



Republic of Turkey
Prime Ministry
Undersecretariat of
State Planning Organization



Japan
International Cooperation Agency
JICA

Eastern Black Sea Region Tourism Development Study

VOLUME I

FINAL REPORT

February 2004, Ankara

BELDA LTD - Belde Proje DanıŐmanlık ve Ticaret Ltd. Őti.
and
Semor - Seminer Organizasyon DanıŐmanlık ve Turizm A.Ő

EASTERN BLACK SEA REGION TOURISM DEVELOPMENT STUDY

“Final Report”

Contents:

| | <u>Page Number</u> |
|--|--------------------|
| 1. Introduction..... | 5 |
| 1.1 Study Goal..... | 5 |
| 1.2 Study Organization..... | 5 |
| 1.3 Phases of the Study and Reporting | 5 |
| 2 The Demand Structure | 6 |
| 2.1 Arrivals to the Region – Domestic and Foreign Visitors..... | 6 |
| 2.1.1 Accommodation Facilities and Capacities | 11 |
| 2.1.2 Distribution of Visitors According To Nationalities | 13 |
| 2.1.3 Main Attributes of the Visits | 13 |
| 2.1.3.1 Trends in Visitors’ Spending | 14 |
| 2.1.4 New and Alternative Tourism..... | 14 |
| 2.2 Tours Organized in the Region | 16 |
| 2.2.1. The Tours’ Point of Entry to the Region and Modes of Transport | 17 |
| 2.2.2 Important Routes for Tours and Points of Overnight Stays | 17 |
| 2.2.3 Areas of Attraction – Important Points of Destination and Interim Stations..... | 19 |
| 2.2.4 The Views and Recommendations of Travel Agencies With Respect To Tourism Development | 19 |
| 2.3 Tourist Inquiry Results..... | 20 |
| 2.3.1 Individual Visits and Visits by Tours..... | 20 |
| 2.3.2 Expectations and Levels of Satisfaction of the Visitors | 21 |
| 2.3.3 The Opinions of the Visitors for the Development of Tourism Sector and for the Increase of Attractiveness of the Region | 21 |
| 2.3.4 General View of the Region According to the Visitors | 22 |
| 2.4 The Evaluation of Tourism Sector In Terms of Expectations | 22 |
| 2.4.1 Developing the Region as an Arrival Area | 22 |
| 2.4.2 Developing the Tours to the Region | 23 |
| 2.4.3 Increasing the Individual Visits..... | 23 |
| 3 The Supply Side of Regional Tourism..... | 23 |
| 3.1 Natural Assets to Be Mobilized | 23 |
| 3.1.1 Mountains, Forest and Rivers | 24 |
| 3.1.2 Climatic Conditions – Four Seasons | 25 |
| 3.1.3 Flora and Fauna | 25 |
| 3.1.3.1 Flora | 25 |
| 3.1.3.2 Fauna | 26 |
| 3.2 Cultural and Historical Assets | 26 |
| 3.2.1 Traditional Way of Living (on process)..... | 26 |
| 3.2.2 Folklore and Traditional Dance and Music (on process) | 27 |
| 3.2.3 History and Historical Assets | 28 |
| 3.3 Systems of Transport and Accessibility | 30 |
| 3.3.1 Access to Rural Areas..... | 30 |
| 3.4 Results of Stakeholders Meetings..... | 31 |
| 3.4.1 Definition of Areas with High Tourism Potential..... | 31 |
| 3.4.2 Marketing Methods..... | 31 |
| 3.4.3 Strengthening the Institutional Framework and Increasing the Institutional Capacities | 32 |
| 3.4.4 The Need to Develop Human Resources | 32 |
| 3.5 Evaluation of Tourism Supply and Recommendations | 32 |
| 3.5.1 Product Development and Creation of the Product Image | 32 |
| 3.5.2 Product Marketing | 32 |
| 3.5.3 Institutionalization..... | 33 |

| | |
|---|----|
| 3.5.4 Development of Human Resources | 33 |
| 4. Proposed Tourism Development of the Region | 33 |
| 4.1 Tourism Development Policy and Strategies | 34 |
| 4.1.1 Tourism Development Strategies..... | 34 |
| 4.1.1.1 To Use Tourism Sector As a Means For Regional Economic Development (Policy:1)..... | 34 |
| 4.1.1.1.1 To Invite Investments From Outside (Sub-Policy: 1.1) | 37 |
| 4.1.1.1.2 Opening New Markets for Regional Tourism Products (Sub-Policy: 1.2)..... | 37 |
| 4.1.1.1.2.1 To Invite People From Outside - New Markets For Regional Tourism Products.... | 38 |
| 4.1.1.1.2.2 Participation in National and International Tourism Fairs | 39 |
| 4.1.1.1.2.3 Contemporary Measures for Promotion and Marketing, e-tourism Possibilities..... | 40 |
| 4.1.1.1.3 to Increase Tourism Demand to Region (Sub-policy: 1.3)..... | 40 |
| 4.1.1.1.4 to Use Size and Diversity of Region As Means To Reach Different Target Groups (Sub-policy: 1.4) | 40 |
| 4.1.1.1.4.1 Integrated Tourism Operations with Adjacent Regions | 41 |
| 4.1.1.1.4.2 Integrated Tourism Operations with Adjacent Countries | 42 |
| 4.1.1.1.4.3 to Increase Public and Private Partnership and Solidarity Between Stakeholders | 42 |
| 4.1.1.2 Considering Tourism as a Regional-Income Increasing Activity and Using Local Initiatives for Its Development (Policy 2)..... | 43 |
| 4.1.1.2.1 Improving and Institutionalizing Local Initiatives (Sub-Policy: 2.1) | 43 |
| 4.1.1.2.2 Phased Scheduling of Investments (Policy 2.2)..... | 44 |
| 4.1.1.2.3 Urging Private Sector Contribution to Investments (Policy: 2.3)..... | 45 |
| 4.1.2 Development Strategies..... | 45 |
| 4.1.2.2 Satisfaction of Tourist Needs (Strategy: 2) | 46 |
| 4.1.2.3 Cooperation with Tour Agents (Strategy: 3)..... | 47 |
| 4.1.2.4 Diversification of Tourism Products (Sub-policy 1.4) | 48 |
| 4.1.2.4.1 Coastal Corridor 1 | 49 |
| 4.1.2.4.2 Ordu South Corridor 1:..... | 50 |
| 4.1.2.4.3 Ordu South Corridor 2..... | 52 |
| 4.1.2.4.4 Coastal Corridor 2 | 55 |
| 4.1.2.4.5 Giresun South Corridor | 56 |
| 4.1.2.4.6 Coastal Corridor 3..... | 60 |
| 4.1.2.4.7 Trabzon South 1 – Gümüşhane Corridor..... | 61 |
| 4.1.2.4.8 Trabzon South Corridor 2..... | 63 |
| 4.1.2.4.9 Trabzon South Corridor 3..... | 64 |
| 4.1.2.4.10 Coastal Corridor 4 | 67 |
| 4.1.2.4.11 Rize South Corridor 1..... | 67 |
| 4.1.2.4.12 Rize South Corridor 2..... | 69 |
| 4.1.2.4.13 Coastal Corridor 5 | 72 |
| 4.1.2.4.14 Artvin South Corridor 1..... | 73 |
| 4.1.2.4.15. Recommendations for the Marketing of the Corridors | 77 |
| 4.1.2.4.16 Necessary Institutional Regulations and Motivation Programs for Tourism Corridors | 77 |
| 4.1.2.4.17 Environmental and Tourism Training Programs for Tourism Corridors | 77 |
| 4.1.2.5 Creating New Types of Tourism (Strategy 5)..... | 78 |
| 4.1.2.5.1 Types of Tourism That Offer Special Products – Green Tourism..... | 78 |
| 4.1.2.5.1.1 Program 1 - Traditional Upland Lifestyle..... | 79 |
| 4.1.2.5.1.2 Program 2 - Farm Tourism..... | 79 |
| 4.1.2.5.1.3 Program 3 – Use of Features Peculiar to the Region - Fishing | 79 |
| 4.1.2.5.2 Eco-tourism | 81 |
| 4.1.2.5.3 Social and Ethnographic Tourism | 85 |
| 4.1.2.5.4 Institutional Arrangements and Motivation Programs That Must Be Implemented in New Tourism Areas..... | 86 |
| 4.1.2.5.5 Environmental and Tourism Programs for Local People | 86 |
| 5 Plan of Actions | 87 |
| 5.1 Basic Characteristics of the Region, Policies, Strategies and Stakeholders of the Sector..... | 87 |
| 5.2 Stakeholders and Responsibilities | 89 |
| 5.2.1 The Public Sector..... | 89 |
| 5.2.1.1 Central Government Agencies..... | 89 |

| | |
|---|-----|
| 5.2.1.1.1 Prime Ministry State Planning Organization (SPO) | 89 |
| 5.2.1.1.2 Ministry of Culture and Tourism | 90 |
| 5.2.1.1.3 Other Central Government Agencies | 90 |
| 5.2.1.2 Local Administrations | 91 |
| 5.2.1.2.1 Municipalities and Village Administrations | 91 |
| 5.2.1.2.2 Special Provincial Administrations | 92 |
| 5.2.2 Private Sector | 92 |
| 5.2.3 Non- Governmental Organizations | 92 |
| 5.2.4 People of the Region | 92 |
| 5.3 Institutional Development and Capacity Increase | 93 |
| 5.3.1 Associations and Cooperatives | 93 |
| 5.3.2 Establishing East Black Sea Region Local Tourism Development Administrations Union . | 93 |
| 5.3.2.1 Infrastructure and Tourism Development Local Governments Unions within Tourism Development Corridors | 94 |
| 5.3.3 Public – Private Sector Partnership | 95 |
| 5.4 The Need for Education and Human Resources Development Programs | 95 |
| 5.4.1 Formal Education | 95 |
| 5.4.2 Vocational Education | 95 |
| 5.5 Action Plan in View of Strategies and Major Partners | 97 |
| 5.5.1 The State Planning Organization | 97 |
| 5.5.2 The Ministry of Culture and Tourism | 97 |
| 5.5.3 Other Central Administrative Agencies | 97 |
| 5.5.4 Local Administrations | 98 |
| 5.5.4.1 Municipalities and Village Administrations | 98 |
| 5.5.4.2 Special Provincial Administrations | 99 |
| 5.5.5 East Black Sea Region Tourism Development Local Administrations Union and Other Unions | 99 |
| 5.5.6 Private Sector | 100 |
| 5.5.7 Non-Governmental Organizations | 100 |
| 5.5.8 People of the Region | 100 |
| 5.5.9 Goal Achievement Matrix | 100 |
| 6. High Priority Measures | 101 |
| 6.1 Preparations to Establish East Black Sea Region Tourism Development Union | 101 |
| 6.2 Tourism Pioneers and Women Training and Support Programs | 101 |

Tables:

| | |
|--|----|
| Table 1: Arrivals, Overnight Stays and Average Period of Stay on Tourism Operation Licensed Accommodation Facilities (2002) | 7 |
| Table 2: Arrivals, Overnight Stays and Average Period of Stay on Municipality Licensed Accommodation Facilities (2002) | 7 |
| Table 3: Arrivals, Overnight Stays and Average Period of Stay at Ministry and Municipality Licensed Accommodation Facilities (2002) | 7 |
| Table 4: The Share of Domestic and Foreign Visitors within the Total Arrivals and Overnight Stays in Ministry Licensed Accommodation Facilities (2000 – 2002) | 8 |
| Table 5: The Share of Domestic and Foreign Visitors within the Total Arrivals and Overnight Stays in Municipal Licensed Accommodation Facilities (2000 – 2002) | 8 |
| Table 6: The Share of Domestic and Foreign Visitors within the Total Arrivals and Overnight Stays in Ministry and Municipal Licensed Accommodation Facilities (2000 – 2002) | 9 |
| Table 7: Number of Arrivals to Accommodation Facilities in the Region and in Turkey (1996 – 2002) | 9 |
| Table 8: Number of Overnight Stays in the Accommodation Facilities in the Region and in Turkey (1996 –2002) | 10 |

| | |
|--|----|
| Table 9: Distribution of Number of Beds of Ministry and Municipal Licensed Accommodation Facilities (2002) | 12 |
| Table 10: Number of Beds in Accommodation Facilities in the Region and in Turkey | 12 |
| Table 11: Overnight Stays and Occupancy Rates for Ministry and Municipal Licensed Accommodation Facilities (2000-2002) | 14 |
| Table 12: Arrivals, Overnight Stays and Bed Capacities of Ministry Licensed Facilities at Different Tourism Attraction Locations (2002) | 15 |
| Table 13: The Share (%) of Arrivals, Overnight Stays and Bed Capacities of Ministry Licensed Facilities at Different Tourism Attraction Locations (2002) | 15 |
| Table 14: Share of Tourism Receipts in the Gross National Product (by Current Consumer Prices) | 34 |
| Table 15: Rate of Tourism Receipts in the Export Earnings and Tourism Expenditure in the Export Expenses (million US \$)..... | 35 |
| Table 16: Sectoral Regional Employment in the Period 1970-2000..... | 36 |

Figures:

| | |
|---|----|
| Figure 1: Growth Rates for the Number of Arrivals to the Accommodation Facilities (1996-2002) | 10 |
| Figure 2: Growth Rates for the Number of Overnight Stays in the Accommodation Facilities (1996-2002)..... | 10 |
| Figure 3: Growth Rates of Number of Beds in Ministry and Municipal Registered Facilities (1996-2002)..... | 12 |

Maps:

| | |
|--|----|
| Map 1: Ordu Tourism Development Corridors | 54 |
| Map 2: Giresun Tourism Development Corridors..... | 59 |
| Map 3: Trabzon-Gümüşhane Tourism Development Corridors | 66 |
| Map 4: Rize Tourism Development Corridors | 71 |
| Map 5: Artvin Tourism Development Corridors | 76 |
| Map 6: Mountain Kaçkar Trekking Routes And Camping Sites | 84 |

EASTERN BLACK SEA REGION TOURISM DEVELOPMENT STUDY

“Final Report”

1. Introduction

The Development Study for the Development of Tourism in the East Black Sea Region was accomplished under a protocol made between the Prime Ministerial Undersecretariat for the State Planning Organization (DPT) and the Japan International Cooperation Agency (JICA). The study aims at a development to secure the most increased income with the least investment and targets regional development, giving weight to the tourism sector. The study was carried out under a work programme which included, briefly, the collection of data for the tourism sector in the East Black Sea Region and the review of its development; the development of the types of tourism that are based on natural and cultural assets; the search of eco-tourism opportunities, also including the organizational aspect; the formulation of a participations approach for the development of upland tourism; the identification of bottlenecks that obstacle the onset of tourism sector and of actions that must be taken to eliminate them; the identification of tourism development corridors and areas, also considering the opportunities available in neighboring countries, to attract more domestic and foreign visitors to the Region.

1.1 Study Goal

The main goal of the Study is to facilitate the development of the tourism sector with a special emphasis on eco-tourism in the provinces of Ordu, Giresun, Trabzon, Gümüşhane, Rize and Artvin that are located within the Eastern Black Sea Region. In this respect, development of small scale agro-industry and handcrafts is also recommended as supportive sectors to tourism.

1.2 Study Organization

The Development Study is financed by Japanese International Cooperation Agency (JICA) and is coordinated by Prime Ministry State Planning Organization (DPT). All phases and the recommendations of the Study are reviewed and evaluated by the “Steering Committee” the members of which are representatives of related ministries, provincial directorates of culture and tourism and non-governmental organizations (Appendix A: Project Organization).

The Study is undertaken with a participatory approach. “Stakeholders Meetings” were held in all provinces with the attendance of all related parties in the sector. In these meetings the strengths, weaknesses, opportunities and threats related with regional tourism development were analyzed. The total number of attendants to these meetings in the six provinces was 325. Besides partners meetings, public awareness meetings were held in the provinces of Trabzon, Artvin and Rize with more that 250 participants and tourism training seminars were held in the provinces of Giresun and Rize. The active professionals as managers, investors or operators in the tourism sector of the six provinces were invited to these seminars. The total number of attendants to these seminars were 37.

1.3 Phases of the Study and Reporting

The Study comprises two distinct phases. The first phase studies include the analysis of the present situation of the tourism sector, review of the existing policies and strategies, review of the existing legal framework and statutory plans, undertaking surveys and interviews with the tourists, accommodation facilities and travel agencies and evaluation and assessment

of their results. The findings of these studies are presented and submitted as “Preliminary Interim Report” on September 19, 2003 and as “Interim Report” in October 2003.

The second phase includes the formulation of the sectoral development strategies, identification of main development axes and locations with respect to different geographical zones, estimation of the future quantitative values and sizes of the sector, identification of the measures for institutional development and formulation of detailed recommendations with respect to the development axes and locations. “Draft Final Report” submitted on December 2, 2003 addresses these issues.

2 The Demand Structure

Even though the Region historically has portrayed important potentials for the development of the tourism sector, actual developments commenced after mid ‘90’s. This development took place following the disintegration of the Soviet Union and emergence of incoming tourists from ex-soviet countries. The main objectives of these incoming tourists were business oriented and this influx has resulted in what is known 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. This situation is analyzed in detail below.

2.1 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. 18.4%, constituting 65,377 of these arrivals have been foreign visitors while the remaining 287,185 were domestic visitors.

As an addition to these, a total of 458,763 arrivals have been realized for the year 2002 in the accommodation facilities licensed by the municipality. 60,668 of these arrivals, constituting 13.2%, have been foreigners while 398,095, constituting the remaining 86.8% have been domestic visitors.

Thus a total of 811,325 arrivals have been realized in all accommodation facilities. The number of foreign arrivals constituting 15.6% thereof has been 126,045. Domestic arrivals have been 84.4% with 685,280 arrivals.

A total of 1,036,491 overnight stays have been realized in the accommodation facilities in the Region in 2002. The number of overnight stays of domestic is higher than that of foreign visitors. The domestic visitors realize 83% of the overnight stays, constituting 855,835 persons.

Table 1: Arrivals, Overnight Stays and Average Period of Stay on Tourism Operation Licensed Accommodation Facilities (2002)

| Provinces | No. of arrivals | | | Overnight Stays | | | No. Of Beds | Average Period of Stay | | | Occupancy (%) |
|------------|-----------------|----------|---------|-----------------|----------|----------|-------------|------------------------|----------|-------|---------------|
| | Foreign | Domestic | Total | Foreign | Domestic | Total | | Foreign | Domestic | Total | |
| Ordu | 1,943 | 53,771 | 55,714 | 3,114 | 70,185 | 73,299 | 634 | 1.6 | 1.3 | 1.3 | 26 |
| Giresun | 551 | 40,720 | 41,271 | 868 | 55,249 | 56,117 | 546 | 1.6 | 1.4 | 1.4 | 22 |
| Trabzon | 46,273 | 107,106 | 153,379 | 61,032 | 141,589 | 202,621 | 2,122 | 1.3 | 1.3 | 1.3 | 27 |
| Gümüşhane | 152 | 2,479 | 2,631 | 182 | 5,070 | 5,252 | 54 | 1.2 | 2.0 | 2.0 | 35 |
| Rize | 2,971 | 37,005 | 39,976 | 3,767 | 51,349 | 55,116 | 537 | 1.3 | 1.4 | 1.4 | 29 |
| Artvin | 13,487 | 46,104 | 59,591 | 21,674 | 59,637 | 81,311 | 655 | 1.6 | 1.3 | 1.4 | 35 |
| Region. | 65,377 | 287,185 | 352,562 | 90,637 | 383,079 | 473,716 | 4,548 | 1.4 | 1.3 | 1.3 | 29 |
| Region (%) | 1% | 4% | 2% | 0% | 3% | 1% | 1% | | | | |
| Turkey | 9,871,59 | 7,916,70 | 17,788, | 43,312,4 | 15,202,4 | 58,514,9 | 393,37 | 4.4 | 1.9 | 3.3 | 49 |

Source: Bulletin of Accommodation Statistics, Republic of Turkey, Ministry of Tourism, Ankara, 2002

Table 2: Arrivals, Overnight Stays and Average Period of Stay on Municipality Licensed Accommodation Facilities (2002)

| Provinces | No. of arrivals | | | Overnight Stays | | | No. Of Beds | Average Period of Stay | | | Occupancy (%) |
|------------|-----------------|-----------|------------|-----------------|------------|------------|-------------|------------------------|----------|-------|---------------|
| | Foreign | Domestic | Total | Foreign | Domestic | Total | | Foreign | Domestic | Total | |
| Ordu | 9,643 | 99,304 | 108,947 | 10,239 | 119,689 | 129,928 | 1,341 | 1.1 | 1.2 | 1.2 | 49 |
| Giresun | 99 | 18,743 | 18,842 | 148 | 22,798 | 22,946 | 756 | 1.5 | 1.2 | 1.2 | 13 |
| Trabzon | 25,965 | 122,805 | 148,770 | 35,847 | 131,410 | 167,257 | 5,211 | 1.4 | 1.1 | 1.1 | 15 |
| Gümüşhan | 97 | 16,289 | 16,386 | 332 | 27,516 | 27,848 | 257 | 3.4 | 1.7 | 1.7 | 33 |
| Rize | 10,516 | 94,693 | 105,209 | 12,663 | 99,268 | 111,931 | 3,006 | 1.2 | 1.0 | 1.1 | 14 |
| Artvin | 14,348 | 46,261 | 60,609 | 30,790 | 72,075 | 102,865 | 2,133 | 2.1 | 1.6 | 1.7 | 28 |
| Region. | 60,668 | 398,095 | 458,763 | 90,019 | 472,756 | 562,775 | 12,704 | 1.5 | 1.2 | 1.2 | 12 |
| Region (%) | 2% | 5% | 4% | 1% | 4% | 2% | 3% | | | | |
| Turkey | 3,249,837 | 8,456,432 | 11,706,269 | 9,901,035 | 13,028,808 | 22,929,843 | 408,005 | 3.0 | 1.5 | 2.0 | 15 |

Source: Bulletin of Municipality Registered Accommodation Statistics, Republic of Turkey, Ministry of Tourism, Ankara, 2002

Table 3: Arrivals, Overnight Stays and Average Period of Stay at Ministry and Municipality Licensed Accommodation Facilities (2002)

| Provinces | No. of arrivals | | | Overnight Stays | | | No. Of Beds | Average Period of Stay | | | Occupancy (%) |
|------------|-----------------|------------|------------|-----------------|------------|------------|-------------|------------------------|----------|-------|---------------|
| | Foreign | Domestic | Total | Foreign | Domestic | Total | | Foreign | Domestic | Total | |
| Ordu | 11,586 | 153,075 | 164,661 | 13,353 | 189,874 | 203,227 | 1,975 | 1.15 | 1.24 | 1.23 | 28 |
| Giresun | 650 | 59,463 | 60,113 | 1,016 | 78,047 | 79,063 | 1,302 | 1.56 | 1.31 | 1.32 | 17 |
| Trabzon | 72,238 | 229,911 | 302,149 | 96,879 | 272,999 | 369,878 | 7,333 | 1.34 | 1.19 | 1.22 | 14 |
| Gümüşhane | 249 | 18,768 | 19,017 | 514 | 32,586 | 33,100 | 311 | 2.06 | 1.74 | 1.74 | 29 |
| Rize | 13,487 | 131,698 | 145,185 | 16,430 | 150,617 | 167,047 | 3,543 | 1.22 | 1.14 | 1.15 | 13 |
| Artvin | 27,835 | 92,365 | 120,200 | 52,464 | 131,712 | 184,176 | 2,788 | 1.88 | 1.43 | 1.53 | 18 |
| Region. | 126,045 | 685,280 | 811,325 | 180,656 | 855,835 | 1,036,491 | 17,252 | 1.43 | 1.25 | 1.28 | 16 |
| Region (%) | 1% | 4% | 3% | 0% | 3% | 1% | 2% | 35% | 72% | 46% | 59 |
| Turkey | 13,121,431 | 16,373,138 | 29,494,569 | 53,213,533 | 28,231,253 | 81,444,786 | 801,379 | 4.06 | 1.72 | 2.76 | 28 |

Source: Bulletin of Accommodation Statistics (Ministry and Municipality Licensed), Republic of Turkey, Ministry of Tourism, Ankara, 2002

The number of overnight stays in the region is low. The average period of stay in municipality licensed facilities is 1.2 days, which is less than the average of 2 for Turkey as a whole. This period is 1.3 days in the Region and 3.3 in Turkey for the Ministry licensed facilities. The period of stay of the visitors is shorter than the national average.

