1** – This axis is 180 kms. long and extends between Hopa and the provincial border of Erzurum. Hopa, Borçka, Artvin (Central District) and Yusufeli are the settlements on the corridor. The axis has connection in the direction of Şavşat. Undisturbed eco-systems, unparalleled natural riches and cultural – folkloric assets provide opportunities for alternative tourism.

Required Actions for the Development of the Corridors

The corridors which will form the main spine for tourism development are not yet developed except the coastal section and the section between Trabzon and Erzurum. Recommendations for the development of north-south corridors accessing the interior sections are given below.

Promotion and creation of Eastern Black Sea Region image, increased activity for marketing in foreign markets and strengthening of local travel agencies are required for proper development of these tourism corridors. Cooperation amongst the local travel agencies, coordination between the facilities and the agencies and utilization of all kinds of methods for effective promotion and marketing are needed.

Furthermore, the NGO's that deal with nature sports or other similar activities should be contacted and the opportunities of the Region should be promoted. Promotional units should be established in domestic and foreign markets in coordination with large scale tour operators.

Institutional Framework. New institutional structures and increased institutional capacities are required for the development of the corridors as specified. Different administrative units, that are also stakeholders in the sector, should cooperate efficiently. This cooperation is required not only for effective promotion, marketing and coordination but also for joint provision of infrastructural services at lower costs.

It is recommended that administrative units that share the same geography and cultural values (provinces and districts) establish “Eastern Black Sea Region Union of Local Authorities for Tourism Development and Infrastructure Provision” or a similar entity.

Environmental and Tourism Training Programs for the Local Population in the Corridors. The local population of the corridors should be given appropriate education and training in tourism. It is recommended that this program should be initiated by the public agencies and NGO’s. Respective faculties of the universities can be utilized for these purposes. The utilization of similar previous experiences in other parts of the country will be beneficial.

Strategy 5: Development of New Tourism Types, This will hold true especially for higher altitude areas with high sensitivity to environmental conditions. Partial developments are proposed without any mass tourism components and under strict control. These new types are expected to be developed in areas that have low accessibility or areas outside the main corridors. For example, green tourism (or as sometimes referred to as rural tourism) has potential in some areas. Another potential is relative developments associated with the sea and fishing in the fisherman’s wharfs and villages along the coast. Eco-tourism is proposed in areas of national or natural parks and in the mountains.

These new types of tourism will undoubtedly be new resources for employment and income for regional population. Local craftsmanship and agro-products are also expected to benefit from these developments.

Green Tourism, The existing rural settlements in the Region carry the potential for the development of all types of green or rural tourism. The interior sections can be developed based on the traditional way of life in the plateaus and rural settlements. The coastal sections, on the other hand, have the potentials for the development of agro-tourism within the fields of tea and nuts. The fisherman’s wharfs can be attractive for those interested in sea products.

Program 1: The Utilization of the Traditional Way of Plateau Life for Tourism Purposes. Green should be the first priority in such a program. Plateaus provide the opportunities ranging from agro-tourism to photo-safaris. The present day under capacity utilization of plateau houses can be changed in a positive manner with the development of this program.

This program can be achieved in all the rural settlements within the Region. However, it is recommended that the initial applications should commence in the rural settlements and plateaus of Rize and Artvin. Güroluk, Yukarı Şimşirli and Şenyuva villages near Çamlıhemşin in Rize are appropriate for this initial programme. Furthermore, Çamlık, Dereköy, Yeralan and Sivrikaya rural settlements in İkizdere district offer traditional architecture with traditional way of life. Salkımlı, Ahlat, Şehitlik, Yavuzköy and Meydancık and Camili in the Province of Artvin can be selected as pilot areas for the application of the programme.

Program 2: Ranch Tourism. This is an activity proposed for development in the tea and nut plantations on the coastal areas. Nut plantations extending from Ordu to Trabzon and tea plantations between Trabzon and Artvin are seen as prospective development areas.