A similar drop in performance is observed in terms of occupancy rates of the accommodation facilities. While the average occupancy rate in the Ministry licensed facilities in Turkey has been 49% in 2002; this has been realized as 29% in the Region. The average occupancy rates in municipal licensed facilities are 15% and 12%, respectively.

Foreigners constitute approximately 19% of total arrivals at tourism operation licensed facilities while 81 % are domestic visitors. This figure has not changed in the last three years. The number of foreign visitors has increased to 55% from 43% in the 2000-2002 period in Turkey. The relatively low number of arrivals to the Region requires careful consideration.

The structure of domestic visitor arrivals and overnight stays in the ministry licensed accommodation facilities of the Region did not show major changes during the period 2000 – 2002. This being so, there is a continuous increase in the share of domestic visitor arrivals and overnight stays as opposed to a continuous decline in the share of foreign arrivals and overnight stays. For example, the share of the domestic visitor arrivals and overnight stays within the total was 74% and 75% respectively for the year 2000 where as this share increased to 81% for both arrivals and overnight stays for the year 2002 (Table 4).

Table 4: The Share of Domestic and Foreign Visitors within the Total Arrivals and Overnight Stays in Ministry Licensed Accommodation Facilities (2000 – 2002)

| Years | | No. of arrivals | | | Overnight Stays | | | Percentages of Arrivals (%) | | | Percentages of Overnights (%) | | |
|-------|--------|-----------------|-----------|------------|-----------------|------------|------------|-----------------------------|----------|-------|-------------------------------|----------|-------|
| | | Foreign | Domestic | Total | Foreign | Domestic | Total | Foreign | Domestic | Total | Foreign | Domestic | Total |
| 2000 | Region | 107,369 | 298,321 | 405,690 | 127,213 | 386,677 | 513,890 | 26 | 74 | 100 | 25 | 75 | 100 |
| | Turkey | 6,804,076 | 8,855,902 | 15,659,978 | 28,510,906 | 16,475,699 | 44,986,605 | 43 | 57 | 100 | 63 | 37 | 100 |
| 2001 | Region | 55,859 | 235,710 | 291,569 | 73,001 | 311,137 | 384,138 | 19 | 81 | 100 | 19 | 81 | 100 |
| | Turkey | 8,778,165 | 7,749,622 | 16,527,787 | 36,368,500 | 14,178,389 | 50,546,889 | 53 | 47 | 100 | 72 | 28 | 100 |
| 2002 | Region | 65,377 | 287,185 | 352,562 | 90,637 | 383,079 | 473,716 | 19 | 81 | 100 | 19 | 81 | 100 |
| | Turkey | 9,871,594 | 7,916,706 | 17,788,300 | 43,312,498 | 15,202,445 | 58,514,943 | 55 | 45 | 100 | 74 | 26 | 100 |

Source: Bulletin of Accommodation Statistics (Ministry and Municipality Licensed), Republic of Turkey, Ministry of Tourism, Ankara, 2002

An increase the share of domestic visitor arrivals and overnight stays is also observed for municipal licensed accommodation facilities. This share was 84% for both arrivals and stays for the year 2000 whereas for the year 2002 the share in arrivals increased to 87% and the share in overnight stays remained unchanged (Table 5).

Table 5: The Share of Domestic and Foreign Visitors within the Total Arrivals and Overnight Stays in Municipal Licensed Accommodation Facilities (2000 – 2002)

| Years | | No. of arrivals | | | Overnight Stays | | | Percentages of Arrivals (%) | | | Percentages of Overnights (%) | | |
|-------|--------|-----------------|-----------|------------|-----------------|------------|------------|-----------------------------|----------|-------|-------------------------------|----------|-------|
| | | Foreign | Domestic | Total | Foreign | Domestic | Total | Foreign | Domestic | Total | Foreign | Domestic | Total |
| 2000 | Region | 106,782 | 568,849 | 675,631 | 124,679 | 660,885 | 785,564 | 16 | 84 | 100 | 16 | 84 | 100 |
| | Turkey | 1,662,005 | 9,515,085 | 11,177,090 | 5,993,602 | 15,487,749 | 21,481,351 | 15 | 85 | 100 | 28 | 72 | 100 |
| 2001 | Region | 60,761 | 661,564 | 722,325 | 76,929 | 741,794 | 818,723 | 8 | 92 | 100 | 9 | 91 | 100 |
| | Turkey | 2,144,606 | 8,655,588 | 10,800,194 | 7,239,131 | 13,202,431 | 20,441,562 | 20 | 80 | 100 | 35 | 65 | 100 |
| 2002 | Region | 60,668 | 398,095 | 458,763 | 90,019 | 472,756 | 562,775 | 13 | 87 | 100 | 16 | 84 | 100 |
| | Turkey | 3,249,837 | 8,456,432 | 11,706,269 | 9,901,035 | 13,028,808 | 22,929,843 | 28 | 72 | 100 | 43 | 57 | 100 |

Source: Bulletin of Municipality Registered Accommodation Statistics, Republic of Turkey, Ministry of Tourism, Ankara, 2002

Naturally, a similar trend is observed for the total accommodation facilities. For the total accommodation facilities, the share of domestic visitor arrivals and overnight stays for the

year 2000 were 80% and 81% respectively whereas these figures for 2002 were %84 and 83% (Table 6).

Table 6: The Share of Domestic and Foreign Visitors within the Total Arrivals and Overnight Stays in Ministry and Municipal Licensed Accommodation Facilities (2000 – 2002)

| Years | | No. of arrivals | | | Overnight Stays | | | Percentages of Arrivals (%) | | | Percentages of Overnights (%) | | |
|-------|--------|-----------------|------------|------------|-----------------|------------|------------|-----------------------------|----------|-------|-------------------------------|----------|-------|
| | | Foreign | Domestic | Total | Foreign | Domestic | Total | Foreign | Domestic | Total | Foreign | Domestic | Total |
| 2000 | Region | 214,151 | 867,170 | 1,081,321 | 251,892 | 1,047,562 | 1,299,454 | 20 | 80 | 100 | 19 | 81 | 100 |
| | Turkey | 8,466,081 | 18,370,987 | 26,837,068 | 34,504,508 | 31,963,448 | 66,467,956 | 32 | 68 | 100 | 52 | 48 | 100 |
| 2001 | Region | 116,620 | 897,274 | 1,013,894 | 149,930 | 1,052,931 | 1,202,861 | 12 | 88 | 100 | 12 | 88 | 100 |
| | Turkey | 10,922,771 | 16,405,210 | 27,327,981 | 43,607,631 | 27,380,820 | 70,988,451 | 40 | 60 | 100 | 61 | 39 | 100 |
| 2002 | Region | 126,045 | 685,280 | 811,325 | 180,656 | 855,835 | 1,036,491 | 16 | 84 | 100 | 17 | 83 | 100 |
| | Turkey | 13,121,431 | 16,373,138 | 29,494,569 | 53,213,533 | 28,231,253 | 81,444,786 | 44 | 56 | 100 | 65 | 35 | 100 |

Source: Bulletin of Accommodation Statistics (Ministry and Municipality Licensed), Republic of Turkey, Ministry of Tourism, Ankara, 2002

When the figures for arrivals and overnight stays are analyzed at the regional and national levels for the period 1996 – 2002, it is observed that the rate of increase in the arrivals to ministry licensed accommodation facilities has been higher for the region as compared to the national average (Table 7). The annual rate of increase in the arrivals to the accommodation facilities in the Region has been 7.6% whereas the national average was 5.4 % (Figure 1).

On the other hand, the rate of increase in the overnight stays in ministry licensed accommodation facilities in the Region is below the national average. These figures have been 6.4 % in the Region for the period 1996 – 2002 whereas the national average was 6.8% (Table 8).

There is decreasing trend in the number of arrivals and overnight stays for the municipal licensed accommodation facilities of the Region. These two operational figures are below the national average for the period 1996 – 2002.

This decreasing trend for municipal licensed accommodation facilities influences negatively the trend for the total facilities. For this reason the rate of increase (the growth rate) for the total also has a negative value (i.e. “-“) (Figure 2).

In summary, it can be stated that the ministry-licensed facilities have shown a positive development whereas a negative (backward) trend is observed for municipal licensed facilities in terms of arrivals and overnight stays for the period 1996 – 2002.

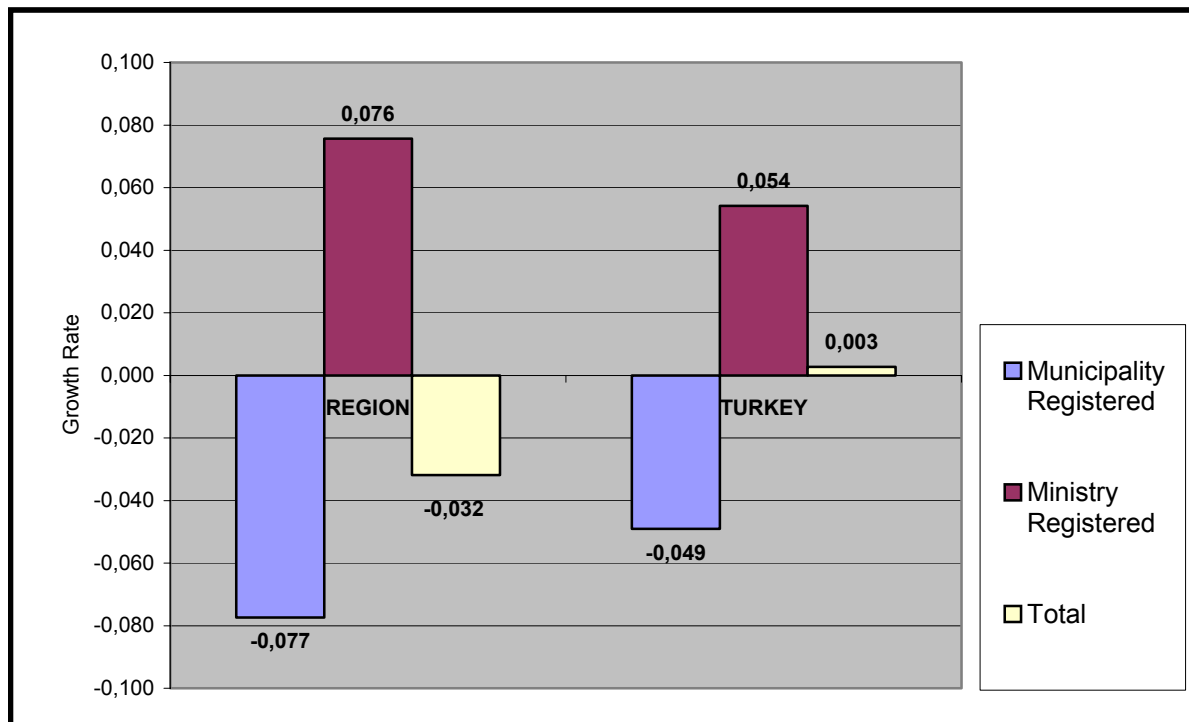
Table 7: Number of Arrivals to Accommodation Facilities in the Region and in Turkey (1996 –2002)

| Years | Ministry Licensed | | Municipality Licensed | | Total | |
|-------|-------------------|--------|-----------------------|--------|--------|--------|
| | Region | Turkey | Region | Turkey | Region | Turkey |

| | | | | | | |
|-------------------------|---------|------------|-----------|------------|-----------|------------|
| 1996 | 211,598 | 12,294,141 | 806,425 | 16,648,944 | 1,018,023 | 28,943,085 |
| 1997 | 301,042 | 17,093,284 | 1,538,563 | 15,783,787 | 1,839,605 | 32,877,071 |
| 1998 | 326,846 | 15,284,257 | 818,159 | 13,458,219 | 1,145,005 | 28,742,476 |
| 1999 | 361,983 | 12,676,877 | 641,688 | 11,171,704 | 1,003,671 | 23,848,581 |
| 2000 | 405,690 | 15,659,978 | 675,631 | 11,177,090 | 1,081,321 | 26,837,068 |
| 2001 | 291,569 | 16,527,787 | 722,325 | 10,800,194 | 1,013,894 | 27,327,981 |
| 2002 | 352,562 | 17,788,300 | 458,763 | 11,706,269 | 811,325 | 29,494,569 |
| Growth Rate (1996-2002) | 0.076 | 0.054 | -0.077 | -0.049 | -0.032 | 0.003 |

Source: Bulletin of Accommodation Statistics (Ministry and Municipality Licensed), Republic of Turkey, Ministry of Tourism, Ankara, 1996-2002

Figure 1: Growth Rates for the Number of Arrivals to the Accommodation Facilities (1996-2002)



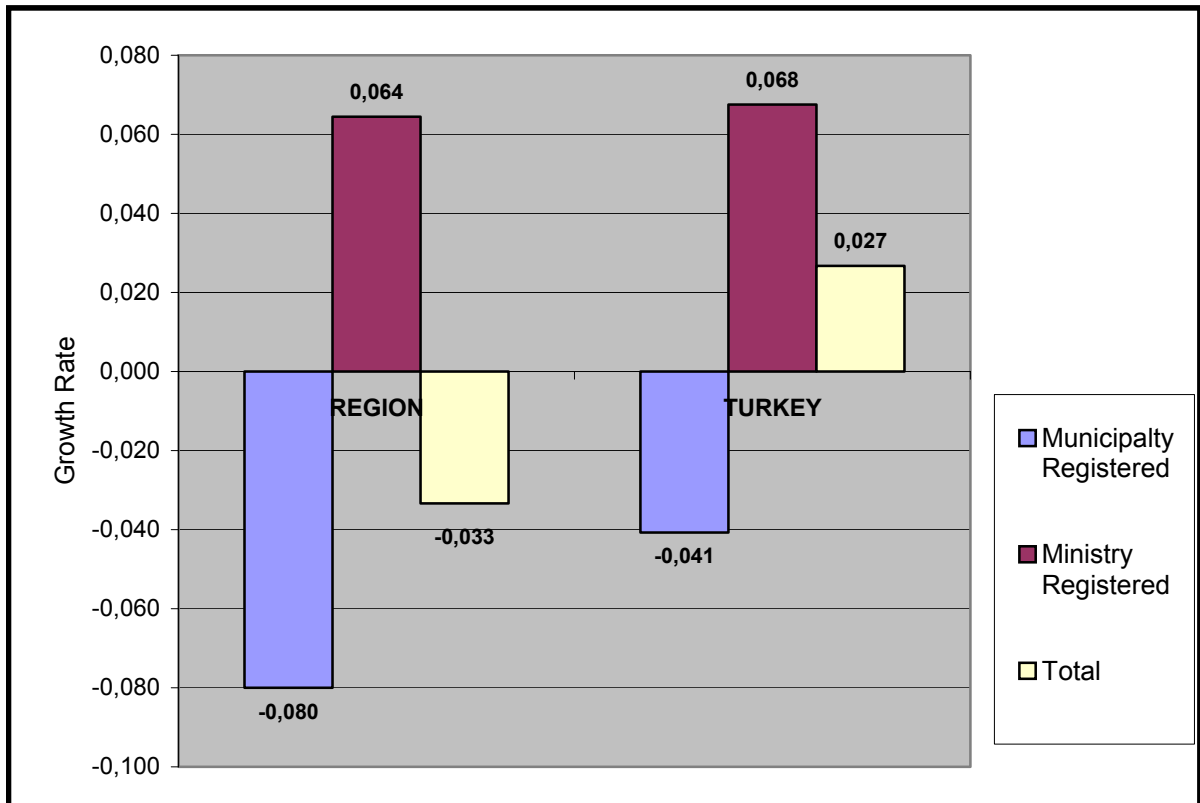
Source: Bulletin of Accommodation Statistics (Ministry and Municipality Licensed), Republic of Turkey, Ministry of Tourism, Ankara, 1996-2002

Table 8: Number of Overnight Stays in the Accommodation Facilities in the Region and in Turkey (1996 –2002)

| Years | Ministry Licensed | | Municipality Licensed | | Total | |
|-------------------------|-------------------|------------|-----------------------|------------|-----------|------------|
| | Region | Turkey | Region | Turkey | Region | Turkey |
| 1996 | 305,870 | 37,038,901 | 1,008,794 | 30,684,853 | 1,314,664 | 67,723,754 |
| 1997 | 418,975 | 51,108,608 | 1,996,900 | 29,205,326 | 2,415,875 | 80,313,934 |
| 1998 | 469,785 | 45,946,270 | 1,094,158 | 25,606,496 | 1,563,943 | 71,552,766 |
| 1999 | 498,899 | 37,217,721 | 870,195 | 20,853,174 | 1,369,094 | 58,070,895 |
| 2000 | 513,890 | 44,986,649 | 785,564 | 21,481,351 | 1,299,454 | 66,468,000 |
| 2001 | 384,138 | 50,546,889 | 818,723 | 20,441,562 | 1,202,861 | 70,988,451 |
| 2002 | 473,716 | 58,514,943 | 562,775 | 22,929,843 | 1,036,491 | 81,444,786 |
| Growth Rate (1996-2002) | 0.064 | 0.068 | -0.080 | -0.041 | -0.033 | 0.027 |

Source: Bulletin of Accommodation Statistics (Ministry and Municipality Licensed), Republic of Turkey, Ministry of Tourism, Ankara, 2002

Figure 2: Growth Rates for the Number of Overnight Stays in the Accommodation Facilities (1996-2002)



Source: Bulletin of Accommodation Statistics (Ministry and Municipality Licensed), Republic of Turkey, Ministry of Tourism, Ankara, 1996-2002

2.1.1 Accommodation Facilities and Capacities

The main development in regional tourism, as stated above, has been observed in the recent years. Most of the foreign and domestic arrivals to the Region are with tour organizations. As a result, increases in both higher quality facilities and capacities (number of beds) are also observed though the number of municipal licensed facilities and their bed capacities are still higher than those of the ministry licensed facilities (Table 9).

Municipal licensed tourism facilities are the majority in the Region. In 2002, there are a total of 396 licensed tourism facilities. Of these 349 are municipal licensed and only 47 are ministry licensed (88% and 12% respectively).

The total number of beds at the end of the year 2002 were 17,252 of these, 12,704 are municipal licensed and only 4,548 are ministry licensed (74%, 26% respectively).

Most of the ministry licensed facilities are 3* or 2* facilities. These two groups of hotels make up for 83% of the total ministry licensed beds. This does not diverge too much when compared to the national ratio for this figure, which is 55%.

Another figure that is comparable with the national average is the # of beds in ministry licensed facilities. This figure is 97 beds per ministry-licensed facility for the Region and 187 beds for the national average.

Another important situation is that there is only one 5* Hotel and only two 4* Hotels in the Region.

It should also be noted that the # of facilities, # of beds, the classification and their service quality levels are below the national average.

Table 9: Distribution of Number of Beds of Ministry and Municipal Licensed Accommodation Facilities (2002)

| | Hotels | 5* | 4* | 3* | 2* | 1* | Special Licensed | Hotels Total | Facilities Ministry Licensed | with Municipal Licensed | Total |
|-----------------------------------|------------|--------|--------|--------|--------|-------|------------------|--------------|------------------------------|-------------------------|---------|
| Study Area (Region) | # of estab | 1 | 2 | 13 | 26 | 4 | 1 | 47 | 47 | 349 | 396 |
| | # of beds | 331 | 402 | 1597 | 1981 | 199 | 38 | 4,548 | 4,548 | 12,704 | 17,252 |
| Study Area- Internal Distribution | # of estab | 2% | 4% | 28% | 55% | 9% | 2% | 100% | 12% | 88% | 100% |
| | # of beds | 7% | 9% | 35% | 44% | 4% | 1% | 100% | 26% | 74% | 100% |
| Study Area /Turkey | # of estab | 1% | 1% | 3% | 4% | 3% | 1% | 3% | 2% | 4% | 4% |
| | # of beds | 0% | 0% | 2% | 4% | 2% | 1% | 1% | 1% | 3% | 2% |
| Turkey | # of estab | 144 | 275 | 512 | 647 | 139 | 93 | 1,810 | 2,124 | 7,772 | 9,896 |
| | # of beds | 86,292 | 81,341 | 83,147 | 55,936 | 8,313 | 5,610 | 320,639 | 396,148 | 408,005 | 804,153 |
| Turkey – Internal Distribution | # of estab | 7% | 13% | 24% | 30% | 7% | 4% | 85% | 21% | 79% | 100% |
| | # of beds | 22% | 21% | 21% | 14% | 2% | 1% | 81% | 49% | 51% | 100% |

Source: Bulletin of Accommodation Statistics (Ministry and Municipality Licensed), Republic of Turkey, Ministry of Tourism, Ankara, 2002

When the trend of bed capacities is analyzed for the period 1996 – 2003, it can be observed that ministry licensed beds in the Region have shown a continuous rate of increase as with the national level (Table: 10).

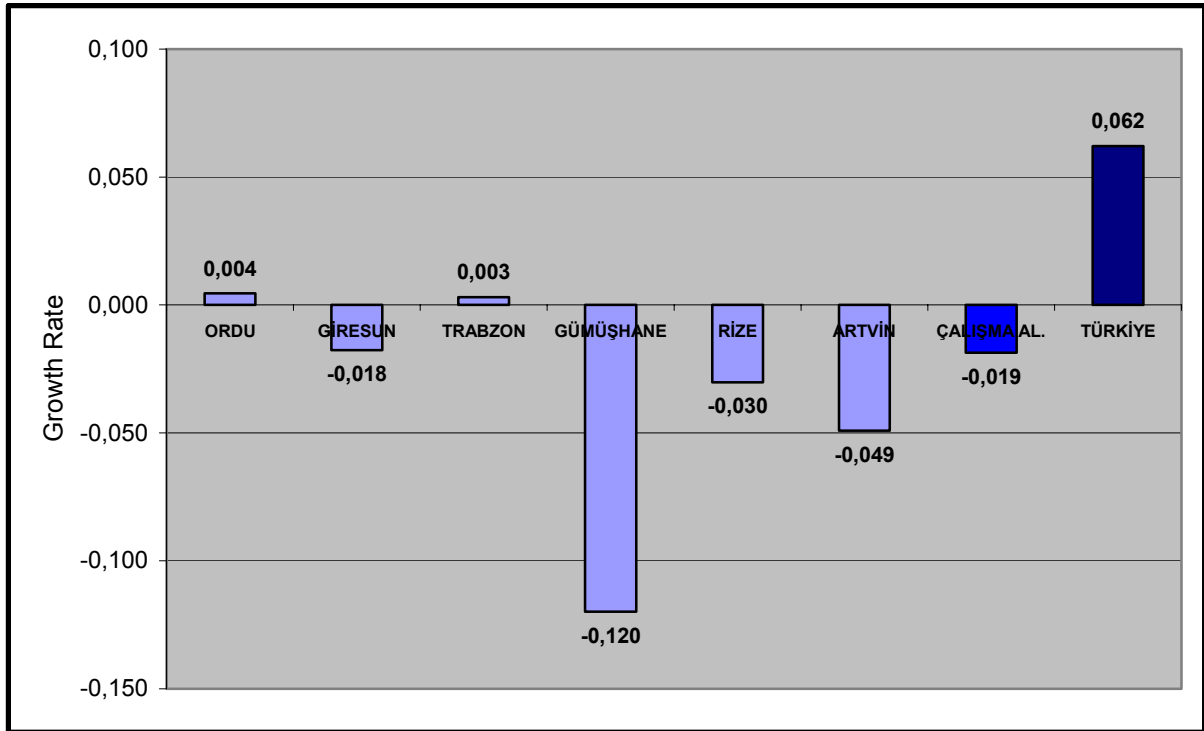
As opposed to this trend, the bed capacities in municipal licensed facilities have shown a continuous decline in the Region whereas the number of municipal licensed beds at the national level are increasing.

Table 10: Number of Beds in Accommodation Facilities in the Region and in Turkey

| Years | Ministry Licensed | | Municipality Licensed | | Total | |
|-------------------------|-------------------|---------|-----------------------|---------|--------|---------|
| | Region | Turkey | Region | Turkey | Region | Turkey |
| 1996 | 2,463 | 286,821 | 17,221 | 238,830 | 19,684 | 525,651 |
| 1997 | 3,584 | 321,129 | 16,690 | 271,937 | 20,274 | 593,066 |
| 1998 | 4,062 | 273,059 | 12,464 | 256,039 | 16,526 | 529,098 |
| 1999 | 3,634 | 274,842 | 10,855 | 218,980 | 14,489 | 493,822 |
| 2000 | 3,262 | 344,885 | 13,605 | 344,885 | 16,867 | 689,770 |
| 2001 | 4,005 | 368,819 | 13,865 | 335,818 | 17,870 | 704,637 |
| 2002 | 4,548 | 396,148 | 12,704 | 408,005 | 17,252 | 804,153 |
| Growth Rate (1996-2002) | 0.091 | 0.046 | -0.043 | 0.080 | -0.019 | 0.062 |

Source: Bulletin of Accommodation Statistics (Ministry and Municipality Licensed), Republic of Turkey, Ministry of Tourism, Ankara, 1996-2002

Figure 3: Growth Rates of Number of Beds in Ministry and Municipal Registered Facilities (1996-2002)



Source: Bulletin of Accommodation Statistics (Ministry and Municipality Licensed), Republic of Turkey, Ministry of Tourism, Ankara, 1996-2002

2.1.2 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.

2.1.3 Main Attributes of the Visits

The average length of stay in municipal licensed facilities of the Region is below the average length of stay at the national level. 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. All these figures are above the regional averages (Table 12)

The main reason behind the relatively higher levels of overnight stays at the national level is the organized tours for 7 to 10 days and stays in one facility. These figures show the importance of the organized tours. There are abundant organized tours in the Region but due to the specialties of the tour packages sold, only one or two night stays are accomplished in the facilities within the Region. The relative short term of stays in the facilities is associated with this fact. 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 (Attachment: Tourists Surveys). The figures of the Ministry of Culture and Tourism for 2002 are based on the facilities and are 1.43. These figures show that the regional provinces should be targeted as destination points rather than transit points.

Table 11: Overnight Stays and Occupancy Rates for Ministry and Municipal Licensed Accommodation Facilities (2000-2002)

| Years | | Overnight Stays | | | No. Of Beds | Average Period of Stay | | | Occupancy (%) |
|-------|--------|-----------------|------------|------------|-------------|------------------------|----------|-------|---------------|
| | | Foreigner | Domestic | Total | | Foreigner | Domestic | Total | |
| 2000 | Region | 251,892 | 1,047,562 | 1,299,454 | 16,867 | 1.18 | 1.21 | 1.20 | 43 |
| | Turkey | 34,504,508 | 31,963,448 | 66,467,956 | 689,770 | 4.08 | 1.74 | 2.48 | 37 |
| 2001 | Region | 149,930 | 1,052,931 | 1,202,861 | 17,870 | 1.3 | 1.3 | 1.3 | 26 |
| | Turkey | 43,607,631 | 27,380,820 | 70,988,451 | 704,637 | 4.1 | 1.8 | 3.1 | 46 |
| 2002 | Region | 180,656 | 855,835 | 1,036,491 | 17,252 | 1.43 | 1.25 | 1.28 | 29 |
| | Turkey | 53,213,533 | 28,231,253 | 81,444,786 | 801,379 | 4.06 | 1.72 | 2.76 | 49 |

Source: Bulletin of Accommodation Statistics (Ministry and Municipality Licensed), Republic of Turkey, Ministry of Tourism, Ankara, 1996-2002

2.1.3.1 Trends in Visitors' Spending

According to the data of the Ministry of Culture and Tourism, a foreign visitor spends 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 a 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. The difference in the income levels of the foreign and domestic visitors as well as the preference of cheaper facilities by the domestic visitors has resulted in this situation.

2.1.4 New and Alternative Tourism

The main factor behind the success of Turkish tourism development in the last few decades is the developments it has achieved in mass tourism. The criteria of "sea and sunshine" were the main decisive criteria in formulating the travel plans. Thus, Aegean and Mediterranean coasts that provided abundant supply of sea and sunshine have attracted the main investments in tourism. Major share in the arrivals and overnight stays at the national level belongs to the provinces of Antalya and Muğla located on this coast. For example, these two provinces account for 38% of total arrivals to accommodation facilities and 62% of total overnight stays for the year 2002. Similarly, these two provinces also account for 54% of the total ministry licensed beds. In summary, Antalya and Muğla provinces account for half of the country's tourism activities and nearly two thirds of overnight stays.

The tourism development potential of the Eastern Black Sea Region is based on "natural" and "cultural" assets, presenting an alternative to the trend at the national level and providing opportunities for diversification of tourism products. With adequate levels of investment and organization, this potential is rich enough to provide important positive impetus to the tourism sector. As the tourist survey results show also, the main objectives of visiting the region are mainly visiting the natural and cultural assets.

The concept of alternative tourism and activities related with alternative tourism has already emerged in the Turkish tourism. The activities termed as alternative tourism are continually

gaining more and more importance besides mass tourism. This new development has emerged initially at the locations that have already developed by mass tourism or at their close vicinity with opportunities of easy access. Examples to these are the rafting activities on Köprüçay River in Antalya and on Dalaman River in Muğla or trekking and camping on Fethiye and Göcek Plateaus in Muğla and Bey Mountains and Beycik Plateau in Antalya. What can be termed as “green tourism” is emerging on the coasts of the Black Sea near İstanbul and in the forest areas located in the inner zones through walks and visits organized mainly during the weekends. The main attendants of these organizations are domestic people. Plateaus of Düzce and Bolu recently are included in such programs as well as Küre Mountains.

Visits with natural and cultural objectives are also directed towards Cappadocia and Mount Nemrut in Adıyaman. As expected, the visitors to these areas, both domestic and foreign are well informed about the areas they are visiting.

With its natural and cultural assets, Eastern Black Sea Region has potential no less than the areas mentioned above. There have been important developments in this respect during the recent years.

As such, alternative tourism still does not have an important share in the country’s tourism sector. The total overnight stays at ministry licensed facilities in Nevşehir (Cappadocia) account for only 1,5% of the total national for the year 2002. This share is only 0,1% in Adıyaman (Mount Nemrut). If overnight stays in the Black Sea Region is added to these figures the total share of the three account for only 2,4% of the national total. On the other hand, the total bed capacity in these areas accounts for 3,2% of the national total.

These figures show that alternative tourism is yet to develop; but it can be stated that the country possesses important potential for the development of different types of alternative tourism.

Table 12: Arrivals, Overnight Stays and Bed Capacities of Ministry Licensed Facilities at Different Tourism Attraction Locations (2002)

| 2002 Provinces | No. Of Arrivals | | | Overnight Stays | | | No. Of Beds | Average Length of Stay (days) | | | Occupancy (%) |
|----------------------|-----------------|----------------|----------------|-----------------|----------------|----------------|--------------|-------------------------------|------------|------------|---------------|
| | Foreign | Domestic | Total | Foreign | Domestic | Total | | Foreign | Domestic | Total | |
| Ordu | 1,943 | 53,771 | 55,714 | 3,114 | 70,185 | 73,299 | 634 | 1.6 | 1.3 | 1.3 | 26 |
| Giresun | 551 | 40,720 | 41,271 | 868 | 55,249 | 56,117 | 546 | 1.6 | 1.4 | 1.4 | 22 |
| Trabzon | 46,273 | 107,106 | 153,379 | 61,032 | 141,589 | 202,621 | 2,122 | 1.3 | 1.3 | 1.3 | 27 |
| Gümüşhane | 152 | 2,479 | 2,631 | 182 | 5,070 | 5,252 | 54 | 1.2 | 2.0 | 2.0 | 35 |
| Rize | 2,971 | 37,005 | 39,976 | 3,767 | 51,349 | 55,116 | 537 | 1.3 | 1.4 | 1.4 | 29 |
| Artvin | 13,487 | 46,104 | 59,591 | 21,674 | 59,637 | 81,311 | 655 | 1.6 | 1.3 | 1.4 | 35 |
| Regional Tot. | 65,377 | 287,185 | 352,562 | 90,637 | 383,079 | 473,716 | 4,548 | 1.4 | 1.3 | 1.3 | 29 |
| Antalya | 4,050,824 | 864,601 | 4,915,425 | 25,289,860 | 2,836,846 | 28,126,706 | 150,955 | 6.2 | 3.3 | 5.7 | 63 |
| Muğla | 1,294,206 | 524,582 | 1,818,788 | 6,770,069 | 1,388,821 | 8,158,890 | 63,372 | 5.2 | 2.6 | 4.5 | 51 |
| Nevşehir | 325,325 | 165,736 | 491,061 | 612,991 | 281,951 | 894,942 | 7,445 | 1.9 | 1.7 | 1.8 | 34 |
| Adıyaman | 9,457 | 19,974 | 29,431 | 11,966 | 21,944 | 33,910 | 655 | 1.3 | 1.1 | 1.2 | 13 |
| İstanbul | 1,956,399 | 1,151,227 | 3,107,626 | 4,756,794 | 2,179,716 | 6,936,510 | 48,309 | 2.4 | 1.9 | 2.2 | 40 |
| Turkey | 9,871,594 | 7,916,706 | 17,788,300 | 43,312,498 | 15,202,445 | 58,514,943 | 393,374 | 4.4 | 1.9 | 3.3 | 49 |

Source: Bulletin of Accommodation Statistics (Ministry and Municipality Licensed), Republic of Turkey, Ministry of Tourism, Ankara, 1996-2002

Table 13: The Share (%) of Arrivals, Overnight Stays and Bed Capacities of Ministry Licensed Facilities at Different Tourism Attraction Locations (2002)

| 2002 Provinces | Arrivals. | | | Overnight Stays | | | No. Of Beds |
|---------------------|-----------|----------|-------|-----------------|----------|-------|-------------|
| | Foreign | Domestic | Total | Foreign | Domestic | Total | |
| <i>Region Tot..</i> | 1% | 4% | 2% | 0% | 3% | 1% | 1% |
| Antalya | 41% | 11% | 28% | 58% | 19% | 48% | 38% |
| Muğla | 13% | 7% | 10% | 16% | 9% | 14% | 16% |
| Nevşehir | 3% | 2% | 3% | 1% | 2% | 2% | 2% |
| Adıyaman | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| İstanbul | 20% | 15% | 17% | 11% | 14% | 12% | 12% |
| Turkey | 100% | 100% | 100% | 100% | 100% | 100% | 100% |

Source: Bulletin of Accommodation Statistics (Ministry and Municipality Licensed), Republic of Turkey, Ministry of Tourism, Ankara, 1996-2002

One of the major characteristics of domestic visitors in the Region is the increasing utilization of organized tours. There are individual visits also but, the observations and surveys show those visitors utilizing organized tours or group visits are the majority. This characteristic differentiates the Region from the other regions in the country. This is also true for foreign visitors.

In parallel to the above stated characteristic, visits to the Region displays below listed characteristics also:

- i. There is a high level of organization for tours. Tour programs are initiated and prepared by travel agents.
- ii. Tour programs are set forth initially. Normally, this program is adhered to.
- iii. Tours are organized with coaches, high capacity vans and airways that have high passenger capacities. Private cars are only utilized for those individual visits not associated with any tours.
- iv. Mass tourism is not common in the Region. According to the program, the visitors spend one or maximum two nights at any tourist destination area.
- v. The visitors are informed about the Region prior to their visit. Even though this is mainly the case, it is observed that guide services are not adequate during the tours.

These characteristics are the typical characteristics for “alternative tourism”.

2.2 Tours Organized in the Region

Most of the visits associated with the natural and cultural assets utilize the tours organized for such purposes. Besides these, individual visits by the locals and foreigners with trade and business concerns are also realized.

The studies undertaken in the Region and the surveys conducted with the travel agencies have revealed that visits from the countries around the Black Sea (e.g. Russia, Georgia, Ukraine, Azerbaijan and Iran) are mostly concerned with business and trade, in an unorganized manner.

Nearly all of the visits by the foreigners that do not carry business and trade concerns are organized by tours. In most of these tour programs, the Region is a part of a larger tour (i.e an interim stop) and not a destination itself. Most tour programs include Eastern and Central Anatolia as well. The tourists that utilize these tour programs are mostly the citizens of USA, western European countries and Israel.

Some of the travel agencies have been organizing tours to the Region for nearly 10 years. Besides these, agencies and other civilian entities that promote and market the Region in the internet (i.e e-tourism) have emerged in the last few years. These programs concentrate

mainly on natural sports activities such as Mount Kaçkar climbing and rafting on the Çoruh River and usually last 7 to 11 days.

A similar outlook is true for domestic visitors as well. According to the results of the survey conducted with the travel agencies, most of the domestic visitors to the Region originate from the three large metropolitan areas, İstanbul, Ankara and İzmir. Travel agencies also organize tours from other centers within the country but these are mostly ad hoc organizations.

Even though the number and the names of the travel agencies or tour operators that organize tours to the Region change from year to year, there are specialized agencies located in large metropolitan centers and that organize periodic tours (i.e Saltur, ETS Ayder, etc). In some of these tours, East Anatolia is also visited after the Region. Domestic visitors tour periods are shorter (i.e 5-7 days) than those of foreigners. Regional agencies on the other hand do not have offices in large metropolitan areas and they do not organize periodic tours as such.

2.2.1. The Tours' Point of Entry to the Region and Modes of Transport

Most of the foreign visitors by tours arrive to the Region via airways and sometimes by coaches. Trabzon Airport is the choice for arrival. In recent years, Erzurum Airport is also being utilized for those tours that visit Artvin and Rize as well.

Intra-regional trips are usually made with small coaches or minibuses according to the number of tour participants and the route. When the tour extends beyond the Region, coaches are usually the main mode of transport. Besides these and for especially for tours that include Mount Kaçkar and Çoruh River, rental 4x4 vehicles are also utilized.

Nearly all of the domestic tours are organized by coaches. Most of these tours enter the Region via Ünye in the province of Ordu.

The exit point may differ according to the tour program and route. The province of Ordu is again the main exit point. If the tour includes East Anatolia, then the exit point is usually Gümüşhane or the district of Şavşat in Artvin.

Because the passenger ships no longer operate between the main ports (i.e İstanbul and the ports of the Region), the tours that were organized via seaways have been terminated.

2.2.2 Important Routes for Tours and Points of Overnight Stays

Even though the Region offers a wide variety of attractions, most tours (especially tours for domestic visitors) follow the same route within the Region. They follow mainly the coastal road and reach into inner areas through the same routes. The route may differ only if some of the attractive areas located in the inner sections are included in the tour program.

The axis that the domestic tours follow is: Ünye (point of entry) – Ordu – Giresun – Trabzon – Rize – Hopa.

On this route, the following points of attraction that are located in inner sections are visited and these may cause the route to differ:

- Giresun-Dereli-Kümbet Plateau
- Trabzon-Maçka- Sümela Monastery (Altındere Valley)
- Trabzon – Of – Çaykara – Uzungöl
- Rize-Ardeşen-Çamlıhemşin-Ayder Baths and Plateau

If East Anatolia is included in the tour program, then the route may differ as follows:

- Ordu-Giresun-Trabzon-Maça-Gümüşhane-Bayburt-Erzurum
- Ordu-Giresun-Trabzon-Rize-Hopa-Artvin (Kafkasör)-Şavşat-Ardahan

In this case, the exit point is either Gümüşhane or Şavşat (Artvin). Some tours follow through the province of Rize, İyidere – İkizdere-İspir - Erzurum route. An interesting point is the non existence of Yusufeli in any of the domestic tours.

The points of overnight stays on this route is as follows:

- An overnight stay in Ünye, Fatsa, Perşembe or Ordu in the province of Ordu,
- An overnight stay in Giresun for some of the tours,
- Two or three nights stay in Trabzon, Uzungöl or Maça (Sümela – Altındere Valley National Park),
- An overnight stay in Rize, especially in Ayder.

Most of the tour programs are 7 day programs with 6 overnight stays.

There is a wider diversification of tour programs for foreign visitors. The tours that utilize the Trabzon Airport as the point of entry follow the relatively different routes given below. Today, the primary characteristic of these tours is their coverage of Rize, Artvin and Gümüşhane located in the eastern and southern sections of the Region.

- Trabzon-Sümela-Uzungöl-Rize-Ardeşen-Çamlıhemşin-Ayder-Hopa-Artvin-Yusufeli-Erzurum
- Trabzon-Sümela-Ayder-Rize-İyidere-İkizdere-İspir-Erzurum
- Trabzon-Sümela-Ayder-Hopa-Artvin-Şavşat-Ardahan

In recent years, some tours utilize the Erzurum Airport to reach the Region. In this case, same routes are followed with Erzurum being the point of departure. Trabzon Airport is the main point of exit

The night stays for the foreign visitor tour programs differ according to the purpose of the tour. For purposes of nature and culture, the overnight stays are as follows:

- Two nights stay in Trabzon City (as the main point of stay), Uzungöl or Maça (Sümela – Altındere Valley National Park) in the province of Trabzon,
- One night stay especially in Ayder or in İkizdere Ovit Plateau in the province of Rize,
- One night stay in Hopa or Artvin City in the province of Artvin.

These tour programs cover 6 days with 5 night stays. The participants are usually middle – age groups.

A second activity realized by the foreigners and especially the younger age groups is the nature sports activities in Rize and Artvin provinces. The routes utilized for these tours that reach the Region via Trabzon or Erzurum Airport is as follows:

- Trabzon-Rize-Ayder-İkizdere-İspir-Yusufeli-Erzurum,
- Erzurum-Tortum-Yusufeli-Artvin-Rize-Trabzon

Overnight stays for these tours are usually in Ayder or in the district center or the villages of Olgunlar, Yaylalar and Altıparmak of Yusufeli. The tours with the purposes of climbing and trekking in Mount Kaçkar or with rafting on the Çoruh River have relatively longer periods

from 7 to 11 days. Most of the overnight stays are in municipal licensed accommodation facilities or in camping sites.

2.2.3 Areas of Attraction – Important Points of Destination and Interim Stations

The tour routes described above also show the important areas or points of attraction, interim stations and points of rest.

For foreign visitors the main attraction is the natural and cultural assets located in the eastern and northern sections of the Region with Trabzon being the major area of attraction.

The province of Trabzon with its cultural heredity and its location is an area of attraction by itself. Such characteristics as the urban fabric within which examples of historical civilian architecture exist and individual monument buildings as Hagiasophia and Atatürk Mansion render Trabzon as attractive in terms of historical cultural assets. The city is also in close proximity to such areas as Sümela where natural and cultural assets are intermingled and to Uzungöl where natural assets are abundant. The city serves as a point of stay for visits to these areas. These two main attraction areas exist in almost all tour programs for foreign visitors. Some programs also include such areas Hıdırnebi Plateau that have facilities.

Another area of attraction are the plateaus, peaks, glacier lakes, Zır Kale, etc located in Ayder and Çamlıhemşin in the province of Rize. In recent years, İkizdere – Ovit Plateau located on the Rize – İspir – Erzurum route is emerging as a point for overnight stays due mainly to its locational advantage.

Natural and cultural assets are located side by side within the province of Artvin. Most of the visits are made with the purpose of seeing the natural beauties and assets. There are cultural assets located very near to these natural assets and this is an important opportunity for Artvin. Yusufeli and environs rank first amongst such places. Besides providing favorable opportunities for trekking or climbing on Mount Kaçkar and for rafting, Yusufeli also houses the churches of Barhal and İřhan. According to unofficial figures, 35.000 foreign tourists have visited Yusufeli in 2002. Artvin province is also attracting interest with its old forests. Botanical tourism is a new type of tourism emerging.