Other parts of the Region also carry potentials for the development of ranch tourism. As with Program 1, first applications need to be selective. Thus, the rural settlements near Ordu, Ünye and Perşembe and those rural settlements near Giresun city are recommended for this initial development. In the eastern part of the Region, Akçaabat and Beşikdüzü rural settlements in Trabzon, Ardeşen and Fındıklı and Central District rural settlements in Rize, Arhavi and Kemalpaşa rural settlements in Artvin, Sarıççek Village and those rural

settlements near the Central District and Zigana mountain pass and Tortum and Spider Forest rural settlements are appropriate for the development of ranch tourism.

Program 3: Utilization of Regional Characteristics – Fishing, The Black Sea coast has the highest number of ports, piers, fisherman’s wharfs, anchoring sites, etc. The sea has an important part in the everyday lives of the coastal population. Fishing is the traditional economic activity of the Region.

Program 3 naturally will be realized on the coast. These activities are foreseen to take place in fisherman’s wharfs. These are mainly; Ünye, Fatsa, Bolaman, Yalıköy, Mersinköy, Kışlaönü, Efirli and Gülyalı in Ordu; Bulancak and Tirebolu in Giresun; Beşikdüzü, Vakfıkebir, Çarşıbaşı, İncir (Yoros), Darıca, Akçaabat, Faros, Yorma, Araklı, Balıklı, Yeniay and Of in Trabzon; Gündoğdu, Bozukkale, Çayeli Taşhane, Pazar, Ardeşen and Kanlıdere in Rize and Arhavi and Kemalpaşa in Artvin.

Eco-tourism envisages the protection of the sensitive natural and cultural assets and utilizing these assets for the promotion of tourism. It is an activity within which the visitors prefer to spend their time together with these assets and with the local population. The proposed program is formulated accordingly. The scope of eco-tourism covers such areas as trekking, botanical visits, photo-safaris, camping, mountaineering, rafting and others. Such tourism will generate incomes for the low-income portion of the local population.

There are national and natural conservation parks in the provinces of Trabzon, Artvin and Rize. These areas offer potentials for eco-tourism activities.

Hatila Valley National Park in Artvin carries with itself a very high potential in terms of the development of eco-tourism. Activities such as trekking, camping, botanical visits, flora and fauna sight seeing, river fishing and photo safaris can be realized in this area.

Sahara - Karagöl National Park also in Artvin, is very rich in terms of natural assets and includes plateau groups. It has rich natural sceneries with old forests.

Kaçkar Mountains National Park lies within both Artvin and Rize provinces. Besides its forests, the extraordinary topographical and geological structure attracts attention. The mountains also house the limited glaciers in the country. The glacier lakes and valleys are rare natural beauties. Visits to cultural assets, trekking, flora and fauna sight seeing, camping, plateau visits, gliding, rafting, fishing on Firtına and Hala Streams, mountaineering and climbing, visits to the glaciers and glacier lakes are the activities foreseen. At present, Mount Kaçkar is one of the most developed areas in the country in terms of eco-tourism. Important numbers of foreigners visit the area each year. Together with the rafting opportunities on River Çoruh, the National Park is an eco-tourism center.

Altındere, in Trabzon, carries importance with its natural assets. It also has cultural assets such as the Sümela Monastery. Its advantage lies in its proximity to plateaus and Zigana Ski Center as well as relatively easy access.

Gorgit Natural Conservation Area in Artvin is one of the few forestry eco-systems with old trees.

Camili-Efeler Natural Conservation Area in Artvin also possesses undisturbed forestry eco-system. It is also located on the migrating route of wild birds.

Gorgit ve Camili Efeler Natural Conservation Areas are suitable for scientific purposes for forests, birds and butterflies as well as for trekking and photo-safari activities.

Social and Ethnographical Tourism The main objective in this type of tourism is getting acquainted with traditional way of life and increasing the inter-cultural relationships and exchange. This type of tourism also contributes to the promotion of the region and the country in the international arena.

This programme is applicable in areas where traditional way of life and the cultural values are preserved. The urban fabrics and traditional architecture should also be preserved in these areas. Traditional activities such as handcrafts will further enhance the development of the programme.

The traditional urban fabric is disrupted in most of the urban areas within the Region. Examples of traditional architecture are also disappearing. There are, still, important areas that are preserved. These are mainly; Orta Mahalle in Trabzon, Zeytinlik Mahalle in Giresun, Tirebolu district center in the province of Giresun and parts of Perşembe and Ünye in the province of Ordu.

Actions Required for the Development of New Tourism Types

Priority in this respect is securing public awareness in terms of the benefits of tourism and environmental protection. Furthermore, public motivation programs need to be applied. The local population should be convinced to show their traditional hospitality to both domestic and foreign visitors.

Other measures besides this basic one are;

- i. Selection and support of the pioneering tourism entrepreneurs. In this respect, support from both public agencies and NGO's are required.
- ii. Education of the female population. In the new types of tourism, the visitor prefers to be a part of the local way of life and this requires proper education of the female population.
- iii. Improvement of rural and plateau houses and equipping them with necessary infrastructural facilities.
- iv. Social amenities, with security measures having priority, should be provided.
- v. The accommodation needs for the visitors to Hatila and Sahara - Karagöl National Parks should be met in nearby settlements such as Artvin and Şavşat. Within the boundaries of Kaçkar Mountain National Park, there are many rural settlements and plateaus in which accommodation facilities exist. The management plans and physical plans should consider this situation. Accommodation needs in Rize province shall be met in rural settlements of Çamlıhemşin. In the Artvin section of the Park, these needs can be met in Altıparmak, Yaylalar and Olgun villages by transforming the existing stock of housing into boarding houses. Similar measures should be applied for Altındere National Park. The accommodation needs for the visits to Camili-Efeler and Gorgit Natural Conservation Areas should be met in the district center of Borçka.
- vi. All motorized traffic in these areas shall be limited and utilization of organize energy sources should be supported. Information and direction signs should be posted on the trekking routes. Only daily facilities should be established in these areas.
- vii. Guide services should be provided in all parks and eco-tourism development areas. The local population shall be made aware of the reasoning behind the declaration of these areas as conservation areas.

- viii. In accordance with the approved plans (by the General Directorate of Natural Conservation and National Parks, daily facilities should be established. In this respect, views of the relative NGO's and their support are also necessary.
- ix. Both the traditional way of life and traditional production and the traditional settlement fabric and architecture should be preserved for the development of social and ethnographical tourism. The NGOs that attempt to preserve these shall be supported.

7 Action Plan

In order for the recommendations outlined above to be applicable, necessary measures should be taken within a comprehensive framework of an Action Plan. The Action Plan covers the measures to be adopted for tourism development, the roles of the actors in this development, their responsibilities and duties, institutional restructuring and capacity increase and programs associated with human resources development.

7.1 Stakeholders and Duties

The contributors to the development of the sector can be basically differentiated as the public sector, the private sector, NGO's and the regional population. The major roles associated with each contributor are as follows:

7.1.1 Public Sector

Turkish public sector administrative structure defines two basic groups of administrations; i.e. the central government and local administrations. The central government has local (regional and provincial) offices as well. Local administrations, on the other hand, are the municipalities, village administrations and special provincial administrations.

7.1.1.1 Central Government Agencies

The main agencies of the central government with respect to the Project are the Prime Ministry State Planning Organization (SPO) and the Ministry of Culture and Tourism.

Prime Ministry State Planning Organization (SPO)

SPO is a central planning agency under the Prime Ministry. SPO is responsible from the preparation of Five Year Development Plans and through these Plans formulates the policies and strategies for economic, social and spatial development of the country as well as forecasting the rate of development and laying down the objectives and principles of implementation. SPO, under the main guidance of the Five Year Development Plan approved by the National Assembly, prepares the Annual Investment Programs and allocates resources for the public sector investments. For private sector, the main function of SPO is its recommendations and guidance in order to reach the objectives of the Plan.

The development policies, principles, objectives and forecasts of the Plan are prepared jointly by SPO and responsible public agencies. For example, the policies, principles, objectives and forecasts with regard to the tourism sector are the products of joint efforts by SPO and The Ministry of Culture and Tourism integrating the views of other public sector agencies as well.

The recommendations and proposals of this Study should be reviewed within the context outlined above. In the case of acceptance and approval, public sector investment programs will reflect the recommendations of this Study. Since SPO is the major public agency responsible for the preparation of Annual Investment Programs, it has a strategic role in the process of realization of the recommendations and proposals of the Study.