The tour programs for domestic visitors cover the coastal settlements and Sümela and Uzungöl in Trabzon and Ayder in Rize as in the case for foreign visitors. Western provinces of the Region are also visited in domestic's tours. Ünye, Fatsa, Perşembe and the city of Ordu in the province of Ordu rank first in this respect. Especially Boztepe in Ordu as the point of vista is important. The Giresun Castle and Giresun Island and Tirebolu are areas of interest and attraction in the province of Giresun. According to the level and quality of facilities provided, plateaus of Ordu and Giresun are being included in recent tour programs. In this respect, Çambaşı in Ordu and Kümbet and Koçkayası in Giresun can be stated.

In domestic tours the visitors see Black Sea while in movement along the coast. Because the tour program days are limited, overnight stays in interior areas are limited also.

In case the tour includes Eastern Anatolia and Erzurum, Settlements in the province of Gümüşhane are then utilized as points of overnight stay or points of rest.

2.2.4 The Views and Recommendations of Travel Agencies With Respect To Tourism Development

There are more than twenty travel agencies or tour operators in the Region and these functions as the regional branches of the agencies that operate at the national and international levels. These services cover mainly intra-regional transport and guide services.

Reservation and ticket sales are also partially included in the services provided. Agencies that undertake such services of reservation and ticket sales make up 61 percent of the total agencies in the Region. However, these agencies do not organize tour programs by themselves. The main areas of activity for the agencies are: ticket sales (17.4%), transfers (13%), passport services (8.7%), car rental (8.7%) and small scale organizations. All agencies that provide transfer services, ticket sales and reservation are located in Trabzon (Appendix D: Interview Survey to Tour Agents).

These agencies and operators state that the main obstacles to development of tourism are the unplanned growth and building, difficulties in transport and insufficient infrastructure.

They also state that the opportunities for the development of tourism will vastly be improved once these problems and obstacles to development are alleviated. They view the natural assets promotion and marketing as the main potential (65%). The views that state the benefits of diversification and development in all types of tourism account for 25% of all that are interviewed. It is interesting to note that only 10% gives priority to development of plateau tourism.

Agencies and operators on the other hand also state that the development potential in regional tourism is subject to the utilization of the potentials in such areas as Amasya, Erzurum (Ispir and Palandöken), Sinop, Bolu, Düzce and Kastamonu provinces located outside the Region together with the potentials of the Region. They have recommended that Eastern Black Sea Region should be included in and will benefit from the wider tour programs organized. Today, these provinces are included in most of the tours that also include the Region.

2.3 Tourist Inquiry Results

In the region, a tourist inquiry was carried out with 572 persons. Of them, 309 persons were national visitors and 263 persons were Foreigner visitors.

2.3.1 Individual Visits and Visits by Tours

It is known that the visits made to the Region for natural and cultural purposes are organized by tours. Undoubtedly, there are also individual visits to the Region, mostly for business purposes.

The Region is visited by the national visitors especially in between the four-month period, between middle of the May and middle of the September. The visits made in July and August is determined as the peak period. The same situation, seasonal fluctuations and peak periods, are also valid for the foreign visitors. In the end of September when these inquiries have been handled, it was difficult to find enough number of national and foreign visitors. For this reason, by contacting the accommodation facilities and the food & beverage facilities, inquiries have been handled with every visitor in these places. Almost all of the foreign visitors have come to the Region by tours.

This situation is different for the national visitors. While the large part of the visitors coming from big towns prefer coming to the Region by tours, visitors coming from provinces near to the Plan Area like Samsun and Erzurum prefer to come to the Region without an arrangement of a tour.

Tour operators and the operators of the accommodation facilities also approve that the Region is being visited in an organized way. Reliable documents and statistics do not exist related with this issue. For this reason, opinions and impressions have been used.

2.3.2 Expectations and Levels of Satisfaction of the Visitors

Persons visiting the Region stated that they were impressed primarily and mostly by natural assets. The ratio of visitors who said the plateaus and the mountains mostly impressed them is 83% and that of visitors who were mostly impressed by the coastal section is 23%. Domestic visitors (91%) were more impressed by Plateaus while foreign visitors (23.3) were more impressed by the coast. These figures indicate how important natural assets are.

A search into the satisfaction of visitors of the Region reveals that the physical quality of accommodation facilities was assessed as good by 51.7% and as bad by only 5.2% of the visitors. The quality of service provided by those facilities was assessed as good is by 50.7% and as bad by only 4.7% of the visitors. The information services provided was, however, assessed as fair by 37.4% and as bad or unsatisfactory by 33.3% of the visitors.

Much of the problems seem to have arisen with the infrastructure services. The infrastructure was assessed as bad by 41.3% and as satisfactory by 19.8%. The traffic arrangement is perceived fair by 40% and bad by 38.5% of the visitors.

Primary problems observed in the region are the trouble in relationships with the local people, the lack of social amenities and activities, and unstable prices. A 26.7% of the visitors expressed their worries about relationships with the local people. The same ratio is higher (34.4%) for domestic visitors. A significant part of the inquiry subjects complained about the lack of sportive and cultural amenities. For example, the ratio of visitors who considered the lack of sportive facilities as the primary problem is 24.3%. Unstable service rates were an issue of complaint for 14.9% of the visitors. The same ratio is also higher (17.7%) with the domestic visitors.

In tourist survey; expectations of the visitors also asked formulating a question as “What would you do to develop tourism in the Eastern Black Sea region?” as to five categories of priority, the primary areas of intervention are improved infrastructure (61.6%) and improved hygienic conditions (59.6%).

The ratio of visitors who identify as their primary task the conversion of historic buildings located in the traditional fabric to accommodation facilities is 49.1%. The ratio of visitors who considered the enhancement of urban amenities and the provision of arrangements like signposts and information boards as the primary task is 39%.

The ratio of visitors who put improved transport system in the primary category of interventions is 40.8%. It’s interesting that only 34.8% of the visitors marked price control as the primary priority.

The results of the survey show that the provision of adequate and healthy infrastructure services and environmental conditions is the main expectation. Planning and implementing modern urban area layouts that are in conformity with historical and cultural assets follows this.

2.3.3 The Opinions of the Visitors for the Development of Tourism Sector and for the Increase of Attractiveness of the Region

According to the answers given by the visitors to the question, “What would you do to develop tourism in the East Black Sea region?” as to five categories of priority, the primary areas of intervention are improved infrastructure (61.6%) and improved hygienic conditions (59.6%).

The ratio of visitors who identify as their primary task the conversion of historic structures located in the traditional fabric to accommodation facilities is 49.1%. The ratio of visitors who preside the enhancement of urban amenities and the provision of arrangements like signboards and information boards as the primary task is 39%.

The ratio of visitors who put improved transport system in the primary category of interventions is 40.8%. It's interesting that only 34.8 of the visitors marked price control as the primary priority.

The results show that the most important expectation of the visitors is the arrangement of the infrastructure and the creation of healthy environmental conditions. This is followed by the urban city plan and arrangements taking contemporary and cultural values into consideration.

2.3.4 General View of the Region According to the Visitors

The visitors have a positive viewpoint about the Region in general. This positive viewpoint becomes stronger related with the natural and cultural values (assets), becomes somewhat reasonable for the physical quality of the accommodation facilities and for the service quality. The satisfaction (pleasure) level of the visitors related with the infrastructure facilities and urban setting and services could be determined as middle or below middle.

2.4 The Evaluation of Tourism Sector In Terms of Expectations

The aims of the visits to the Region have been differentiated. National and foreign visitors are visiting the Region for natural and cultural purposes, also for business and trade purposes. From these two types of visits, the first one shows seasonal demand fluctuations, second one is steadier. Seasonal fluctuations and the shortness of the season are the most important difficulties operations and the facilities are facing.

To increase the seasonal fluctuations and to increase especially the number of nights spent should be the most significant goals of the sector in general.

2.4.1 Developing the Region as an Arrival Area

One of the most important necessity for the Region to be effective in the sector is to evaluate the Region in itself as an arrival area (different from the present practice), not as a part of big and broad-scoped tours. The first thing to do to create such a situation is to transform the opportunities of the Region into a tourism product and to make a diversification. The diversification of the products, the advertisement and promotion of these would take down the seasonal demand fluctuations to the lowest and would increase the accommodation period and the nights spent.

The product should be developed in a way that it could be marketed in different seasons. For instance; the movement increased in the summer season should be made sustainable through the winter season by ski tourism opportunities. A similar diversification could be provided by more developing culture tourism and supporting congress tourism.

To attract the national and international capital to the Region would increase the quality of the services and the product diversification and would ease the promotion and marketing.

A significant point that should be considered to provide all these is to arrange an easy transportation system for reaching to the Region and to provide the necessary infrastructure and equipping system.

2.4.2 Developing the Tours to the Region

To increase the number of tours to the Region and to arrange some part of the tours focused only to the Region should be a sectoral goal.

In this means, the travel agents and the tour operators of the Region should be more powerful and the agents should cooperate with the national and the international tour operators. These types of co-operations which are not widespread at the present time would ease the tour organizations.

In addition, for the promotion of the Region, participation to the national and international fairs, to strengthen the relations with the media, to communicate with the civil organizations in eco-tourism field and promotion by electronic means are important requirements that should be fulfilled.

2.4.3 Increasing the Individual Visits

As the interest to the Region increases, the individual visits made without a tour arrangement would also increase. However, to be able to attract the potential visitors, accommodation facilities and the other similar facilities have to use e-tourism opportunities. These facilities to make reservations and booking by electronic means would be of great importance.

In a similar manner, the travel agents should also make advertisements and promote the programs they have had organized by electronic means. This type of service which is not used at the present time, would increase the individual movement.

3 The Supply Side of Regional Tourism

Eastern Black Sea Region portrays many of the natural and cultural characteristics that will enable and support the development of the tourism sector, especially “alternative tourism”.

The Region would make progresses on tourism sector mobilizing those. However, the most important concerns on expected mobilization progress should be preservation of cultural and natural assets.

Existing potential gives possibility to differentiate tourism products. Those are shown below.

3.1 Natural Assets to Be Mobilized

The geography of the region emerges as four sub-geographies consisting of the Coastal Zone, Inner Zone, Mountains and Peaks and South Zone – Valleys. The substantial section of the population and the economic activities is concentrated in the coastal section. Access to the inner zones and the South section of the Region is difficult. Settlements in said sub-geographies are small with lower density. The higher sections of the region start from 2,500 meters and ascend up to approximately 4,000 meters. There are no areas that have permanent settlement areas in this section.

Natural and cultural richness and assets are located almost evenly dispersed manner on the Region. However, most important and known natural riches are located in the interior sections of the Region. The areas between the coast and the higher altitudes of Eastern Black Sea Mountains are mainly covered with dense forests and at some points the forests reach as high an altitude as 2,200 meters. The forests that house both spiked and leaf trees are important genetic sources and they cater for natural life. “Old forests” within the borders of Artvin and Rize provinces have world-wide recognition and importance. Forests of the

Kaçkar Mountain that transcends these two provinces and Karçal Mountain forests in Artvin are under conservation and protection with the declaration of “Kaçkar Mountain National Park”, “Sahara-Karagöl National Park” and “Hatila National Park”. “Altındere National Park” located in the province of Trabzon can be added to these. (Appendix E: Environmental Assets and Appendix F: Cultural Assets)

The coastal section between Ünye (Ordu) and Hopa (Artvin) is a blend of continuing dense greenery and small settlements that have integrated with this geography and vegetation. The areas outside the settlements areas are mostly steep hills sloping towards the coast and are covered with forests and tea and nut fields. On relatively flat areas the coasts are covered with gravel. Sandy beaches are very rare in the Region.

The settlements are situated along the coast with an average of 10–15 kms distance between two settlements. The urban sector that possesses the cultural and historical riches of the Region reflects the special distinguishing characteristic of the Region. This being so, today this traditional fabric in the settlements is largely disrupted.

3.1.1 Mountains, Forest and Rivers

Interior sections of the Region are plateaus together with forests. Grazing fields that make up the traditional plant of the plateaus cover the areas immediately after the forest zone. These areas that have traditional plateau way of life and where animal husbandry is common are located on the zone between 1,700 – 2,200 meters. These areas that create the traditional Black Sea plateaus and that are integrated with the forests present the most important tourism development opportunities in the Region.

Another potential is the areas that make up the highest sections of the Region, approaching altitudes of 3,900 meters. These high altitude areas are covered with rocks that are covered with seasonal flowers and together with ice formations, ice lakes and snow covered peaks they offer incomparably beautiful scenery. These areas cannot be reached by motorized vehicles and they can only be visited on foot. They offer splendid opportunities especially for climbing, photo-safaris, wild life inspection, etc.

The high slopes and peaks of the North Anatolian Mountains run parallel to the Black sea at a distance of 70-75 km to the coast. This zone is narrow with a steep and sharp gradient. This section, reaching an elevation of 3,900 meters from approximately 2,000 meters, is covered with grass at points, which becomes scarce as the elevation is increased to give a landscape covered with bare rocks, glaciers and ice lakes.

North Anatolian Mountains have different names as follows in the west to east direction; Giresun Mountains, Mt. Kaçkar, Mt. Yalnızçam, Mt. Alaca and Mt. Şavval and Soğanlı Mountains.

The elevation of said mountains mostly exceeds 3,000 meters and reaches peak levels. The highest peak is located at Mt. Kaçkar with 3,932 meter, which is the 4th highest point in Turkey. The northern slopes of Mt. Kaçkar Summit are considered as one of steepest walls in the world. Moreover, other peaks are located at Mt. Soğanlı with 3,353 and 3,194 meters, and Mt. Yalnızçam with 3,050 meter.

The mountains offer important potentials for skiing and other winter sports. Zigana Ski Center, located in the province of Gümüşhane on the main highway between Gümüşhane and Trabzon, is an important potential in this respect. Also, opportunities for skiing are being researched in such areas as Kümbet and Bektaş plateau groups in the province of Giresun. Kaçkar Mountains, on the other hand are being surveyed by international heliski organizers for opportunities regarding heliskiing.

Due mainly to climatic reasons the southern sections of the Region does not present dense vegetation. These sections can be named the “valley sections” due to such valley formations as Çoruh River basin in Artvin and Kelkit River basin in Gümüşhane. Çoruh basin is known for its steep and deep canyon and Çoruh River has world wide fame as a rafting center.

Besides these opportunities, in the northern sections of the Region considerable opportunities are offered by the rivers, especially by Firtina River. The rivers and bridges within the forests connect and integrate natural and cultural assets.

Another river is Kelkit River in the southern section of the Region. Even though Kelkit River does not flow through deep valleys as Çoruh River, it still possesses typical attractive rural sceneries.

3.1.2 Climatic Conditions – Four Seasons

Regional climatic conditions allow activities through-out the year, in all four seasons. This specialty is another advantage for the development of tourism.

The coastal zone reflect the typical Black Sea climatic conditions having annual average 13 °C temperature and 71% humidity. A moderate climate is dominant in general in the region.

Monthly average temperature is mostly similar at the coastal zone and the annual average varies between 13.7 and 14.2. The average temperature drops relatively at the inner sections of Artvin and Gümüşhane. Great differences in temperature do not occur between the summer and winter months. The highest difference is at Gümüşhane with 21.8 and does not reach beyond 20°C in other sections

The coastal area receives an annual precipitation in excess of 1,000 mm. Rize holds first position with 2,300 mm, followed by Giresun with 1,324 mm and Trabzon as third with 834 mm (Table 3). The general characteristics of the precipitation are similar in the region as a whole with dense precipitation in winter and less in summer.

As stated above, the Region lives through all four seasons. It should be noted, however, that when the regional climatic conditions are evaluated in terms of tourism activities, the shortness of the summer season and the relatively more number of rainy days limit the development of tourism types based on the sea and the sun. The fog on higher altitudes also limit the opportunities for skiing.

The mild climatic conditions with abundant rain and high levels of moisture have created the extraordinary natural vegetation and the old forests. The different sceneries offered by these assets during different seasons are very appropriate for all the types of nature oriented tourism activities.

3.1.3 Flora and Fauna

There is an extraordinary level of bio-diversification made possible by the climatic conditions and the natural structure of the Region.

3.1.3.1 Flora

The region has rich vegetation in terms of plant types. There are areas where unknown plant types grow at sections which are known or known little and the high sections which cannot be intervened. These areas have the characteristics of a “Biogenetic Reserve”. Biogenetic reserve areas which are unique areas, difficult to protect, constitute great significance for scientific tours at world scale. In the last 30 years, the demand of the

foreign countries, which is gradually growing towards the flora of the region has resulted in a decrease in the biogenetic riches of the region, and may lead to extinction in the event of failure in application of required measures (Appendix E: Environmental Assets).

3.1.3.2 Fauna

The region has become gene center and habitat of numerous wildlife species with its high mountains, deep valleys, abundant precipitation, rich and nutritive vegetation, and has become one of the areas where the immigrant birds stay for extensive periods. (Examples of the wildlife of the region have been presented in Appendix E: Environmental Assets) Some of these are close to extinction and some are continuing their life in the untouched forests. Due to the demand towards the fauna of the region just like its flora from foreign countries, the illegal and irregular hunting has led to reduction in numerous species and even the extinction. Possibility of simultaneous use of legal, administrative, institutional, financial and technical means must be created for hunting, wildlife and customs processes in a planned discipline.

3.2 Cultural and Historical Assets

Eastern Black Sea Region has been the cradle of different civilizations and cultures throughout the history. Its function as a gateway to Anatolia and to other Black Sea Regions, the commercial character of the Black Sea since the times of antiquity and its being on the route of the historical "silk road" have enabled the integration of many different cultures and emergence of a synthesized structure and cultural values. There are many remains such as regional monuments, tombs, bridges and settlements dating back to the different periods of the Greeks, the Romans, the Pontic, and the Caucasian rooted civilizations as well as the Turkish-Islamic period. Most of these are integrated with the natural environment within which they are located in.

The Region also portrays a mosaic of different religions. It is rich in terms of historical rock tombs, churches and monasteries and mosques. The construction techniques, materials used and layouts of these are endemic to the Region.

3.2.1 Traditional Way of Living (on process)

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.

These dispersed settlements and houses are structured in accordance to the geographical structure of the area. Dispersed agricultural fields, hilly and sloping geography and the abundance of water resources have resulted in the construction of rural houses and rural community buildings in the agricultural fields and with distance from each other. Sometimes there is a distance of one km. between each house.

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 is formed with the addition of the basic regional urban culture to these.

These authentic assets of the Region are more recognizable and more protected than elsewhere.

This dispersed pattern of settlements have also influenced the individual identities in the Region. The Region portrays a special character in terms of man-woman relationships and the role of the female within the society. There is a relaxed relationship between the man and the woman. The woman is involved in the works in the field and husbandry as well as household affairs and raising of the children.

The difficult natural conditions of the Region have also influenced the practical intelligence of the population. These difficulties and the necessities have resulted in the search of the most practical ways of overcoming these problems. Famous "Black Sea Jokes" reflect the humorous character of this practical intelligence.

In direct relationship with the way of life, the practical and simple food preparation and consumption patterns is the main character of the regional cuisine. Anchovy, cabbage and butter are the primary ingredients of the regional population.

Corn, even though it has arrived to the Region from other parts of the country, has also become an important ingredient. Also, and similar to Eastern Anatolia, meat and cheese are common in traditional cuisine.

The traditions with respect to food differ in interior sections of the Region. Especially in Gümüşhane, food is mainly based on crops.

The traditional cuisine of the Region is as follows: cabbage stuffing, cabbage roast, cabbage soup, cabbage pickles, chard twists, chard dish, chard kaygana, kuymak-muhlama, keşkek, anchovy, anchovy stew, rice with anchovy, anchovy kaygana (kargana), bread with anchovy, anchovy kuşi, fresh beans, laz pastry, acıka, beans kaygana, Black Sea pide, stinging nettle soup, corn bread.

Some areas are famous for their dishes. These are mainly the meatballs of Akçaabat, dried beans of Çayeli, rice of Kalkanoğlu, Faroz steamed fish, Trabzon sour mullet, Hoşmeri, Çamlıhemşin bread and potato roast and Vakfikebir butter.

The pides made according to the Black Sea method of cooking differ from others. These are namely Lamesli (with chard) pide, Hoholli pide, Pumpkin pide, Parsley and cheese pastry, Trabzon cheese pide, Sürmene pide, Minced meat pide, Anchovy pide.

The dessert dishes of the Region are pumpkin pie, home baklava, Burma dessert, Kocaman Gerdanı, Muska dessert, Dough dessert, Hamsiköy sütlac, Pepeçura.

3.2.2 Folklore and Traditional Dance and Music (on process)

The dances of Eastern Black Sea Region are peculiar to the Region. "Horon" which is played all over Eastern Black Sea Region and has a rapid playing style is the national dance of the Region. Like the other elements of the local culture, dance and music have also been affected by the hard topographic conditions of the Region. In Artvin and in the vicinity of Artvin, dances having the effect of Caucasian culture are also being performed. Taking the dances all over Turkey into consideration, "Artvin" represents a region solely.

The topographic and climatic conditions of Black Sea Region are an important factor for the “Horon” dance to be formed. The rapid and shaky figures of the dance show similarity with the famous fish of Black Sea Region, “hamsi”. The dance starts slowly and becomes more rapid as the play goes on. “Horon” is the most active dances of the world. Dances are performed with the accompaniment of drum and zurna (a reed instrument somewhat resembling an oboe) and “kemençe (small violin played like a cello)” which is an instrument specific to the region.

“Horon” dance consists of three sections named as “düz (smooth)”, “yenlik” and “sert (harsh)”. An interesting feature of the dance is that it is known and played by people of almost every age. This is not a situation existing in every part of the country. This special feature should be made a matter of primary importance and should be used for advertisement and promotion purposes.

In Artvin region, dynamic, active and attractive dances which show the characteristic of Black Sea Region are popular. Dances are generally performed with the accompaniment of zurna, accordion and drum.

There are also instruments peculiar to the Region used for performing the dances.

“Kemençe” is a stringed Turkish musical instrument. The belly of the instrument is made of mulberry, plum and juniper trees. “Tulum” is a Turkish wind instrument. The skin of it is formed of two sections as “Nav” and “Ağızlık (mouthpiece)”. It is made of lamb and goat skin in general.

“Tulum” is used in Trabzon, Rize, Erzurum, Kars, Northern and Eastern Anatolia Regions and Thrace Region in our country. In Thrace Region, the instrument is named as “Gayda”. All these instruments are specific to the Region and could be used for advertisement and promotion purposes.

3.2.3 History and Historical Assets

The first settlements in the Region extend as far back as the Stone Age. The excavations in the Region have revealed the hand tools and weapons belonging to the Stone Age period. Many different races have settled the Region.

The reference resources point out that the longest lasting rule in the Region was those of the Eastern Roman Empire and the Kingdom of Pontus. As a geographical name, the name Pontus usually refers to the eastern coastal areas of North Anatolia, but the location defined by this name has shown differences in time. The coastal hinterland of the rivers Yeşilirmak, Kızılırmak and Kelkit are regarded as traditionally Pontus and this has extended from Caucasia on the east to Sinop on the west along the coast of the Black Sea. In more recent times, this region is considered as the coasts of Samsun and Trabzon and their hinterlands. The region within which widely varying races with different roots, languages, dialects, beliefs and history have lived has entered under the domain of powers that have originated from Caucasia, from Caspian Sea and from the south. And has been the colonies of such powers as Phoenicians, Ionians, Alexander the Great and the Roman Empire. None of these have reached to high levels of social, economic and political institutionalization. During the colonial period, the Greeks have settled in the settlements along the coast and have lived together with the already settled people. One important example is the Miletian Greeks that have established colonial settlements in the coastal areas of the Region as well as in Marmara Region during 7th century B.C. After 670 B.C., Miletian Greeks have sailed into Black Sea through Bosphorus and have established settlements at locations suitable for trade and fishing.

Georgian races have ruled in different periods of the history especially in Artvin and the surroundings. Iberian Kingdom and Princedom of Baghrat have also established settlements on the eastern parts of the Region and have built structures that have stood until present day (i.e. Church of Ishan, Church of Barhal, stone bridges).

After the colonial period during the reign of the Persians and Alexander the Great, Pontus has been an administrative unit with boundaries changing over time. During its reign, the Pontus Kingdom (298 B.C – 63 B.C.) had powers enough to rival the Roman Empire in the east. After their dissolution, the Romans became the main power in the area and in Anatolia and Christianity began to extend into these areas. After the division of the Empire, Pontus became a part of the Eastern Roman Empire.

The major settlements of the Turks have emerged during the Seljuk rule that began in Anatolia after the War of Malazgirt. Before this war, some Turkish tribes have settled in the Region and have left important traces, especially with their tombstones, regarding their period.

After the establishment of the Anatolian Seljuk State, the Turkish population began to increase and cultural impacts began to emerge. The inner sections of the Eastern Black Sea Region have been under Seljuk rule. Such monuments as Kaleköy Castle in the district of Mesudiye in Ordu, mosques and tombstones have lived up to present time.

During the IV.th Crusades, the crusaders conquered Byzantium Empire. The grandchildren of Byzantium emperor Andronikos Komnenos I (Alexios and David) fled Istanbul and with the help of the Georgian Queen Tamara, established Komnenos Kingdom in 1204 at Trabzon. Their political survival rested on the cross marriages between them and the Seljuks and on the taxes paid to the Seljuks. The Komnenos Kingdom had its most successful period during the reign of King Manuel Komnenos I (1238 – 1265). He grew powerful with the silver quarries in Gümüşhane and on the silver coins of his era it was written “the most happiest”.

Komnenos Kingdom had to pay taxes to the Ottomans after Sultan Bayezid I conquered Samsun and its surroundings. During the reign of David Komnenos (1458 – 1461) the taxes were not paid and the previously paid taxes were asked to be paid back. The Kingdom also proposed alliances to the European nations against the Ottomans. The Region was conquered and became a part of the Ottoman Empire during the reign of Sultan Mehmet the Conqueror in 1461.

During the Ottoman Period Trabzon was under the rule of the princes and the governors of *sancaks*. The city was known as the City of Princes. Sultan Yavuz Selim was the governor here during his princedom (1491 – 1512) and his son, later to become the famous Sultan Süleyman the LawGiver, was born here.

Trabzon was transformed into a state in the 16th century after it was combined with the sancak of Lazistan whose center was Batum. Trabzon became the center of this new administrative unit. A large fire in 1867 destroyed most of the public buildings and the city was redeveloped afterwards. It became a province in 1868 and besides the central sancak, Lazistan, Gümüşhane and Canik sancaks were attached to this province. The whole Region became a part of the Ottoman Empire after Sultan Yavuz Selim conquered Artvin.

The Ottoman Empire during its period of decline, started losing some of its territories in 18th and 19th centuries especially in Balkans and in Caucasia due to wars with Russia. After the 1877 – 1878 War, the Ayestafanos Treaty signed on March 3, 1878, left Artvin, Ardanuç, Borçka, Şavşat and Kemalpaşa to the Russians as compensation for the war. Russia occupied Trabzon during the First World War (1916). The Russians started to pull out from

Anatolian soil after the Bolshevik Revolution of 1917. Artvin briefly became under Georgian rule after the Russians left. It became a part of Turkey 3 years later in 1921.

The Greeks that lived in the Region during the Ottoman Period continued their social and economic life until the beginning of the 20th century. During the 1923 population exchange between Turkey and Greece, Greeks from the Region made up most of the total 1.000.000 Greek people that migrated to Greece.

The Region carries the footprints of such a history. There are numerous historical and civil architecture monuments and structures that date back to different periods in history. These differentiate as castles, towers, religious buildings, bridges, mansions and residences. The areas where these monuments are abundant have been designated today as historical or urban conservation areas. Individual buildings or monuments are “registered” as historical assets. Appendix F: “Cultural Assets” gives detailed information regarding this issue.

3.3 Systems of Transport and Accessibility

One of the main problems of the Region is its distance to the main metropolitan and urban centers within the country. Besides this problem generated by the geographical location, there are topographical and geological difficulties encountered during the construction of highways, railroads and airports.

The regional transportation system, especially the transportation axes constitute a deviate of the Regional geography and form all conditions. The main backbone of the Region is the axis parallel to the coast. The state highway along the coast is being improved as “divided highway” between Ünye (Ordu) on the west and Sarp Border Gate (Artvin) on the east. The provincial centers Ordu, Giresun, Trabzon and Rize and the other important urban centers are located on this main axis.

The axes joining said axis in the north-south direction only access the inner sections and reach outside the region via the passages as permitted by the topographic conditions. The most important one is the Trabzon-Gümüşhane-Bayburt-Erzurum axis.

The other secondary axes in the north-south direction are; Hopa-Artvin, Artvin-Şavşat-Ardahan, Of-Çaykara-Bayburt, Rize-İkizdere-İspir (Erzurum), Giresun-Dereli-Şebinkarahisar-Tokat, Ordu-Mesudiye-Koyulhisar extension Tokat and Erzincan and Ünye-Akkuş-Niksar-Tokat roads. Although the physical and geometrical standards of these roads are currently not high, these shall support the expected tourism dynamism with future developments. The second axis in the east-west direction is between Artvin-Erzurum.

Airway transportation constitutes vital importance due to remoteness of the Region to metropolitans and large centers. Trabzon Airport is serving nearly the whole Region. Moreover, Ordu Province also benefits from Samsun-Çarşamba airport while Artvin province benefits from Erzurum Airport.

Although maritime transportation has great potential, it has lost its importance especially in terms of passenger transportation. There are no railroads in the region.

3.3.1 Access to Rural Areas

Another problem in the Region is the difficult access to settlements in the rural areas. In all provinces, access to the interior rural areas or plateaus are difficult and limited. The Regional topography and geology renders the road construction and maintenance and

repair efforts difficult. The geometrical and physical standards of the village roads are low mainly due to these reasons.

3.4 Results of Stakeholders Meetings

One of the major characteristics of the Development Plan Study is its participatory nature. A series of partners' meetings were held in the 6 provinces of the Region to find out the views and recommendations of the partners of the tourism sector and the people regarding the mobilization of the resources and elimination of the weaknesses and limits to development.

The agenda for these meeting are the items outlined above. Rural development, agro-industry and handcraft man-ship issues are also addressed and their existing and potential contributions towards the development of the tourism sector are assessed in workshops organized.

3.4.1 Definition of Areas with High Tourism Potential

One of the main outcomes of the partners' meetings is the definition of the areas with high tourism potential. The partners share the general view that there are opportunities in two distinct geographical sub-regions as the coastal section and the interior sections. The partners have state that the natural assets of the interior sections such as the plateaus, forests, rivers, lakes, caves can be subject to different types of eco- tourism and alternative tourism such as trekking, climbing, rafting, etc. (Appendix C: Stakeholders Meetings).

In a similar manner, opportunities provided by the coastal areas were listed. For the proper development of these assets such issues as organizing beach areas, alleviation of infrastructure problems and obtaining "blue flag" were voiced. It is also stated that the ports and fisherman's warfs are other assets that can be utilized.

A potential voiced by the partners but not adequately utilized is the historical and authentic urban fabric and individual structures. There are registered single structures and conservation zones especially in the provincial centers and in such places as Perşembe and Tirebolu. The potentials for the utilization of these assets were also discussed.

Another subject raised at the meetings is the opportunities provided by the regional folkloric assets. The Region has dance (horon), music, apparel, cuisine and other folkloric assets well known throughout the country. The humble and jokefull character of the people living in the Region is another asset to be added to these. Especially cultural tourism will benefit from the mobilization of these assets.

3.4.2 Marketing Methods

A weakness stated by the partners is the limited promotional activities According to the partners, the Region until present day has been tried to be promoted by using the traditional methods of marketing and promotion, i.e. brochures, pamphlets and posters.

Many issues regarding effective and successful promotion and marketing were raised during the meetings. These include establishing contacts with tour operators, strengthening the regional travel agents and your operators, strengthening the relations with the media, attending international tourism fairs, promoting local festivals, getting support from the people that live elsewhere but have family ties with the region and public and private partnerships.

3.4.3 Strengthening the Institutional Framework and Increasing the Institutional Capacities

The partners have claims towards the development of the institutional framework and increasing the institutional capacities. Many expectations have been voiced such as improvements in infrastructure promotion, better transport systems, training regarding tourism and the environment. Increasing the institutional capacity as a requirement for achieving these is also voiced. The important point here is the view of most partners that these can be achieved through increases in the financial capacities of the public sector.

The partners have also voiced that at present, the level of cooperation and support between the partners at the regional scale is limited and inadequate. They also have voiced that they are not optimistic regarding the establishment of such cooperation and support in the short term. Examples regarding cooperation between the local governments in issues such as infrastructure provision and social services were discussed but it was stated that the previous experiences in this respect were unsuccessful.

The importance of public/private sector partnerships is also addressed but it was also stated here that the previous experiences were unsuccessful.

3.4.4 The Need to Develop Human Resources

One of the important subjects discussed during the meetings was the need to develop human resources and increase of know-how through proper training. Both public and private sector representatives voiced this. The representatives of the tourism facilities that are under operation stressed their need for trained manpower. However, it was also stated that they cannot financially support such training activities and they expect the public sector to undertake these responsibilities. The partners also stated education and training needs at the level of the workplace, i.e. on the job training besides the traditional methods of education and training.

3.5 Evaluation of Tourism Supply and Recommendations

The main requirements for the proper development of tourism in the Region are product differentiation and development, creating and promoting successful images of the products, product marketing, institutionalization and development of human resources.

3.5.1 Product Development and Creation of the Product Image

The rich cultural and folkloric assets of the Region provide appropriate environments for the creation of successful product images. This is a potential and an opportunity to be utilized. An example to this is the appropriate organization for the festivals in the Region that give message of peace and brotherhood with local music and dances and local food. Some of the foreign initiatives that market the Region with its opportunities for nature tourism and sports have included the local dance (horon) and music in their web sites. This can be a powerful tool for the local tourism operators as well.

3.5.2 Product Marketing

It can be observed that today the cultural and natural assets of the Region are not sufficiently promoted and marketed. As stated in the section 2.4.2 of this Report, special campaigns are required for successful image making, promotion and marketing of these products.

These campaigns shall utilize different media channels and should respond to the expectations and choices of different target groups.

Current modern techniques should be employed in these campaigns that will give emphasis to the tourism products in which the Region has comparative advantages. As examples to these the utilization of e-tourism opportunities, establishing web sites, sales and reservations on the internet can be stated

The promotion activities will be special to the Region through the utilization of modern techniques that give emphasis to the regional cultural, natural and folkloric assets.

3.5.3 Institutionalization

The existing bottlenecks associated with insufficient institutional frameworks should be alleviated with priority. It is a must that the partners in the sector should be formally organized and institutionalized for proper cooperation and development. One the main reasons behind today's unsuccessful attempts at promotion and marketing is the non existence of relevant institutionalization.

This institutionalization can be in the form of establishing cooperatives or associations as well as commercial companies based on public – private sector partnerships

On the other hand, formation of the unions of local authorities will enable joint efforts especially in terms of infrastructure provision and thus the provision of productive and relatively cheap communal services the tourism sector requires.

3.5.4 Development of Human Resources

The facilities and service providers in the Region have pointed out the need for trained human resources. Tourism is one of the sectors that relies on adequate human sectors most. And high level of know-how is a precondition to the provision of quality service.

In order to properly develop the human resources of the Region, appropriate utilization of all training and educational programs are required. There are important potential contributions from the regional universities and higher educational facilities. Also middle level schools geared towards the needs of the sector can be established.

Comprehensive training shall be provided by the partners of the sector and their relative organizations. At this stage, it is proposed and recommended that the existing resources shall be utilized to their full extent and that training and education programmers targeting the female population should commence.

4. Proposed Tourism Development of the Region

The East Black Sea Region Tourism-Oriented Development Plan has been elaborated moving from two major starting points.

The first one of them is the proposals included in the East Black Sea Regional Development Plan (DOKAP) prepared previously. DOKAP associated the sector development with the development and diversification of tourism products, the promotion of products and finally the marketing of them, and produced development strategies for three issues. In this study, these three issues are addressed and, principally, DOKAP proposals are further developed and detailed.

The second starting point is the assessment of the sector in terms of demand, supply, institutionalization and human resources. The sector could launch an onset only in line with

decisions that embrace all these aspects, proposed according to the concept of total development.

4.1 Tourism Development Policy and Strategies

The tourism sector development necessitates a series of political and strategic interventions. In this context, firstly policy decisions were formulated in the study, followed, in association with them, by the determination of a bunch of strategic measures. As an extension of them, detailed development proposals were prepared for a certain development corridor and areas.

4.1.1 Tourism Development Strategies

Tourism sector development policies have to be elaborated considering internationally recognized concepts. These decisions must also be adopted by all partners of the sector. Outlines of the development policies were determined so as to incorporate all issues addressed and suggested at the meetings of the Steering Committee and the Partners.

In this context, the first starting point was the fact that the tourism sector is considered as an important source of revenue and employment in all economies and that it causes a multiplication effect on other sectors.

Another recognized fact is that the tourism sector has a highly frail demand. In addition, service is provided according to the principles of total quality and consumer satisfaction is highlighted in the sector. The sector's elasticity of demand is high. This stresses the importance of the preparation of a marketable tourism product and the product diversification.

The sector's horizontal relationships are wide-spread and it has too many relations with other sectors. For example, its relations with the sectors of transportation and communication, commerce, banking and social services are at a high level. Furthermore, tourism activities have multiple actors. In the tourism sector, service supply necessitates the collaboration and solidarity of private and public sectors the tourism.

The sector development policies were formulated in line with the basic explanations above and by detailing them.

4.1.1.1 To Use Tourism Sector As a Means For Regional Economic Development (Policy:1)

Tourism sector is one of the leading sectors in the rapid growth of the country in the last twenty years. The sector has contributed greatly to the country's economy in terms of both the added value it creates and the employment potential it provides.

The share of the sector in the Gross Domestic National Product has increased to 3.80% in 2000 from 2.80% in 1985. Income acquired from the sector has increased in excess of the income of other sectors and tourism has become one of the locomotive forces of the country's economy (Table: 14).

Table 14: Share of Tourism Receipts in the Gross National Product (by Current Consumer Prices)

| Years | Gross National Product | | Tourism Receipts | % Share of Tourism Receipts Gross National Product |
|-------|------------------------|------------|------------------|--|
| | Million TL | Million \$ | Million \$ | |
| 1985 | 35,350,318.4 | 52,597.6 | 1,482.0 | 2.80 |
| 1986 | 51,184,759.3 | 75,173.0 | 1,215.0 | 1.60 |
| 1987 | 75,019,388.1 | 85,979.0 | 1,721.1 | 2.00 |
| 1988 | 129,175,103.7 | 90,460.0 | 2,355.3 | 2.60 |
| 1989 | 230,369,937.1 | 107,544.0 | 2,556.5 | 2.40 |
| 1990 | 397,177,547.4 | 150,758.0 | 3,225.0 | 2.10 |
| 1991 | 634,392,841.0 | 150,168.0 | 2,654.0 | 1.80 |
| 1992 | 1,103,604,909.0 | 158,122.0 | 3,639.0 | 2.30 |
| 1993 | 1,997,322,597.4 | 178,715.0 | 3,959.0 | 2.20 |
| 1994 | 3,887,902,917.0 | 132,302.0 | 4,321.0 | 3.30 |
| 1995 | 7,854,887,167.0 | 170,081.0 | 4,957.0 | 2.90 |
| 1996 | 14,978,067,283.0 | 183,601.0 | 5,962.1 | 3.20 |
| 1997 | 29,393,262,147.0 | 192,383.0 | 8,088.5 | 4.20 |
| 1998 | 53,518,331,580.0 | 206,552.0 | 7,808.9 | 3.80 |
| 1999 | 78,282,966,809.0 | 185,267.0 | 5,203.0 | 2.80 |
| 2000 | 125,970,544,468.0 | 201,217.0 | 7,636.0 | 3.80 |

Source: Bulletin of Tourism Statistics, 2000, Ministry of Tourism, Publication No: 2001/1, Ankara

Tourism revenues also provide a significant contribution to the balance of payments of Turkey. To give an example, the ratio of tourism revenues to export revenues is gradually increasing in Turkey.

Annual average growth rate of the tourism income has been 0.115 in the 1985-2000 period. The ratio of the income acquired from the sector to exports has increased to 28% in 2000 from 19% in 1985.

These figures indicate the increased importance of the tourism sector in the national economy.

Table 15: Rate of Tourism Receipts in the Export Earnings and Tourism Expenditure in the Export Expenses (million US \$)

| Years | Exports | Tourism Receipts | Rate of Tourism Receipts in the Import Earnings | Imports | Tourism Expenditure | Rate of Tourism Receipts in the Import Expenses (%) |
|--|---------|------------------|---|---------|---------------------|---|
| 1985 | 7,958 | 1,482 | 19 | 11,344 | 324 | 3 |
| 1986 | 7,457 | 1,215 | 16 | 11,105 | 314 | 3 |
| 1987 | 10,190 | 1,721 | 17 | 14,158 | 448 | 3 |
| 1988 | 11,662 | 2,355 | 20 | 14,335 | 358 | 3 |
| 1989 | 11,625 | 2,557 | 22 | 15,792 | 565 | 4 |
| 1990 | 12,960 | 3,225 | 25 | 22,302 | 520 | 2 |
| 1991 | 13,593 | 2,654 | 20 | 21,047 | 592 | 3 |
| 1992 | 14,715 | 3,639 | 25 | 22,871 | 776 | 3 |
| 1993 | 15,345 | 3,959 | 26 | 29,428 | 834 | 3 |
| 1994 | 18,106 | 4,321 | 14 | 23,270 | 866 | 4 |
| 1995 | 21,636 | 4,957 | 23 | 35,709 | 912 | 3 |
| 1996 | 23,225 | 5,962 | 26 | 43,627 | 1,265 | 3 |
| 1997 | 26,261 | 8,089 | 31 | 48,559 | 1,716 | 4 |
| 1998 | 26,973 | 7,809 | 29 | 45,922 | 1,754 | 4 |
| 1999 | 26,588 | 5,203 | 20 | 40,692 | 1,471 | 4 |
| 2000 | 27,485 | 7,636 | 28 | 54,150 | 1,711 | 3 |
| Annual average increase rate (1985-2000) | 0.086 | 0.115 | | 0.110 | 0.117 | |

Source: Bulletin of Tourism Statistics, 2000, Ministry of Tourism, Publication No: 2001/1, Ankara

A similar assessment may be realized in terms of employment. Assuming that employees of hotel-restaurants are representing a substantial portion of the tourism sector employment

as a sub-group of activity of the trade sector, the employment in the sector has reached 16 221 in 2000 compared with the 6,870 in 1970 (Table:16).

The share of hotel and restaurant employees in total employment is 1.39 of the regional total, while the figure was only 0.61 % in the year 1967.

In the period of 1970-2000, the annual average growth rate of Hotel and Restaurant sub-sector (4.59 %) is higher than the Regional total employment growth rate (1.82 %). Regional employment growth rate of the tourism sector is also higher than the country's average (3.3 %).

Table 16: Sectoral Regional Employment in the Period 1970-2000

| Years | Agriculture | Mining | Manufact. | Elect. Gas, Water | Const. | Trade | | Trans. & Comm. | Financial Serv. | Public Serv. | Total |
|---|-------------|---------|-----------|-------------------|--------|--------------------|--------------------------|----------------|-----------------|--------------|-----------|
| | | | | | | Retail & Wholesale | Hotels & Restau. | | | | |
| 1970 | 917,240 | 4,118 | 59,000 | 672 | 22,315 | 18,663 | 6,870 | 15,951 | 4,160 | 75,577 | 1,124,566 |
| 1975 | 973,813 | 2,369 | 52,648 | 244 | 26,827 | 27,506 | No information available | 23,061 | 5,330 | 70,341 | 1,182,139 |
| 1980 | 1,003,270 | 1,916 | 80,991 | 1,104 | 34,408 | 28,370 | 8,608 | 24,892 | 10,156 | 102,881 | 1,296,596 |
| 1985 | 1,034,173 | 1,701 | 78,137 | 744 | 32,349 | 38,984 | 11,407 | 29,920 | 11,016 | 114,845 | 1,353,276 |
| 1990 | 981,534 | 1,596 | 81,232 | 3,059 | 50,081 | 44,780 | 13,521 | 33,975 | 13,842 | 130,820 | 1,354,440 |
| 2000 | 900,525 | 2,158 | 63,767 | 3,249 | 59,319 | 58,283 | 18,221 | 30,054 | 19,360 | 159,485 | 1,314,421 |
| Sectoral Distribution of Employment in the Region (%) | | | | | | | | | | | |
| Years | Agriculture | Mining | Manufact. | Elect. Gas, Water | Const. | Trade | | Trans. & Comm. | Financial Serv. | Public Serv. | Total |
| | | | | | | Retail & Wholesale | Hotels & Restau. | | | | |
| 1970 | 81.56 | 0.37 | 5.25 | 0.06 | 1.98 | 1.66 | 0.61 | 1.42 | 0.37 | 6.72 | 100.00 |
| 1975 | 82.38 | 0.20 | 4.45 | 0.02 | 2.27 | 2.33 | 0.00 | 1.95 | 0.45 | 5.95 | 100.00 |
| 1980 | 77.38 | 0.15 | 6.25 | 0.09 | 2.65 | 2.19 | 0.66 | 1.92 | 0.78 | 7.93 | 100.00 |
| 1985 | 76.42 | 0.13 | 5.77 | 0.05 | 2.39 | 2.88 | 0.84 | 2.21 | 0.81 | 8.49 | 100.00 |
| 1990 | 72.47 | 0.12 | 6.00 | 0.23 | 3.70 | 3.31 | 1.00 | 2.51 | 1.02 | 9.66 | 100.00 |
| 2000 | 68.51 | 0.16 | 4.85 | 0.25 | 4.51 | 4.43 | 1.39 | 2.29 | 1.47 | 12.13 | 100.00 |
| Annual Average Employment Growth Rate in the Region | | | | | | | | | | | |
| Years | Agriculture | Mining | Manufact. | Elect. Gas, Water | Const. | Trade | | Trans. & Comm. | Financial Serv. | Public Serv. | Total |
| | | | | | | Retail & Wholesale | Hotels & Restau. | | | | |
| 1970-1980 | 0.0082 | 0.0178 | 0.0437 | 0.0857 | 0.0590 | 0.0521 | 0.0389 | 0.0398 | 0.0728 | 0.0338 | 0.0205 |
| 1980-1990 | 0.0123 | -0.0010 | 0.0348 | 0.0927 | 0.0447 | 0.0545 | 0.0572 | 0.0385 | 0.0629 | 0.0297 | 0.0236 |
| 1990-2000 | 0.0002 | -0.0304 | 0.0165 | 0.0202 | 0.0010 | 0.0272 | 0.0417 | 0.0096 | 0.0408 | 0.0277 | 0.0107 |
| 1970-2000 | 0.0069 | -0.0048 | 0.0316 | 0.0657 | 0.0346 | 0.0445 | 0.0459 | 0.0292 | 0.0587 | 0.0304 | 0.0182 |

Source: Social and Economic Characteristics of Population, 2000 Population Census, State Institute of Statistics,

The explanations above point to the importance of the sector for both Turkey and the Region. Tourism is an important sector to increase the regional income. Furthermore, it provides increased employment.