Ministry of Culture and Tourism

Ministry of Culture and Tourism is the main responsible public agency in terms of tourism sector. The Ministry prepares the tourism development policies in accordance with the provisions of the Five Year Development Plans and guides and supervises the main actors within the sector. The main functions, in accordance with the Ministry's duties and responsibilities are allocation of sectorial resources, declaration of tourism centers, preparation and approval of development plans for these centers, allocating land to investors, supervising and directing the activities of tourism promotion and marketing, managing the physical inventory, branding the types and facilities of tourism, issuing licenses to these and supervision of these, provision of training in tourism and development of human resources the sector needs. Cultural activities are an inseparable part of tourism activities. Thus, the Ministry's roles and responsibilities in cultural activities carry importance for the development of the tourism sector. Furthermore, the Ministry is authorized to declare areas for archeological, historical urban and natural preservation areas, to take the measures for preservation and to determine their types of use. This authority extends to the approval process of the development plans for these areas and tourism centers.

Thus, the Ministry will ensure the realization of the policies and strategies proposed in this Study. It will manage and supervise the plan implementation as the central government agency. The inclusion of plan proposals in annual investment programs, provision of required legal framework and guidance to the private sector will be the main functions of the Ministry in terms of the Project.

Other Central Government Agencies

The complex structure of the sector necessitates contribution from a wide range of different central government agencies In order for the sector to develop properly. For example, the Ministry of Environment and Forestry is important due the existence of endemic flora, forests and areas for environmental protection.

The needs of the sector with regard to transport and infrastructure are met with the programmed investments of the agencies under the ministries of Reconstruction and Resettlement, Transport and Agriculture and Village Affairs. The roles and responsibilities of these agencies will continue during the next term.

Ministry of Interior Affairs is one of the agencies with regard to the institutionalization of the sector. The process for the approval for the "unions of local authorities" recommended in this Study is within the domain of this Ministry.

Respective ministries deal with their respective roles and responsibilities in terms of training, human resources development, health and similar social necessities.

The planning activities being undertaken by the Ministry of Environment and Forestry are expected to be completed soon. On the other hand, urban infrastructural investments will continue to be undertaken by the Bank of Provinces.

Besides their central roles in general administration, monitoring, supervision, guidance, planning and approval, these central agencies undertake their functions in the regions and provinces through their local offices.

7.1.1.2 Local Administrations

Local administrations are amongst the most important service providers within the sector. The municipalities in urban areas and village administrations in rural areas are the main providers for transport, infrastructural and socio-cultural services in their respective areas. Besides these, Special Provincial Administrations, at the level of province, provide services for urban and rural areas.

Municipalities are local administrations established under the provisions of the Law no. 1580. They have a wide range of tasks. Many needs and services required by the tourism sector, ranging from provision of infrastructure to construction of the tourism facilities, from promotional activities to the supervision of service quality are within the domain of responsibilities of the municipalities.

In this respect, there exists a very close relationship between the tourism sector and municipal services. In the coming term, the success of the sector will be contingent upon the success of the local administrations, especially the municipalities.

Village Administrations The functions of the village administrations is not as complex as the municipalities. The Village Law numbered 442 has provisions with respect to roads, water supply, waste water collection and discharge, etc. The Reconstruction Act numbered 3194 provides the rules for supervision of construction in rural areas. The head of the village administration is the “Muhtar” (the village administrator).

The rural settlements have potentials especially in terms of green and eco-tourism. Thus, the governorates should be active in the preparation of the relative development plans recommended for the rural settlements (especially at higher altitudes) that have high potential for development.

The recommended Eastern Black Sea Region Union of Local Authorities for Tourism Development and Infrastructure Provision is expected to undertake important functions in this respect.

Provincial Special Administrations are local administrations that are also involved in investing in tourism sector. These administrations, under the Act numbered 3360, are responsible from the construction of roads, bridges and other construction activities within the province. The administrations have other responsibilities and duties in other fields as well. These include investments in agriculture, industry and services, organization of cultural affairs, supporting education and training activities, etc.

It is expected that, through the new legislative framework to be enacted, these administrations’ contribution to the tourism sector will increase. This increase will be in the fields of improvement of rural roads, education, and increasing the quality of life in rural areas. The joint projects with the private sector in tourism development are also expected to be realized.

7.1.2 Private Sector

Private sector is the most organized and dynamic stakeholder in tourism with its functions as the investor and the operator. The duties of the private sector cover investment, operation, promotion, marketing and partially education and training.

It is expected that the private sector will continue with its role as the main investor and operator in the sector. Sharing of costs for those services provided by the public sector, partial investments in infrastructure and comprehensive investments in on-site infrastructure are within the domain of the private sector.

It is a precondition that private sector enters into partnerships with the public sector. It is recommended that private sector enter into agreements concerning investments and operation with the proposed Union of Local Authorities.

7.1.3 Non Governmental Organizations (NGO's)

The functions of NGO's as guidance and supervision are indisputable. NGO's in the sector are organized as foundations, associations and similar entities.

NGO's also contribute to other sectors that are not directly connected with tourism such as development of urban life, environmental issues, etc.

These organizations are expected to assume major responsibilities and roles in the development of regional tourism. Their primary function will be monitoring and supervision in the name of the public.

7.1.4 Regional Population

The regional population is a contributing stakeholder in terms of creation of the regional image, preserving the natural and cultural assets that create this image and securing visitors' satisfaction.

The precondition is that the regional population should be supportive of tourism. It is the regional population's duty to preserve and promote the assets for tourism and the population is expected to support all activities concerned with appropriate development of tourism.

7.2 Recommended Institutional Framework and Capacity Increase

The internal complexity and interrelations with other sectors increase the need for proper institutionalization within the sector. After all, the products subject to tourism are distributed in space without reference to administrative boundaries. This situation requires cooperation and coordination between different administrative units.

A second important issue is that private – public sector partnerships is a basic necessity for the development of tourism and this requires proper institutionalization.

7.2.1 Associations and Cooperatives

Associations and cooperatives appear as the easiest solutions amongst different models. This model is recommended to be established by local stakeholders based on settlement until where tourism developments are expected to take place.

The associations follow the interest of their members and implement sectorial auto-control mechanisms. Cooperatives, on the other hand, will be useful in procuring the goods and services required by the sector and in marketing of especially boarding houses in the plateaus.

7.2.2 Establishing Eastern Black Sea Union of Local Administrations for Tourism Development and Infrastructure Provision

An important step for the sector in the next term is the establishment of the Eastern Black Sea Union of Local Administrations for Tourism Development and Infrastructure Provision to provide services at the regional scale. In accordance with the current legislative framework,

this model is the only appropriate model that enables cooperation amongst different stakeholders with different status in the Region.

This Union can be established in accordance with the provisions of the Article 133 of the Law numbered 1580. This article states that municipalities, village administrations and special provincial administrations can establish of Union of Local Administrations for purposes of providing local services. In this case, member local administrations will transfer all or part of their responsibilities with respect to tourism sector to this Union.

The Law states that in order to establish a union local administrations, the respective boards of founding members (Municipal Councils in municipalities, Village Elderly Councils in villages and Provincial General Councils in special provincial administrations) should give a decision for the establishment of such a union. These decisions (or rules) are to be presented to the Ministry of Interior Affairs by governorates and after the approval of the Ministry; the Council of Ministers give the final approval. When this final approval is printed in the Official Gazette, the Union is ready to be established.

The Union Council is the authorized decision taking entity within the Union. Executive entities are Executive Committee and the President of the Union. The president is to be appointed amongst the governors of the provinces represented in the Union.

The representatives in the Union Council are as follows:

- i. Representatives from Special Provincial Administration(s),
- ii. Representatives from member municipalities,
- iii. Representatives from Village Administrations.

There are representatives of other agencies in the Union as observers. For example, the directors of Provincial Directorates of Culture and Tourism, directors of Provincial Directorates of Environment and Forestry and representatives from other public local agencies can participate in the meetings of the Union Council as observers. Similarly, representatives from private sector and NGO's can also be observes.

The Union will serve as an important regional platform that brings together the local administrations. The central government is also represented through the governor acting as the Union President. This further increases the importance of the union of local administrations.