With the development of the tourism sector, the income of the Regional people will increase. As, however, alternative tourism activities are rather carried out in rural areas, developments in alternative tourism will cause increased income and employment in the rural sector, thus providing economic contribution to relatively disadvantageous sections of

the public. Furthermore, a developed rural tourism will create additional opportunities for employment in other sectors, principally including agricultural products and handicrafts.

On the other hand, the development of alternative tourism will increase demand for rather modest facilities. In such case, the initial installation cost will be reduced and, per contra, the social capital will have to be increased. The sector's manpower requirements and training programs must be arranged accordingly.

4.1.1.1.1 To Invite Investments From Outside (Sub-Policy: 1.1)

The sectoral development and particularly facility construction require a large amount of investment. A relatively less developed nature of the Region and bottlenecks in capital development mandate capital investment from outside the Region.

In addition to the existing Ministry-certified guest beds in the region, it is predicted that approximately 25,000 (forecasting result: 24,817) guest beds more will become eligible for certification by the Ministry in the planned period (Appendix H: Financial Aspect of Tourism Sector Development and Investment).

It is estimated that The total amount of investments that must be made by the private sector for accommodation facilities is around 300 Million US\$. In the planned period. With these investments, approximately 30,000 guest beds will be serving to the tourism sector at the end of the planned period, as distributed above, offering accommodations for about 2 millions of national and foreign visitors.

With the contribution to public sector investments for especially transportation, infrastructure and land development works, the total investment to for development of tourism and eco-tourism rises to about 400 Million US\$. This figure means an average investment of 19 Million US\$ per year.

The accomplishment of an investment of this size by Regional investors seem highly difficult. For this reason, non-Regional investors must be attracted to the Region. As a matter of fact, one five-star hotel and one four-star hotel existing in the Region were installed by non-Regional investors.

A suitable milieu should be provided to urge national and international capital to go to the Region. From early 1980s, Turkey has an experience in and chances for attracting foreign capital to the tourism sector. This experience and applicable approaches should also be used in the Region.

Especially the coastal zone should be dwelt on for capital attraction. Also taking into consideration the business tourism opportunities offered by the coastal zone, the urban communities located on the coast would be more attractive for foreign capital. During the initial phase, the Regional cities such as Trabzon and Ordu, which have shown an onset in economy and particularly in the manufacturing industry would be attractive for non-Regional investors.

Non-Regional investments should also be encouraged in inland sections of the Region, where types of alternative tourism could develop. One should avoid wrong thoughts that non-Regional investors would not take care of the nature in areas that are highly environmentally sensitive. It should be remembered that, specifically with types of alternative tourism such as green tourism, eco-tourism, etc which cause dynamism by highlighting natural assets, non-Regional investors take care to conserve such assets and incorporate know-how and environmental awareness in local people.

4.1.1.1.2 Opening New Markets for Regional Tourism Products (Sub-Policy: 1.2)

An active marketing of the tourism product and entering new markets should be another developmental policy for the tourism sector.

Product development strategies in the tourism sector require detailed market research. Plans and applications based on “assumed” demand usually result in failures.

The tourist interviews conducted during the Study show that approximately 70% of the tourists base their selections on formal information resources besides recommendations from others. This underlies the importance of marketing.

Marketing activities are more difficult than operational activities in the sector and require important levels of information and professionalism. It is recommended that respectable tour operators or travel agencies should be worked with in order to undertake successful domestic and international marketing.

The contacts and partnerships with international travel agencies or tour operators should be initiated by the existing travel agencies, the organizations of operators or other NGO's to be established.

The first step in this process should cover the presentation of the Regional product portfolio to these travel agencies and/or tour operators. This product portfolio should be finalized after the review by the selected firms and then presented to the market.

The Region is a candidate for a market activity within which natural and cultural resources are the products. In opposition to mass tourism trends of the past that was based on sun, sea and sand, alternative tourism types, based on natural and cultural riches are continually gaining more and more interest on a world scale. The Region should receive its share of this interest and market.

The size of the Region and the diversity of opportunities it offers is suitable for mass tourism in the coastal zone and alternative tourism particularly in inland zones. In the context of marketing strategies to be followed for the East Black Sea Region, the following is proposed.

4.1.1.1.2.1 To Invite People From Outside - New Markets For Regional Tourism Products

Inadequacies exist in the marketing efforts both in foreign markets as well as in domestic market. There is no immediate requirement inducing a large market domestically but new markets seem necessary in foreign countries. In this respect, a renewed framework is necessary for the operation of foreign and local tour operators and agencies.

The important issue is the low level in the number of foreign arrivals. At one end the regional resources cannot be transformed into tourism products and thus domestic and foreign markets cannot be accessed; and on the other end, the capacity limits exist on the resources under utilization. In other words, the regional potential, at some places, is not open to domestic and foreign markets. An example to this situation is the interior sections of Ordu and Giresun. On the other hand, on some products, there is extensive demand that threatens the eco-system and the environment (i.e Uzungöl).

Foreign tourism is more intensive in the eastern sections of the Region as compared to the western sections. These are limited with cultural visits to Sumela in Trabzon, Trekking activities in Uzungöl and in the plateaus of Artvin and Rize, Peak climbing at Mount Kaçkar

and rafting at Çoruh River. Product differentiation level is low in spite of the high potential portrayed.

Most of the visits to the Region by the foreigners is through tours organized in Eastern and Southeastern Anatolia. The number of tourists arriving by tours with the East Black Sea as the destination and individual arrivals is low. This situation further stresses the need for institutionalized marketing.

Foreign markets need to be researched and institutionalized marketing conducted for improving the number of foreign arrivals to the Region.

Today, it is observed that a major portion of foreign visitors are from countries located by or near the Black Sea and from some West European countries, Israel and USA. To this list, other countries should be added, principally including Japan and the Far Eastern countries, EU member or would-be member countries and other European countries. For the short run, the composition of foreign tourists visiting Turkey could be taken as a target.

However, private carrying organizations, e.g. Turkish Air Lines and similar others must also provide support to search for new markets with suitable promotions and to campaigns. A similar promotional campaign should also be carried out through the overseas representations of the Ministry of Culture and Tourism.

The definition of the product to be marketed should be based on the preferences and demands of the foreign visitors. As stated above, the product portfolio should be prepared by the organizations in the sector. NGO's, public administration and academic organizations will undoubtedly assume important roles in the process but the main responsibility is with the partners in the sector, through their institutions.

Another opportunity for the marketing of Regional tourism products is cooperation with foreign operators and investors. Such an opportunity requires the necessary frameworks for foreign capital to invest in the Region. In such cases, international marketing will be conducted by the foreign partner. This opportunity can be utilized especially in urban areas located on the coast. In Interior sections and in areas where eco-tourism is the main potential, this should be evaluated with scrutiny. Localization should not be seconded to interests regarding the local and international capital.

4.1.1.1.2.2 Participation in National and International Tourism Fairs

Actions should be taken to find new international markets for the sector. One of the most important ones of such actions would be an effective promotion and actual interaction with market stakeholders.

In order to accomplish the above, the sector should participate in international tourism fairs and exhibitions for PR and promotional activities in foreign markets. Berlin (ITB), London (WTM), Milan (BIT), Madrid (FITUR) and Moscow (MITT) fairs and exhibitions are the most important ones in this respect. Effective support to participating entities are provided by the Ministry of Culture and Tourism, Turkish Association of Travel Agencies, and Turkish Airlines. Participating in specialized fairs and exhibitions, though they may be smaller in scale, should also be under consideration.

On the other hand, the relationships with the tour operators and travel agencies that work or will work together should be continuous and intensive. These organizations can give or take priorities to destination areas during marketing and sales. The same fragile structure that can be observed in the sector in general can also be observed in the representatives of these organizations.

4.1.1.1.2.3 Contemporary Measures for Promotion and Marketing, e-tourism Possibilities

The technological developments have added an electronic dimension to PR and promotion. CDs, DVDs, video tapes and especially the internet are today's most intensively used promotion tools. As such, a web site under name dokap.net is being constructed under the scope of this Study. The Region should extensively benefit from the utilization of this tool. In this respect, travel agents, accommodation facilities and other entities in the sector should utilize internet for their promotional activities.

The Region should utilize this opportunity as much as possible. In this context, all parties to the sector, principally including operating travel agencies and accommodation facilities must carry out promotional activities via internet.

- Certain firms which market the Region predominantly for rafting, Kaçkar Mount climbs and treks and civilian formations in Turkey and England utilize e-tourism possibilities even today¹.

4.1.1.1.3 to Increase Tourism Demand to Region (Sub-policy: 1.3)

All available possibilities should be used to increase demands for the Region. These are explained below.

4.1.1.1.4 to Use Size and Diversity of Region As Means To Reach Different Target Groups (Sub-policy: 1.4)

The large size of the planned area and the diversity of its potential enable to increase demands for it and market it to varied target groups. The resources referred to in Section 2 of the Report could attract the interest of groups of differing ages or social statuses who have differing expectations.

To increase demands, different marketing methods must be used. What needs to be emphasized here, however, is that the promotional programs should underline the mosaic of assets existing in the Region.

Urban settlements particularly located in the coastal zone of the Region have significant cultural accumulations. In the planned area, the seats of four of the six provinces are located on the coast. The territories of five provinces also include a coastal zone. Coastal settlements and particularly provincial centers have peculiar urban fabric and cultural amenities, principally including museums and registered individual buildings.

These possibilities will enable the development of urban and cultural tourism in the coast. These are listed below.

- Cultural tourism (museums, sites, individual historic buildings, belief tourism)
- Possibilities for congresses/meetings,

¹ Web sites of some of them are shown below. Such initiatives must be extended.

- <http://runnertourism.com/Kackartrek.html>;
- <http://www.greentours.co.uk/holidays/location/ponticalps.asp>;
- <http://www.middleearthtravel.com/kackar04.htm>;
- <http://www.outer-edge.com/turkey.html>;
- <http://www.tourarium.com/tourarium/blacksea/trabzon/tours/KDN004.htm>;
- <http://www.tourarium.com/tourarium/blacksea/trabzon/main.htm>;
- <http://www.tuncfindik.com/html/rehberlik.html>;
- <http://www.kackarmountains.com/trek.htm>

- Development of business tourism,
- Development of coastal zone activities, possibilities for sea tourism, yachting tourism, water sports,
- Social tourism, ethnographic tourism,
- Others

In the coming years, tourism activities in the urban areas are expected to grow further. Such growth could attain the size of a mass tourism. In order to accomplish such development, urban fabrics owned by coastal communities must be enlivened, individual buildings must be made available to the tourism sector, and all cultural assets and amenities, principally including museums, must be publicized. As a result of such campaign, both the belief tourism and ethnographic tourism and the business tourism, principally including meetings and congresses, could show development.

Another development potential that must be encouraged in the coming years would be the sea-dependent activities in the coastal zone. In this context, beaches particularly located between the provincial boundary of Samsun and Çamlık (Ünye of Ordu) and in Bulancak (Giresun) and Kemalpaşa (Hopa of Artvin) could attract visitors more intensively and could be provided with facilities.

Yet another development potential in the coastal zone is the yachting tourism. In the middle and long runs, possibilities for vessel landing and maintenance in the existing ports and fishermen's shelters are expected to grow. To this end, it is envisaged that necessary physical arrangements must be made in the said facilities.

Rural tourism provides large opportunities particularly in inland zones of the Region. Such zones could accommodate all the types of tourism referred to below.

- Eco-tourism
- Farm tourism, ethnographic tourism,
- Nature-seeing, trekking, mountaineering, climbing, etc
- Rafting, canoeing, amateur fishing,
- Botany, plant identification, bird observation, etc
- Photo-safari,
- Skiing (winter)
- Others

Rural area tourism is at least as important as the urban area tourism. However, rural tourism development strategies should be formulated by taking into consideration the extraordinary environmental sensitivity of rural areas.

In terms of both site selection and types of necessary facilities, alternative tourism will differentiate significantly from mass tourism and from activities on the coast.

Recommendations for a detailed assessment of the potentials available in urban and rural areas are explained point by point with tourism development corridors in relevant sections of the Report, distinguishing between the coastal zone and the inland zone.

4.1.1.1.4.1 Integrated Tourism Operations with Adjacent Regions

Another possibility that might increase demands for the Region is the potentials of provinces adjacent to the Region. In this context, the utilization of the potentials in neighboring provinces should be realized and joint tours are to be organized for Eastern Black Sea and Eastern Anatolia Regions. When the opportunities regarding winter sports and culture tourism are accounted, Eastern Anatolia emerges as a important potential. In

this respect, Palandöken (Erzurum), Mount Kop (Bayburt), Sakaltutan (Erzincan) and Sarıkamış (Kars) ski centers have the necessary technical facilities and some have accommodation facilities. Yalnızçam (Ardahan) ski center which is not yet developed also portrays a high potential for development.

Cultural inventory of the Eastern Anatolia Region is also an important opportunity. The ruins of Ani from Urartu period and the Castle of Kars (Kars); Çifte Minaret, protected emplacement (Tabya), Castle of Ardahan and ruins near Lake Çıldır (Ardahan) are already within the tour programs of present day tours. Utilization of these opportunities together with the inventory of the Region will make the tours more attractive as well as increasing the potentials in the Region.

4.1.1.1.4.2 Integrated Tourism Operations with Adjacent Countries

Utilization of the potentials that exist in the countries located on the coast of the Black Sea and introduction of cruise liners is also an opportunity to be exploited. Even though the ex-Soviet countries still portray major economic difficulties, they have important capabilities and assets in tourism. Some of the tourism areas of these countries have been marketed in Eastern Europe. It is possible to market the Region together with Ukraine, Russia and Georgia through international tour operators. Eastern Black Sea ports can be incorporated into the programs for visiting Odessa, Sivastopol, Simferopol, Yalta, Sochi and Batum and cruise liners can visit these centers. In larger scale Black Sea tours Regional ports can be visited together with such centers as Varna and Burgaz in Romania and Bulgaria.

Georgia and Russia need special attention in terms of international tourism. By utilizing the opportunities to be provided by the Black Sea Divided Highway, tourists can be attracted through Batum Airport and from the coastal zones in these countries. This opportunity will present itself as a major one in the development of international tourism in the Region and Sarp border gate is expected to be a major gate for tourism.

4.1.1.1.4.3 to Increase Public and Private Partnership and Solidarity Between Stakeholders

A critical and necessary precondition for the Region to develop in tourism is proper institutionalization and public and private sector partnership in counties with developed tourism sector, have fulfilled above conditions. Sector is mainly managed and supervised by the institutions that are established jointly by the partners in the sector.

The role of the public sector in the development of tourism can be summarized as setting down the general policies, guidance and supervision. Besides these, the public sector in the Region has assumed the responsibilities for the provision, operation and maintenance of infrastructure and partial promotional activities.

The facility provision and service is within the domain of the private sector. Such areas as PR and promotional activities, marketing, auto-control, design of local tourism development policies and operation of some of the infrastructural services should be assumed by the institutions jointly established by the sector partners.

For the sectoral development, these roles should be maintained as well as joint efforts should be enhanced and the private sector should input managerial and financial contribution to works being accomplished by the public sector. Such an understanding requires a formal cooperation of the public sector and the private sector.

Examples of the model of cooperation between public and private sectors referred to above also exist in Turkey.²

Establishment of similar organizations and institutions geared towards the development of tourism is a necessary precondition in the Region. Associations or cooperatives are easier to be established relatively developed tourism attraction centers in the Region such as Ayder, Uzungöl and Yusufeli.

On the other hand, it is highly recommended that those settlements that are in close proximity of each other and that share the same resources (e.g. Fatsa-Ünye, Perşembe-Ordu, Akçaabat-Trabzon) establish unions. These unions besides provision and operation of infrastructure can also be active in training in environmental issues and in tourism.

4.1.1.2 Considering Tourism as a Regional-Income Increasing Activity and Using Local Initiatives for Its Development (Policy 2)

Development of the tourism sector through local initiatives should be a major political choice. In this context, institutionalization must be improved in the Region, which is currently inadequate. A second important issue is that developments should be scheduled in phases and in line with demands. Such an approach would both reduce the initial installation cost and preclude inert capacity creation.

4.1.1.2.1 Improving and Institutionalizing Local Initiatives (Sub-Policy: 2.1)

One of the leading tasks to be done in the Region is the strengthening of local initiatives.

Power of local initiatives in existing tourism areas are extremely insufficient. Central and local administrations are expected to provide these services.

There is no institutionalization for PR, promotion, establishing relationships with third parties other areas and devising policies for appropriate development. It is also observed that the division of roles and responsibilities as outlined above is virtually non-existent in the Region³.

In the Region, the level of organization of the sector partners is extremely low. This fact was expressed at the Meeting of Partners. These meetings desired that almost everything required for the sectoral development should be done by the public sector.

This situation is a natural result of current level of sectoral development. Establishing proper institutions should be a central strategy for the short term. In this respect, possible institutionalization, with examples from other places in the country, are given below:

- i. It is possible to bring together the owners and operators of tourism facilities, representatives of local trade and handicrafts and local administration under a local association with the goal of developing the sector.

² An example to this is Sarıgerme Environmental Training Association (SARÇED) in the district of Ortaca in the province of Muğla. The co-founders of SARÇED are from private sector, NGOs and representatives of public institutions. The Association deals with many issues regarding the training in environmental protection, tourism and urban development. The main source of income for the Association is the beach and car parking revenues.

³ An example, to the provision and operation of infrastructure in areas other than relatively developed zones such as Ayder and Uzungöl are also very inefficient. In most areas these services do not exist. In very few areas these services are insufficiently provided by the Municipalities or by the "muhtars".

- ii. Another model for institutionalization is establishment of cooperatives. Such cooperatives can be established by the owners or operators of small scale facilities⁴.
- iii. More complex and structured institutionalization will be required for those places where tourism is relatively more developed and dispersed into wider areas. Those local authorities that jointly utilize the natural and cultural resources or sharing the same water resources or discharging wastes into the same locations can form unions for the provision and operation of infrastructure⁵.

This model of establishing unions for joint objectives is also common in other countries⁶.

One of the near future possibility for regional and provincial level institutionalization is establishment of “development agencies” which were introduced by the State Planning Organization.

A series of meetings held in the region demonstrated that the sectoral executives are not optimistic on increasing the level of institutionalization and organization. As a response to this, one of DOKAP’s basic requirements for tourism is the elaboration of a “tourism partnership program” and the formation of a “tourism promotion council” to implement it. The two issues above do not overlap each other.

The region highly lacks organization. However, tourism is a sector which requires a high level of collaboration and organization.

It is obvious that solution is a new understanding and setup of regional management, which brings central and local administrations together and adds the civilian initiative to them. For this reason, it is considered that the Development Agency model is the only possibility for ensuring a sectoral ownership in the region.

4.1.1.2.2 Phased Scheduling of Investments (Policy 2.2)

On the other hand, another choice should be the accomplishment of tourism investments, particularly infrastructures in the Region in phases and in line with actual needs.

It should not be expected that the total potential of the Region can be mobilized simultaneously. Otherwise, such an attempt would result in misuse of limited resources, extending the programmed periods for the completion of investments and unproductively. On the other hand, low occupancies of and limited night stays in facilities existing today require that firstly the available capacity must be utilized more efficiently. Improvement of the current situation and making preparations for a more comprehensive development will be one of the most important strategic measures that must be considered in the short term (Appendix I: Short Term Improvement Measures and Appendix J: Middle and Long Term Measures).

⁴ An example to this is the tourism cooperative in the district of Safranbolu in Karabük. This cooperative is marketing the facilities and its main source of income is the share it gets from these facilities’ incomes for its marketing activities.

⁵ Such unions exist widely in the country. Examples to these is the South Antalya Tourism and Infrastructure Union (GATAB) in Antalya, Köyceğiz/Dalyan Union of Local Authorities for Environmental Protection in Muğla, Marmaris, Armutalan, and İçmeler Union of Local Authorities (MAR-İÇ BİR) in Muğla and Çeşme/Alaçatı Union of Local Authorities (ÇAL-BİR) in İzmir.

⁶ An example to this is the Usedom Union of Tourism in North of Germany. This union is active in PR, promotion and operation of thermal (baths) and beach facilities.

Through a selective approach, locations and tourism activities that have the highest potential for development and that show maximum positive spillover effects should be selected and initial development should start in these areas and activities.

4.1.1.2.3 Urging Private Sector Contribution to Investments (Policy: 2.3)

In the planned period, the public sector investments calculated as about 50 Million US\$ for infrastructured site development, new road construction and road construction that it must undertake particularly in inland plateaus and in valleys located south of the region and for the preparation of associated site management plans (Appendix H: Financial Aspect of Tourism Sector Development and Investment).