The unions are legal entities with all the powers of its members. The Union Regulations state the areas of activity. In this respect the Union can assume roles and responsibilities in areas that carry importance for the Region, such as;

- i. Product development and research into feasibility of product development,
- ii. Promotion – creation of the Regional image, advices to other members in terms of creating this image,
- iii. Marketing – relationships with tour operators and travel agencies,
- iv. Preparation of Area Management Plans in areas depicted by the Tourism Development Plan,
- v. Decisions with respect to tourism investments and programming these investments,
- vi. Advice and guidance to the private sector on issues of decisions on sectorial development,
- vii. Monitoring progress and assuming responsibilities in other similar issues., and
- viii. Establishing joint partnerships with the private sector.

In this model, private sector and NGO's have representatives as observers only. It is expected that under the new legislation for public administration and local administrative agencies, their roles as participatory entities with legal rights and responsibilities will be ensured. More effective relationships and cooperation between the private sector and the Union can be achieved through the joint establishment of commercial firms.

7.2.3 Infrastructure on the Tourism Development Corridors and Local Unions for Tourism

Similar institutional arrangements can be established amongst the local administrations located within the tourism development corridors as proposed, especially in the fields of infrastructure and tourism.

According to the Law on Municipalities, a municipality can be a member of more than one union. These local unions can be established under the same legislative framework similar to the union at the regional scale.

There are 14 tourism development corridors proposed by the Study. These corridors have geographical integrity. There are many local administrations at different levels of legal status on these corridors. These usually use the same road, same water supply and dispose wastes into the same environment.

It is recommended that these local administrations should establish lower level (local) unions for infrastructure provision and tourism development.

7.2.4 Public – Private Sector Partnership

Public – private sector partnerships is a must for the development of the sector. Especially, partnerships through establishment of joint commercial entities (balancing the profit motive of the private sector by the public good objective of the public sector) in the fields of infrastructure management, procurement of good and services as inputs and service provision will benefit the sector. In this respect, it is recommended that unions of local administrations to establish commercial firms in partnership with private sector. These have examples in other regions of Turkey and it is evident that such endeavors will positively influence the development of regional tourism especially in investments.

7.3 The Need to Develop Human Resources

The complexity of the sector requires educated and trained human resources. This in turn necessitates programs both in formal education and in mass education

7.3.1 Formal Education

Formal education is provided by higher and middle educational facilities higher educational facilities are:

- i. Tourism and Commerce Faculties of different Universities or Tourism Management Faculties or International Relations Departments that are indirectly concerned with tourism..
- ii. Furthermore, there are two-year Tourism Profession Schools of the major universities.

Middle educational facilities are on the other hand Anatolian Tourism Schools, Cooking Professional Schools, etc.

Trabzon Tourism Professional School is located within the Black Sea Technical University in Trabzon. Other schools are expected to be established in the future.

7.3.2 Mass Education

This type of education is of top priority. On the job training, increase in professional capabilities and utilization of formal education opportunities are required.

It is recommended that these programs should be initiated by different public agencies and NGO's. In this respect;

- i. The activities and programs of Ministry of Culture and Tourism General Directorate of Tourism Education (TUREM) should be extended into regional provinces.
- ii. Local authorities should establish courses for professional training,
- iii. Tourism education should be included in Environmental Awareness Programs organized by the Ministry of Environment and Forestry,
- iv. Public (Communal) Training Centers should address issues of tourism,
- v. Local products should be supported by Ministry of Agriculture and Village Affairs through programs for improving the production of local goods such as dairy products, meat products, etc.

It will be appropriate that mass tourism, once in place, should be under the domain of the proposed Unions of local authorities. Programs to create pioneering tourism entrepreneurs will be one of the major activities of these Unions.

The Unions can also establish "Society and Women Development Programs" to increase the level of participation of the female population in tourism activities. Other similar programs, geared towards the well being of the population can also be organized by the Unions.

NGO's are also expected to organize promotional and human resources development programs. Lastly, the private sector is also expected to organize in-firm programs geared towards on the job training and professional development.

7.4 Goals Achievement Matrix

In view of the above stated different stakeholders and their roles and responsibilities as well as development strategies envisioned in the Study, The Action Plan can be summarized as a "Goals Achievement Matrix" provided below.

8. High Priority Measures

As referred to in many instances in the Report, the tourism sector has relationships with many other sectors. Furthermore, the sector has a complicated structure in itself. Solidarity and coordination between the sector partners is a major requirement.

This necessitates a high level of organization for the sector. Introduction of new organizations to gather the sector partners together is a must.

On the other hand, a high level of skill and expert is required for a quality service supply. Quick steps should be taken in these two respects to enable the sector to make the envisaged onsets.

8.1 Preparations to Establish East Black Sea Region Tourism Development Union

It is proposed to start urgently preparations for founding an East Black Sea Region Tourism Development Union covering all the Regional provinces or a similar formation under a different name. In addition, opportunities for local administrations taking place on the

proposed Tourism Corridors to organize local unions in their sub-geography should be dwelt on. In such case, a distinction should be made between the jurisdictions of the proposed East Black Sea Region Tourism Development Union and other local unions.

Cooperation of local administrations towards a target and use of their possibilities jointly are also included in the bills that re-organize local administrations.

In this context, efforts must be taken to assess legal and social possibilities regarding the issues above, seek opportunities for cooperation in various areas and, consequently, pave the ground for founding a Union. Such efforts should also address the information of local administrators and the inducement of them to develop interest in this issue, the identification of local administration units eligible for becoming a member of the Union, the contribution of NGO's to and their level of participation in such new formations and other similar issues.

8.2 Tourism Pioneers and Women Training and Support Programs

A major part of the kinds of tourism proposed under this development study will be developing on tourism axes and in the countryside. In this case, the motivation of those who live in areas which have not yet met with the tourism activities comes to the foreground. On the other hand, the women might provide undeniable contributions to the sectoral development. The training of women should be emphasized for purposes of the creation of an image of the Region, the incorporation of traditional assets in the sector and the improvement of service supply quality. With the trained womanpower, the women's income and wealth will increase and their status in the society will rise.

For these reasons, in areas where tourism could develop and particularly in rural communities, persons selected from among volunteers should be provided with training to develop pioneer tourism people. Similar programs should be provided for training women, starting firstly in areas having a high tourism potential. Through such programs, the participators' level of skill should be improved and they should be supported with vocational courses to participate in economic activities. Such programs should particularly be organized by the civilian initiatives in the private sector. One of the major duties of the proposed East Black Sea Region Tourism Union should be to accomplish such programs.

Action Plan – Goals Achievement Matrix

Strategies	Stakeholders That Will Contribute To the Development of The Sector					
	Central Government (1)	Local Authorities (2)	Union of Local Authorities (3)	Private Sector (4)	NGO's (5)	Regional Population (6)
Creation of Eastern Black Sea Regional Image (Strategy: 1)	<ul style="list-style-type: none"> Using the image in national and regional promotional programs, Scientific research and publishing 	<ul style="list-style-type: none"> Utilizing local special days to further develop the image, Organization and promotion of festivals 	<ul style="list-style-type: none"> Utilizing local special days to further develop the image, Utilization of internet opportunities 	<ul style="list-style-type: none"> Giving priority to the regional image in all promotion, marketing and service provision activities 	<ul style="list-style-type: none"> Supporting the organization and promotion of the Utilization of internet opportunities Cooperation with similar tourism NGO's in foreign countries 	<ul style="list-style-type: none"> Preserve traditional assets of the Region and offer tolerance and hospitality Present documents to facilitate image creation
Increase in Visitor Satisfaction (Strategy: 2)	<ul style="list-style-type: none"> Engage in activities of regional promotion and information dissemination, Supervision of facilities and service quality 	<ul style="list-style-type: none"> Engage in activities of local promotion and information dissemination Provision of Transport and Infrastructure and proper operation Provision of social amenities and proper operation Supervision of facilities and service quality 	<ul style="list-style-type: none"> Engage in activities of regional promotion and information dissemination, Provision of infrastructure and operation Provision of social amenities and proper operation 	<ul style="list-style-type: none"> Engage in activities of local promotion and information dissemination Contribute to provision of infrastructure and operation Contribute to provision of social amenities and proper operation 	<ul style="list-style-type: none"> Supervision of local facilities and service quality 	<ul style="list-style-type: none"> Preserve traditional assets of the Region and offer tolerance and hospitality Contribute to increased visitor satisfaction in a feeling of belongingness
Increase in Cooperation Between Tour Operators and Sectorial Stakeholders (Strategy: 3)	<ul style="list-style-type: none"> Provision of appropriate favorable investment environment for foreign investors Participating in fairs 	<ul style="list-style-type: none"> Participating in fairs, Utilization of internet opportunities to promote the settlement 	<ul style="list-style-type: none"> Supporting the activities of foreign tour operators Participating in fairs 	<ul style="list-style-type: none"> Establishing partnerships with foreign operators, Participating in fairs 	<ul style="list-style-type: none"> Cooperation with similar tourism NGO's in foreign countries 	<ul style="list-style-type: none"> Contribute to programs of tour operators in a feeling of belongingness