These investments must be accomplished with the cooperation of and contributions by private and public sectors. The sectoral organizations will have to contribute to initial installation expenses and operating costs.

Specifically for types of tourism that might develop in the rural sector, it is recommended to undertake infrastructure and superstructure investments in areas where demands concentrate, by observing sectoral developments closely, which are accomplishable with as less cost as possible in a short time. This recommendation is justified by the fact that the user's choice and demand are directed towards rather modest facilities in alternative tourism.

4.1.2 Development Strategies

The basic measures to formulate packages of detailed actions have been determined as a series of developmental strategies. These are shown below.

4.1.2.1 Publicity of East Black Sea Region (Strategy: 1)

- **Main Purpose:** To ensure that the Region is known at national and international levels, that certain symbols are remembered and that this image is in minds when organizing a travel program.
- **Actions to Be Taken:** All elements that symbolize the Region and are acceptable to all partners must be used for image creation.
- **Way of Doing? (How They Should be Done):**

The peculiar cultural and natural assets owned by the Region are highly convenient for image creation. For this, however, both traditional publicity methods and up-to-date publicity techniques available on electronic media must be used and campaigns must be organized.

- i. The Regional folklore should be used to create an image of the Region. The publicity of music and dances specific to the Region and of local musical instruments, local cuisine culture, local clothing, local jokes, etc particularly on electronic media, and the preparation and distribution of printed materials about them (books, leaflets, posters, etc) would be useful.
- ii. Another possibility would be the use of media (radio, TV, newspapers, periodicals, etc) for this purpose.
- iii. Yet another possibility for image creation would be the packaging of products specific to the Region (tea, hazelnuts, milk products, marine food principally including anchovy, textiles and weavings specific to the Region, etc) in a manner to represent Regional peculiarities. Thus, the image of the Region could be supplied to domestic and foreign markets.

- iv. A scientific documentation of the natural and cultural assets of the Region should be considered. Principally including old-aged forests in particular, rare assets must be introduced to the international public, including the academic community.
- v. Sportive successes and curiosity-rousing for the Region would yet be another possibility for publicity.
- vi. Festivals of the Region can be effective tools in promotion and marketing activities both in the domestic and foreign markets. The attractiveness of the natural resources as products increases through integration with such cultural events. Festivals are also an inseparable part of the plateau culture. These festivals and the messages they carry, such as peace, should be promoted first domestically and then internationally.

4.1.2.2 Satisfaction of Tourist Needs (Strategy: 2)

- **Main Purpose:** The basic purpose is to raise the Regional visitors' level of satisfaction. The tourist interviews made within the scope of this study indicate that recommendations by friends play a significant role in visiting the Region. For this reason, increased customer satisfaction agrees with the purpose of increased market share of the Region.
- **Actions to be Taken:** A significant portion of what must be done for increased customer satisfaction becomes apparent from the results of tourist interviews made under this study. Accordingly:
 - Ensure that adequate and accurate information can be easily obtained about the Region on different media both before and during travel.
 - Raise the quality of accommodation and eating/drinking facilities in urban and rural areas.
 - Improve the service supply quality of accommodation, eating/drinking and similar other facilities.
 - Raise urban and rural transportation systems and infrastructures to an adequate level and fulfillment of hygienic requirements.
 - Raise urban amenities and particularly cultural and sportive amenities to an adequate level.
 - Arrange pedestrian zones and shopping zones in urban settlements and enhance urban facilities.
- **Way of Doing? (How They Should be Done):**
 - i. It should be possible to receive information about the Region on different media. These are explained in relevant sections of the Report. Notwithstanding, Information Offices should be established within the Regional provincial Culture and Tourism Directorates and the existing ones should be assigned with increased functions; information desks should be provided at accommodation facilities; and other similar actions should be taken.
 - ii. Accommodation and eating/drinking facilities in urban and rural areas should be differentiated as to demand; individual historic structures should be made available to the tourism sector; the establishment of facilities of the boutique type of hotel should be encouraged.
 - iii. Service supply quality of facilities should be improved and local cuisine and peculiarities should be highlighted.
 - iv. A site arrangement should be provided for monuments that are historically precious; information boards should be provided in different languages; facilities for information on electronic media should be provided; necessary day visit amenities, including WC's should be installed.
 - v. Sign and guidance boards should be protected and the traffic system in urban areas should be maintained.

- vi. Urban areas of a different nature should be arranged and information should be provided to visitors on access to them; particularly local administrations and accommodation facilities should be urged to help visitors to have access to such areas.
- vii. Local administrations and tourism facilities should regularly announce to visitors any actual and planned cultural and sportive activities in their locality and, for this purpose, should publish periodical leaflets and similar other documents.

4.1.2.3 Cooperation with Tour Agents (Strategy: 3)

- **Main Purpose:** To improve cooperation with tour operators and strengthen solidarity among sector partners for purposes of attracting more visitors to the Region and increasing day stays and night stays.
- **Actions to be Taken:** The sector could increase its market share only with joint efforts of all stakeholders. Tour operators and travel agencies are the most important actors of marketing. In this context, other partners of the sector should be in close cooperation with international, national and regional operators. In order to accomplish this, the following actions should be taken:
 - i. Improve capacities of local agencies,
 - ii. Establish closer relations with international agencies; search for opportunities to enter foreign markets; participate at international fairs,
 - iii. Use e-tourism possibilities.
- **Way of Doing? (How They Should be Done):**

To accomplish the above, the following should be done.

i. Capacity Increasing of Local and Regional Tour Operators

Basic requirement is the need for the local and regional travel agencies to provide all services associated with tourism to the visitors from other areas. During the interviews with the local travel agencies and tour operators, it is observed that most of these organizations provide limited levels of service and are mostly operate as local agencies of travel agencies located in large urban centers.

Local and Regional travel agencies, above all, should be active in all areas regarding the sector (i.e. promotion, reservation, sales, organization, tour organization, transfers, incentives, etc.). Joint business and operations in cooperation with external agencies and operators can only commence after the realization of the recommendation given above.

The improvement of the institutionalization and the strengthening of the local travel agencies will result in the establishment of branch offices elsewhere and conducting the promotion, marketing, sales and tour operations by these travel agencies.

In view of the expected tourism activity at the international scale, such institutional developments will ensure the increase in the quality of services provided and international cooperation and partnerships.

ii. Joint Operations With International Operators

Inadequacies exist in the marketing efforts in foreign markets as well as for the domestic market. There is no immediate requirement inducing a large market domestically but new markets seem necessary in foreign countries. In this respect, a renewed framework is necessary for the operation of foreign and local tour operators and agencies.

One important opportunity for the marketing of Regional tourism products is cooperation with foreign operators and investors. Such an opportunity requires the necessary frameworks for foreign capital to invest in the Region. In such cases, international marketing will be conducted by the foreign partner. This opportunity can be utilized especially in urban areas located on the coast

iii. Close Cooperation with Environmental Initiatives for Eco-Tourism

The process of eco-tourism and public based eco-tourism becoming more and more attractive has resulted in the formation of specialized non-governmental organizations as well as specialized tour operators⁷.

Even though there are some initiatives and studies in eco-tourism and the environmental protection mainly by non-governmental organizations, Turkey lacks the necessary knowledge and skills for proper planning and implementation in eco-tourism. Especially, the promotional and marketing activities require the involvement of specialized internationally branded tour operators⁸.

It is necessary that this application to these organizations should also invite their experts to the Region. All kinds of detail should be presented to these experts during their visits to the Region. These experts will define the activities and studies to be conducted by the local actors. Strategy formulation for sensitive areas need to be formulated by these experts. The reason for this is the informed and selective approach of the customers of this market. High fees are paid for such tours and the international tour operators are highly trusted. All local actors, including local organizations should understand and undertake their respective roles.

4.1.2.4 Diversification of Tourism Products (Sub-policy 1.4)

The geography of the Region and its potential for tourism enable different axes or corridors for the development of tourism. These are differentiated on the basis of provinces. The existing administrative structure and therefore the statistical units being at the province level and the measurement of success being conducted at the provincial level necessitate the definition of the axes or corridors of development at the provincial level also. Thus, the objectives of reaching the targeted levels of overnight stays can be more easily measured at the provincial level.

This being so, some corridors, i.e. the coastal state highway present a coherence at the level of the Region.

On the other hand, the provinces within the Regions are recently termed as “NUTS2” regions in compliance with EU standards. These NUTS2 regions present a statistical region. For this reason, the recommendations at the level of the province should be viewed within this context also.

In general, the corridors of development are comprised of points of attraction and interest that are within one hour driving distance to the main transport axis

⁷ The primary organization in this respect is the France based Tour Operators Initiative, established by international tour operators and supported by United nations Environment Program (UNEP) and United Nations Education, Science and Culture Organization (UNESCO) and World Tourism Organization (WTO). Similarly, World Wildlife Fund (WWF) is active in the research into scarce natural resources and protecting them through appropriate utilization. These organizations also provide financial support where necessary and appropriate.

⁸ Tour Operators Initiative or members of this organization such as UK based “Discovery Initiative” is an example.

4.1.2.4.1 Coastal Corridor 1

Coastal section of the province of Ordu, The 95 km. long linear section between provincial borders of Samsun and Giresun.

Settlements on the Corridor: The important settlements on this corridor are Ünye, Fatsa, Perşembe, Ordu (Central district) and Gülyalı.

Characteristics With Respect to Tourism: Potentials for coastal tourism (beaches, fishermen's wharfs, urban tourism), cultural tourism (urban fabrics, museums, individual monuments and buildings) are the outstanding characteristics.

Basic Tourism Products and Special Days: Basic products that can be marketed are the beaches, yacht tourism, culture tourism (museums, urban fabrics, individual monuments and buildings), festivals (i.e special days for Fatsa Çınar Festival in July and Ünye Culture and Tourism Festival on July 19-21).

Tourism Resources and Location: The coastal areas of Ünye, Fatsa, Perşembe and Gülyalı are the most favorable locations for coastal (i.e sea) tourism within the whole Region. There are natural cliffs on the section between Perşembe and Bolaman.



Çaka Beach – Perşembe

Source: Ordu Provincial Directorate of Culture and Tourism

The districts of Ünye and Fatsa are the entrance points to Eastern Black Sea Region from the west. The hills next to the coastal areas have a wide range of vista points. This axis relatively has quality facilities and boutique hotels. Furthermore, on the axis or in close vicinity are located natural and cultural assets that are subject to daily visits. These are namely; in Ünye, Castle of Ünye, Çamlı, Çakırtepe, Rock Tombs of Gürpınar, İnönü Cave, Women's Uphill Urban Conservation Area;

in Fatsa, Castle of Fatsa, Lake Gaga, Sarmaşık Baths, Castle of Bolaman; in Perşembe, Cape of Yason and Church of Yason, Castle of Hoyrat, in Ordu Central District, Boztepe, Castle of Bozukkale, Pşaoğlu Mansion, Rock Tombs of Delikaya, plateau settlements of Kurul, Eski Pazar Mosque, Old Prison and Turnasuyu.



Ordu City Center

Source: Ordu Provincial Directorate of Culture and Tourism

Recommendations for the Development of the Corridor: Accommodation facilities should be developed in line with boutique hotel principles by giving emphasis to the urban fabric and local architecture within the coastal settlements. It is recommended that new large scale facilities shall be located nearby the settlements and not within the existing fabric of the center.

Ordu city center requires shopping and pedestrianized districts. Pedestrianized districts are also recommended for the city centers of Perşembe, Ünye and Fatsa. The historical seaside house in Bolaman needs to be completed as soon as possible. Also, the theme park planned to be built in the city center of Ordu should be built.

The existing daily facility at Çamlık in Ünye needs to be re-organized. All of the settlements on the coast should have information offices for the tourists and direction signs are needed. Around the Lake Gaga in Fatsa, picnic and camping sites are to be realized in an organized way. It is recommended that the port of Fatsa and Yalıköy fishermen's wharf should be transformed into a yachts' anchoring and maintenance area. The beaches of Ünye, Fatsa, Ordu, Gülyalı and also the beaches of Caka, Çeşmeönü, Belicesu, Efirli, Yason Burnu in Perşembe should be equipped with adequate facilities such as cabins, WC, parking areas, food and beverage facilities, etc.

4.1.2.4.2 Ordu South Corridor 1:

The 120 kms. strip that is between the coastal section that extends from the city center of Ordu towards north and south and the border of Sivas province.

Settlements on the Corridor: Ordu (central district), Kabadüz and Mesudiye are the main settlements along the corridor.

Characteristics With Respect to Tourism: The main attractions in the area are nature, plateaus, camping opportunities, trekking photo safari, nature sports and other alternative tourism opportunities

Basic Tourism Products and Special Days: The potentials that are subject to tourism development are the rich vegetation, natural structure, rivers, lakes, traditional plateau culture And plateau houses, culture tourism (churches, castles, historical settlements, rock tombs and festivals (special days). The main festivals are Culture and Arts Festival of

Yeşilce – 6-12 July, Festival of VW (Wosvos) on two weeks in July, Plateau festivals of Topçam area – July 18 and Plateau festivals of Çambaşı area – 13-14 July.

Tourism Resources and Location: The area that covers Ordu, Kabadüz and Mesudiye is very rich in terms of natural and cultural assets. Within the axis that extends along Melet River and Turnasuyu Stream there are plateau groups of which three are declared as Tourism Area. The prevailing characteristic of this axis in terms of tourism potential is plateau tourism.



Çambaşı Plateau

Source: Ordu Provincial Directorate of Culture and Tourism

Çambaşı Plateau, a Tourism Center, is located in the south of district of Kabadüz bordering the district of Mesudiye. An asphalt road exists between Ordu city center and the plateau. The service areas and the infrastructure of the plateau is relatively developed and the development plans and typical house designs are prepared. There are commercial facilities but there are no organized and structured accommodation facilities.



Çurukalan Plateau

Source: Ordu Provincial Directorate of Culture and Tourism

Yeşilce-Topçam Plateaus Tourism Center and Keyfalan Plateau Tourism Center in the district of Mesudiye carry an important potential in terms of tourism development. These plateaus offer opportunities for a wide range of nature sports activities (trekking, camping, photo safaris, etc.) and there are areas suitable for extreme sports (rafting on Melet River and Turnasuyu Stream, jeep safari, and gliding). The natural and cultural assets for daily visits are Eriçok Hill, Çukuralan Plateau, Meletios Castle, Kaleköy Castle and tombs, the antiquity settlement of Arıkmusa and the historical houses and mansions in the city center of Mesudiye.

Recommendations for the Development of the Corridor: The development of an efficient transport system along the corridor carries a priority. The corridor needs to be accessed easily.

Priority should also be given to the completion of the planning studies building codes for the plateaus that are declared as tourism centers. The plateaus should be handled with a management plan concept, illegal construction should be prohibited and endemic traditional architecture should be preserved. A system of boarding houses should be developed by the utilization of plateau houses under an organization such as cooperatives or associations.

Infrastructure of Çambaşı should be completed as soon as possible. The road between Çambaşı and Ordu should be maintained properly. The stabilized (10 km.) and rough village road (16 km.) between Çambaşı and Yeşilce should be paved with asphalt.

The road between Mesudiye and Yeşilce also requires maintenance. The 7 km. strip of the 21km. road between Mesudiye and Keyfalan should be paved with asphalt. The social amenities in tourism centers should be completed (parking areas, WC, daily facilities and direction and information signs. The corridor has to be promoted and marketed by giving emphasis to its potentials in eco and alternative tourism.

4.1.2.4.3 Ordu South Corridor 2

The linear 105 km. area that extends from north-west to south-east between the district centers of Fatsa and Mesudiye.

Settlements on the Corridor: Fatsa, Çamaş, Gürgentepe, Gököy, Mesudiye district centers are the main settlements on the corridor.

Characteristics With Respect to Tourism: Opportunities for nature, camping, trekking, photo safari, daily visits to natural and cultural assets are the main characteristics.

Basic Tourism Products and Special Days: The basic tourism products are the rich vegetation of the inner sections of Ordu province, the natural and historical-cultural assets along the corridor and the transition in the south to plateaus. Special days are the festivals of Gürgentepe Hidrellez – 4-6 May, Gököy – May 20, Fatsa-Çınar – July, Çamaş, Gelinkaya 1-31 July.

Tourism Resources and Location: The settlements on the road that extends south from Fatsa offer opportunities for trekking, photo safaris and floral interests. Also, some special points on the corridor have tourism opportunities as well. Gaga Lake in Fatsa, rock tombs in Gürgentepe, the Sayacabaşı Forest on the border between Gürgentepe and Ulubey, Gököy Castle, Çermik Lake, Ulugöl, Selemen Plateau, Aydoğan Plateau, and Aydoğan Peak are these points of interest. Aydoğan hill and peak is suitable for vista point, gliding and trekking activities. It is possible to reach Aybastı-Perşembe Plateaus Tourism Center and Yeşilce-Topçam Plateaus Tourism Center from Gököy.

Recommendations for the Development of the Corridor The priority on Fatsa – Mesudiye axis is the improving the quality of the road. At points of interest (i.e. Aydoğantepe, Ulugöl, etc.) daily and accommodation facilities are recommended.

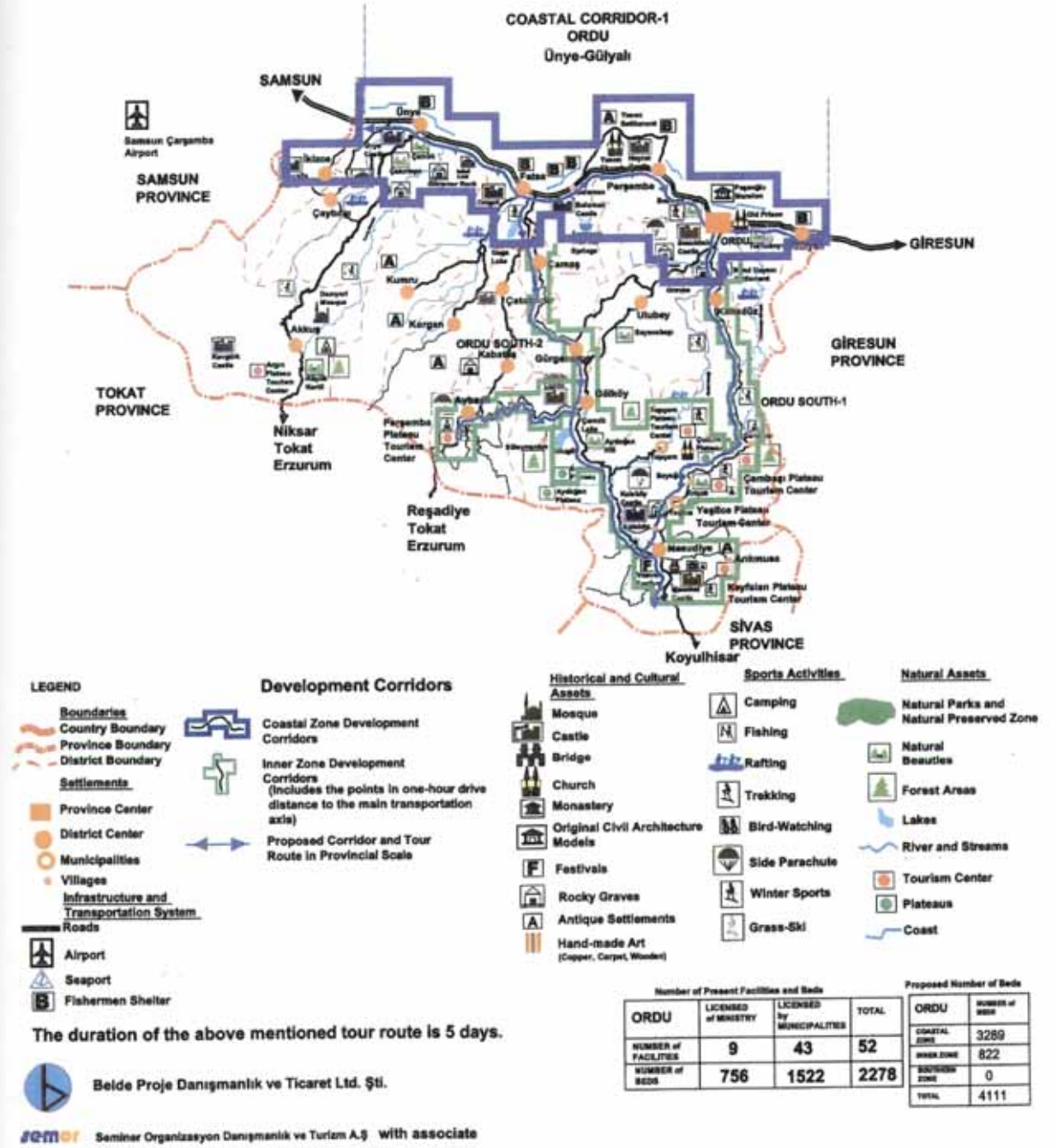
The road between Gököy-Aybastı-Perşembe should be improved and maintained (especially 18km. between Aybastı and The cadastral and planning studies for Perşembe Plateau Tourism Center should be completed. The existing traditional plateau houses should be encouraged to be utilized as boarding houses. Necessary infrastructure for nature and extreme sports and social amenities should be provided.

This corridor as stated above should be regarded as complementary to Ordu South Corridor 1 especially in long term tour programs.

Necessary infrastructure and social amenities are also required for Selemen Plateau and Aydođan Plateau located on the southern portion of the corridor in order to utilize the potentials for camping, trekking and floral interests.

EASTERN BLACK SEA REGION TOURISM DEVELOPMENT STUDY

MAP 1: TOURISM DEVELOPMENT CORRIDORS



4.1.2.4.4 Coastal Corridor 2

The coastal section of Giresun province, the 100 km. linear section between the borders of Ordu and Trabzon provinces.

Settlements on the Corridor: The district centers of Piraziz, Bulancak, Giresun (central district), Keşap, Espiye, Tirebolu, Görele, Eynesil are the main settlements on the corridor.

Characteristics With Respect to Tourism: The main potentials are in coastal tourism opportunities (beaches, fishermen's wharfs, urban tourism), culture tourism (urban fabrics, museums, individual monuments and buildings).

Basic Tourism Products and Special Days: Basic tourism products are the beaches, opportunities for yacht tourism, exit gates for tours to inner sections, culture tourism, and festivals. The special days (i.e festivals) are International Black Sea Aksu Festival 20-23 May and Tirebolu Hazelnut Festival on the last day of August or last day of the first week of September.