(1) Central government agencies and their respective local offices.

(2) The village and special provincial administrations.

(3)The Union of Local Authorities (Special Provincial Adm. and Municipalities) for tourism development and infrastructure provision.

(4) Companies and legal entities and private individuals established under the Turkish Commercial Act.

(5) Associations, foundations, professional chambers and other NGO'S.

(6) Inhabitants of urban and rural settlements.

Action Plan – Goals Achievement Matrix

Strategies	Stakeholders That Will Contribute To the Development of The Sector					
	Public Sector			Private Sector (4)	NGO's (5)	Regional Population (6)
	Central Government (1)	Local Authorities (2)	Union of Local Authorities (3)			
Establishment of Tourism Development Corridors (Strategy: 4)	<ul style="list-style-type: none"> Establishing regional scale transport and infrastructural systems, Plan making and approval (Min. Of Recons. And Resettlement) Establishing the Unions proposed 	<ul style="list-style-type: none"> Provision of Infrastructure and proper operation Provision of social amenities and proper operation, Contribution to product differentiation activities Establishing the Unions proposed and/or being their member Plan making and approval at appropriate scales 	<ul style="list-style-type: none"> Provision of Infrastructure and proper operation Provision of social amenities and proper operation Contribution to product differentiation activities 	<ul style="list-style-type: none"> Undertaking feasible investments, Establishing partnerships with the public sector Undertaking investments for improved facilities and service quality, 	<ul style="list-style-type: none"> Cooperation with other NGO's of the settlements on the Designing and implementing programs for on the job training a training for women 	<ul style="list-style-type: none"> Provide support to association and civilian initiative formation actions Participate in training programs
Creation of New Tourism Types (Strategy: 5)	<ul style="list-style-type: none"> Establishment of sub-regional scale transport and infrastructural systems Plan making and approval (Min. Of Recons. And Resettlement) Preparation of Area Management Plans (Min. Of Environment and Forestry) 	<ul style="list-style-type: none"> Provision of local Infrastructure and proper operation Priority to the areas where new types of tourism are expected to develop, Plan making and approval at appropriate scales 	<ul style="list-style-type: none"> Provision of local Infrastructure and proper operation Priority to the areas where new types of tourism are expected to develop, Plan making and approval at appropriate scales 	<ul style="list-style-type: none"> Contribution to the provision and operation of local scale transport and infrastructural investments, Undertaking investments required for the new types of tourism, development of boarding house concept and other similar issues 	<ul style="list-style-type: none"> Preparing programs for the right motivation of the people. Designing and implementing programs for environmental issues and tourism as well as women targeted programs, Contribution to Area Management Plans 	<ul style="list-style-type: none"> Provide support to association and civilian initiative formation actions Participate in training programs

(1) Central government agencies and their respective local offices.

(2) The village and special provincial administrations.

(3) The Union of Local Authorities (Special Provincial Adm. and Municipalities) for tourism development and infrastructure provision.

(4) Companies and legal entities and private individuals established under the Turkish Commercial Act.

(5) Associations, foundations, professional chambers and other NGO'S.

(6) Inhabitants of urban and rural settlements.

Eastern Black Sea Region Tourism Development Study

Steering Committee Members

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