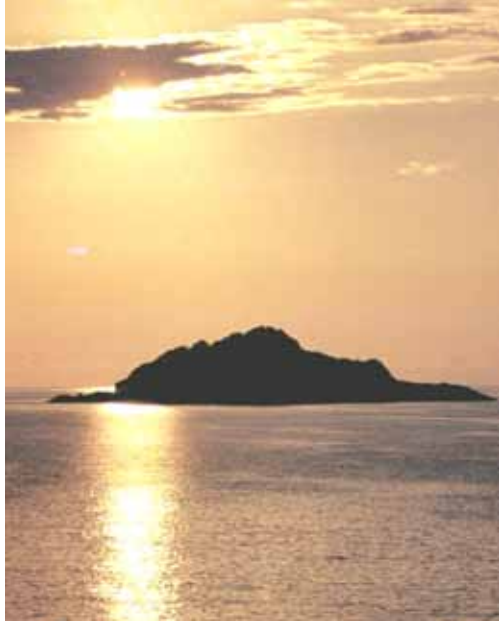
Resources for Tourism and Location: The coastal section of Giresun attracts attention with its panoramic views and relatively well preserved historical urban fabric.



Giresun City Center

Source: Giresun Provincial Directorate of Culture and Tourism

The cultural assets that have emerged during different periods of history and that have integrated with the natural landscape are important. There are relatively quality accommodation facilities on the corridor. There are natural and cultural assets that can be subject to daily visits such as Beyler Mansion in Piraziz, Çarşı Mosque in Bulancak, Kuşluhan Çastle, Acısu Rock Church, in Giresun city center Castle of Giresun, Giresun Island, Aksu River, Urban Conservation Zone in Zeytinlik neighborhood, Museum of Giresun, Gedikkaya Cave in Keşap, Andoz Castle in Espiye, Bedrama Castle in Tirebolu, Central Castle, Yılğın Beach and Eynesil Castle in Eynesil.



Giresun Island

Source: Ministry of Culture and Tourism and Giresun Provincial Directorate of Culture and Tourism



Yılgin Beach – Espiye

Recommendations for the Development of the Corridor: The traditional fabric along the coast should be preserved, especially Zeytinlik neighborhood in Giresun. The buildings that have historical characteristics can be transformed into boutique hotels. It is recommended that new facilities shall be located nearby the settlements and not within the existing fabric of the center.

Giresun Castle and Giresun Island should be reorganized and night time lighting provided in accordance with the decisions of the Conservation Council.

Pedestrianized and shopping districts are recommended in the urban centers along the coast. Yachts' anchoring areas are recommended for Giresun and Tirebolu centers

The beaches of Tirebolu-Yılgin should be equipped with adequate facilities such as cabins, WC, parking areas, food and beverage facilities, etc.

Tourism information bureaus in the centers along the coast should be established and direction and information signs should be posted.

4.1.2.4.5 Giresun South Corridor

The 75km. long corridor that extends from Giresun city center towards the boundary between Dereli and Şebinkarahisar on the south.

Settlements on the Corridor: Giresun city center and Dereli district center are the main settlements on the corridor.

Characteristics With Respect to Tourism: The plateaus and alternative tourism opportunities are the main characteristics of the corridor.

Basic Tourism Products and Special Days: The three plateaus which are Tourism Centers and the surrounding groups of plateaus within the boundaries of the district of Dereli are rich in terms of natural and cultural assets. Special days as festivals are Dereli Kümbet Festival – 3rd week of July and Dereli-Bektaş Festival – Last week of July.

Resources for Tourism and Location: The basic tourism potential of the corridor comes from the plateaus.

There are many plateaus on the corridor three of which are designated and declared as Tourism Centers. Kümbet Plateau Tourism Center is located south of Dereli district center and with 58 km. distance to Giresun city center. There are partially completed infrastructure and social amenities. There exists also a “holiday village” (Koçkayası Plateau Houses) realized by the Governorate of Giresun. This group of plateaus has the highest potential in terms of tourism development in Giresun.



Kümbet Plateau

Source: Giresun Directorate of Provincial Special Administration



Bektaş Plateau

Source: Giresun Directorate of Provincial Special Administration

Bektaş Plateau, on the other hand is located west of the district of Dereli on the border of Dereli and Bulancak. Its primary characteristic is the unspoiled plateau houses, flora and suitability for nature sports. Infrastructure and service facilities in this plateau is also partially completed. There is a two-star hotel with 80 bed capacity. The plateau is suitable for grass skiing in summer as well as winter skiing. Kulakkaya Plateau complements Bektaş Plateau. Its endemic flora and plateau houses are important potentials.

Other plateaus that present opportunities are Yavuz Kemal Plateau, Melikli Obası Plateau, Tamdere Plateau, Kurttepe Plateau, etc. For daily visits the main points of interest are Kuşdoğan Castle, Pınarlar Waterfall, Aymaç point, Monastery of Virgin Mary and Kırkharman Church.

Recommendations for the Development of the Corridor: The development of this corridor will be primarily based on the plateaus. Thus, the planning studies for the three plateaus (Tourism Centers) should be completed as soon as possible to appropriately control the pace of building and development. The plateaus should be handled with a

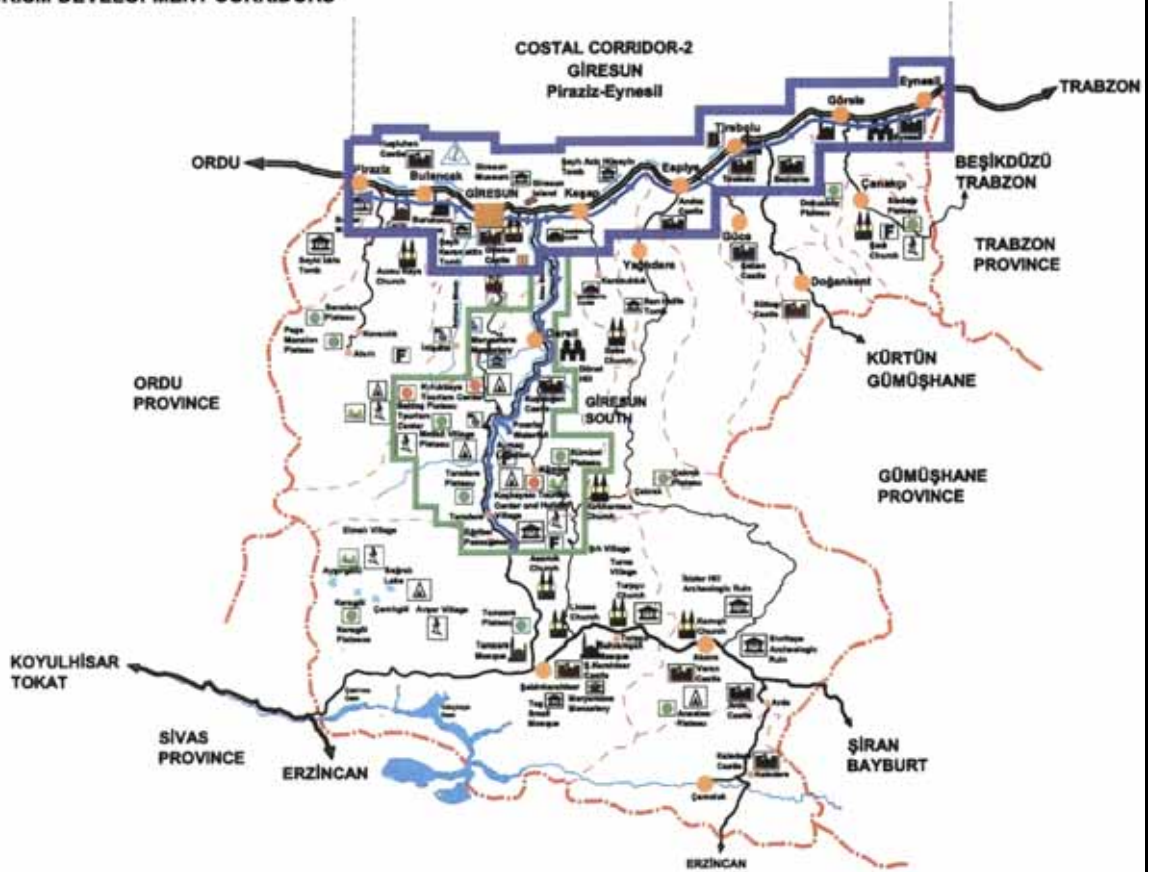
management plan concept, illegal construction should be prohibited and endemic traditional architecture should be preserved. A system of boarding houses should be developed by the utilization of plateau houses under an organization such as cooperatives or associations.

The 26 km. road between Dereli and Kümbet needs continuous maintenance. The measures are required for waste water discharge and solid waste removal. The social amenities should be completed and necessary signs for direction and information shall be posted. A mechanical facility (i.e lift) is recommended between Göktepe and Kızakkertli Hills reaching an altitude of 2450 meters (1st phase). The 2nd phase should include a lift from Göktepe plateau to Göktepe Hill at an altitude of 2463 meters.

The 22km. road between Bektaş Plateau and Giresun city center and 78 km. road between Kulakkaya Plateau and Giresun city center need to be paved with asphalt. Similarly, 27 km. road between Bektaş Plateau and Bulancak requires paving with asphalt also. Connection between Kulakkaya and Dereli should be established. The route between Bektaş-Kulakkaya-Yavuzkema1 and Melikli Obası plateaus shall be organized as nature sports route. Mechanical lift facilities are recommended between the gathering point (arena – at 1850 meters altitude) on Bektaş Plateau, Yörücek Hill (2300 meters), Göllerönü Hill (2150 meters) and Kiran Hill (2072 meters). These will enable plateaus to be included in various winter tourism types besides easing immensely their accessibility.

An effective and secure transport system between the plateau groups and the tourism centers is a must and these shall be equipped with adequate resting areas and signs for direction and information.

EASTERN BLACK SEA REGION TOURISM DEVELOPMENT STUDY
MAP 2: TOURISM DEVELOPMENT CORRIDORS



LEGEND

- Boundaries**
 - Country Boundary
 - Province Boundary
 - District Boundary
- Settlements**
 - Province Center
 - District Center
 - Municipalities
 - Villages
- Infrastructure and Transportation System**
 - Roads
 - Airport
 - Seaport
 - Fishermen Shelter

Development Corridors

- Coastal Zone Development Corridors
- Inner Zone Development Corridors
(Includes the points in one-hour drive distance to the main transportation axis)
- Proposed Corridor and Tour Route in Provincial Scale

Historical and Cultural Assets

- Mosque
- Castle
- Bridge
- Church
- Monastery
- Original Civil Architecture Models
- Festivals
- Rocky Graves
- Antique Settlements
- Hand-made Art (Copper, Carpet, Woodcar)

Sports Activities

- Camping
- Fishing
- Rafting
- Trekking
- Bird-Watching
- Side Parachute
- Winter Sports
- Grass-Ski

Natural Assets

- Natural Parks and Natural Preserved Zone
- Natural Beauties
- Forest Areas
- Lakes
- River and Streams
- Tourism Center
- Plateaus
- Coast

The duration of the above mentioned tour route is 4 days.



Belde Proje Danışmanlık ve Ticaret Ltd. Şti.



Seminer Organizasyon Danışmanlık ve Turizm A.Ş. with associate

| Number of Present Facilities and Beds | | | Proposed Number of Beds | |
|---------------------------------------|------------------------|------------------------------|-------------------------|----------------|
| GİRESUN | LEGISLATED BY DISTRICT | LEGISLATED BY MUNICIPALITIES | GİRESUN | NUMBER OF BEDS |
| NUMBER OF FACILITIES | 11 | 11 | 3054 | |
| NUMBER OF BEDS | 707 | 357 | 764 | |
| | | | 0 | |
| | | | TOTAL | 3818 |

4.1.2.4.6 Coastal Corridor 3

125 km. long section that includes the coastal areas of Trabzon and the area between the borders of Giresun and Rize provinces.

Settlements on the Corridor: District centers of Beşikdüzü, Vakfıkebir, Çarşıbaşı, Akçaabat, Trabzon (central district), Yorma, Arsin, Araklı, Sürmene, Of are the main settlements on the corridor.

Characteristics With Respect to Tourism: Opportunities for coastal sea tourism (beaches, wishermens' wharfs, urban tourism and the entrance point to the Region), cultural tourism (urban fabrics, museums, monuments and buildings) are the main characteristics of the corridor. The tour programs within the Region also usually start and/or culminate in this area.

Basic Tourism Products and Special Days: Beaches, yacht tourism potentials, entrance points to inner sections, points of gathering and dispersal for tours, location of quality and large scale accommodation facilities, culture tourism products (i.e. museums, historical urban fabric, monuments) and festivals as special days are the main tourism products. Festivals include The Sea Festivals of Akçaabat Aladurbiye on July 6, and Sürmenen Culture and Tourism Festival on August 1-2-3.

Resources for Tourism and Location: In terms of internal dynamics, Trabzon coastal area comprises the most developed section of the Region. Trabzon, the largest city of the Region is located on this corridor. The only airport of the Region, the port open to international freight and passenger transport and the starting point of the main road that connects the Region to south enable the development and diversification of commercial and tourism activities within the coastal area of Trabzon. Trabzon is the point of departure and end for may tours within the Region.



Ayasofya Church

Source: www.trabzon.gov.tr

The hills immediately to the south of the coastal area have extraordinary vista points. As stated above, due mainly to the relatively well developed transport opportunities; Trabzon has the highest quality accommodation facilities within the Region.



Trabzon Coasts

Source: Trabzon Directorate of Provincial Special Administration

The main points of interest for daily visits are: Natural sand - beaches in the district of Çarşıbaşı, traditional settlement fabric in Akçaabat, Lake Sera, in the central district of Trabzon, Church of Haghia Sophia, Atatürk Mansion, The Arsenal, Castle of Trabzon, Castle Park, Boztepe, Central Neighborhood, Church of Little Ayvasıl, Kuştul Monastery, Kızlar Monastery, İskenderpasha Mosque, Big İmaret Mosque, Vakıfha, Taşhan, Fatih Baths, etc. and in Sürmene, Memişoğlu Mansion, Çamburnu and Blue Flag Beach.

Recommendations for the Development of the Corridor: The corridor is the most important area in terms of tourism development within the Region. Due to this character, it is required that the transportation systems and necessary infrastructure should be developed accordingly as well as modernization of the airport and the port facilities and redevelopment of part of the port area and wishermens' wharf as yacht anchoring and maintenance areas.

The settlements along the coast and especially Trabzon city center and Akçaabat should have pedestrianized and shopping districts. New saloons for theatre performances, art galleries and other multi-purpose meeting rooms should be developed in and around Trabzon. Also, open green areas within the urban areas should be increased.

In Trabzon the traditional urban fabric, especially the Central Neighborhood and individual monuments should be subject to tourism activities in line with the decisions of the Conservation Council.

New large capacity accommodation facilities should be located outside the existing urban area with consideration given to rural settlement structures and architecture. The existing facilities should be improved.

Information and direction signs should be posted and monuments should be illuminated at night times.

4.1.2.4.7 Trabzon South 1 – Gümüşhane Corridor

The section that extends along the main highway from Trabzon to Gümüşhane on the south and to the provincial border of Bayburt.

Settlements on the Corridor: Trabzon city center, Maçka, Kürtün, Torul and Gümüşhane city center are the main settlements on the corridor that extends 170 kms. from north to south.

Characteristics With Respect to Tourism: Alternative tourism products, natural and cultural assets are integrated along the corridor. Historical settlements and monuments exists on the corridor also. Nearly all tours visits the portion of this corridor that lies within the boundaries of the province of Trabzon.

Basic Tourism Products and Special Days: The internal dynamics with respect to the diversification of alternative tourism products is high on the corridor. Activities such as plateau tourism, camping, trekking, winter sports, cave visits, flora inspection and visits to historical places are possible along the corridor that is intensively used by domestic and foreign tours. This corridor, as stated, is the most promising high potential area for tourism development.

Resources for Tourism and Location:



Sümela Monastery

Source: www.trabzon.gov.tr

Maçka-Şolma Tourism Center and the plateau groups around it have an important tourism potential with their unspoiled natural habitats, rich flora and traditional houses. Sümela Monastery and Altındere National Park are the most nationally and internationally well known tourism products within the whole Region. Altındere National Park with its forests, its stream that flows through the valley and Sümela Monastery located on the hills is the most attractive point of interest. The monastery is a natural part of the landscape.

Zigana Holiday Village within the borders of the district of Maçka is another potential to be utilized with its traditional style of architecture and its level of services. Hamsiköy settlement within the borders of Maçka is another point of interest with its traditional dishes and traditional way of life. Zigana Tourism Center on the highest altitudes between Trabzon and Gümüşhane and next to the famous Zigana Pass is the only existing winter sports center in the Region. It has potential to be further developed with accommodation and service facilities.



Zigana Holiday Village

Source: www.trabzonturizm.gov.tr

The famous Spider Forests within the borders of the district of Kürtün in the province of Gümüşhane is a very important world wide natural asset that should be handled with preserving by utilization approach; i.e the balance between “use” and “preservation” should be established. Karaca Cave is another natural beauty in Gümüşhane with is natural wonders. The other natural and cultural assets that can be subject for daily visits are as follows: in Maçka district; Maura Plateau, Kiraz Plateau, Monastery of Vazelon, in Kürtün district; Erikbeli Tourism Center, Kadirga Plateau, in Torul; Torul Castle, Ardeşa Castle, in Gümüşhane central district; İmera Monastery, Old City, Süleymaniye Mosque, Sarıççek Village Rooms and, Ruins of Santa.

Recommendations for the Development of the Corridor: Long Term Development Plan for Altındere Valley National Park that also includes Sümela Monastery should be finalized and physical developments should be under the control and supervision of this Plan. An

Area Management Plan for the National Park should also be prepared and information and direction signs should be posted accordingly. The different building rights for different preservation zones should be remedied. Only daily facilities should be allowed within the Park. Accommodation facilities should be directed to Maçka and its environs. Routes for trekking should be established within the Park.

The master and detailed planning studies for Maçka Şolma Tourism Center should be finalized and construction activities should be put under control also. New construction should be in the form of traditional plateau houses. The Center should also be handled with an Area management Plan. The 22 kms. of dirt road between the plateau and Maçka center should be improved with hard paving. The village road to the plateaus of the district of Düzköy should also be improved. There should be trekking routes and camping sites between the plateau groups. Information and direction signs are also needed.

Infrastructural services for Zigana Tourism Center shall be completed. Opportunities should be sought for market the Center together with other points of attraction in the surrounding area and in the corridor. This ski center can also be promoted and marketed together with other ski centers in the nearby provinces, i.e Kop Mountain, Palandöken and Sakaltutan centers.

The Spider Forest in the province of Gümüşhane offers unique opportunities for botanical sciences and flora investigations. This area should be approached with these concerns and daily facilities can be developed in the vicinity of the forest.

Gümüşhane city center serves as a accommodation center for natural and cultural tourism the province Gümüşhane. There is a need for improving the infrastructural and social services in the city. The existing historical buildings should be preserved and some of the old buildings should be converted for tourism use. Old City of Gümüşhane is by itself an open museum. It should be organized with this principle.

4.1.2.4.8 Trabzon South Corridor 2

The road and the environs that extends 50 kms north to south between Akçaabat and Düzköy comprises this axis.

Settlements on the Corridor: Akçaabat and Düzköy district centers are the important settlements on the corridor.

Characteristics With Respect to Tourism: The natural assets and traditional way of life emerge as the main aspects of alternative tourism opportunities. There is richness in natural assets and plateaus and these are the main tourism characteristics.

Basic Tourism Products and Special Days: This area's main attraction is the festivals on the plateaus. On the other hand, during the recent years public investments attempt to attract tourism to the corridor. The main festivals are as follows: Düzköy-Hırsafa-Karadağ Festival on the first weekend of July; Akçaabat-Hıdırnebi Festival on July 20; Düzköy Kamana Plateau Festival on first Sunday in August; Düzköy Honefter Festival between August 25 and Sept 1; Düzköy Serda Festival on the first week of September.

Resources for Tourism and Location: The plateaus together with their natural beauties and endemic culture are the main candidates as products for alternative tourism. There are many groups of plateaus on the corridor with one of them being a Tourism Center (Karadağ Plateau Tourism Center). The other main groups are Kuruçam, Hıdırnebi, Honefter, Hakça Obası, Kayabaşı and Hırsafa. Çalköy cave in the district of Düzköy is an important natural structure. The Governorate of Trabzon has attempted to initiate tourism activities on this corridor by investing in Hıdırnebi Plateau Yaylakent (Plateau-city) Project and Kayabaşı

Plateau Yaylakent Project. These projects that have utilized the concept of traditional plateau architecture and that have sufficient infrastructural and social services are marketable products.

Recommendations for the Development of the Corridor: Priority should be given to the finalization of the Development Plan being prepared for Karadağ Plateau Tourism Center. This will hinder illegal and unplanned construction and will direct construction with the concept of traditional architecture. The plateau houses can be utilized as boarding houses. For such a development, associations or cooperatives can be established. The local population should be trained in tourism and efforts in this direction should be supported.

The 13 km. section of 40kms. road between Akçaabat and Karadağ Plateau should be paved. The 16 kms. road between Akçaabat-Hıdırnebi and Kuruçam plateau should also be paved. The infrastructure and social amenities in the plateaus should be completed.

In order to preserve the endemic culture and natural landscape the plateaus should be managed properly with an Area Management Plan. Routes for trekking and other nature sports and appropriate signs are required.

4.1.2.4.9 Trabzon South Corridor 3

The 60 km. long axis that extends south from the district center of Of to Çaykara district center and ends in Uzungöl.

Settlements on the Corridor: Of, Dernekpazarı, Çaykara district centers and well known Uzungöl are the main settlements on the corridor.

Characteristics With Respect to Tourism: The corridor presents a wide range of alternative tourism opportunities. The plateaus and the settlements are integrated with natural landscapes and this emerges as the main characteristic.

Basic Tourism Products and Special Days: Most of the tours visiting the Region include this corridor in their itinerary. There are important products of tourism on the corridor and the main one is the Uzungöl Natural Park with its attractive scenery, lake, forest, developed facilities and opportunities for nature sports. The corridor also has local and international festivals. These are; Çaykara Kuşmer Plateau Festival on July third Sunday of July; Uzungöl Culture and Tourism Festival on first Sunday of August and Çaykara Yayla Ortası Festival.

Resources for Tourism and Location:



Uzungöl

Source: Ministry of Culture and Tourism, General Directorate of Information

Uzungöl, with its natural breathtaking landscapes, its lake and its traditional architecture is well known destination both at the national and international levels. The area is under the status of a Natural Park.

Sultan Murat Plateau located on the western border of the district of Çaykara is also an attraction point with its historical character and natural landscape. Local population utilize the area and accommodation facilities intensively but the occupancies are well below its capacity. Another attraction is the rich flora along the corridor extending north to south. Of district center is the starting or interim point for most tours on the corridor. Çaykara and Dernekpazarı offer examples of traditional way of life and facilities for stopovers.



Sultan Murat Plateau

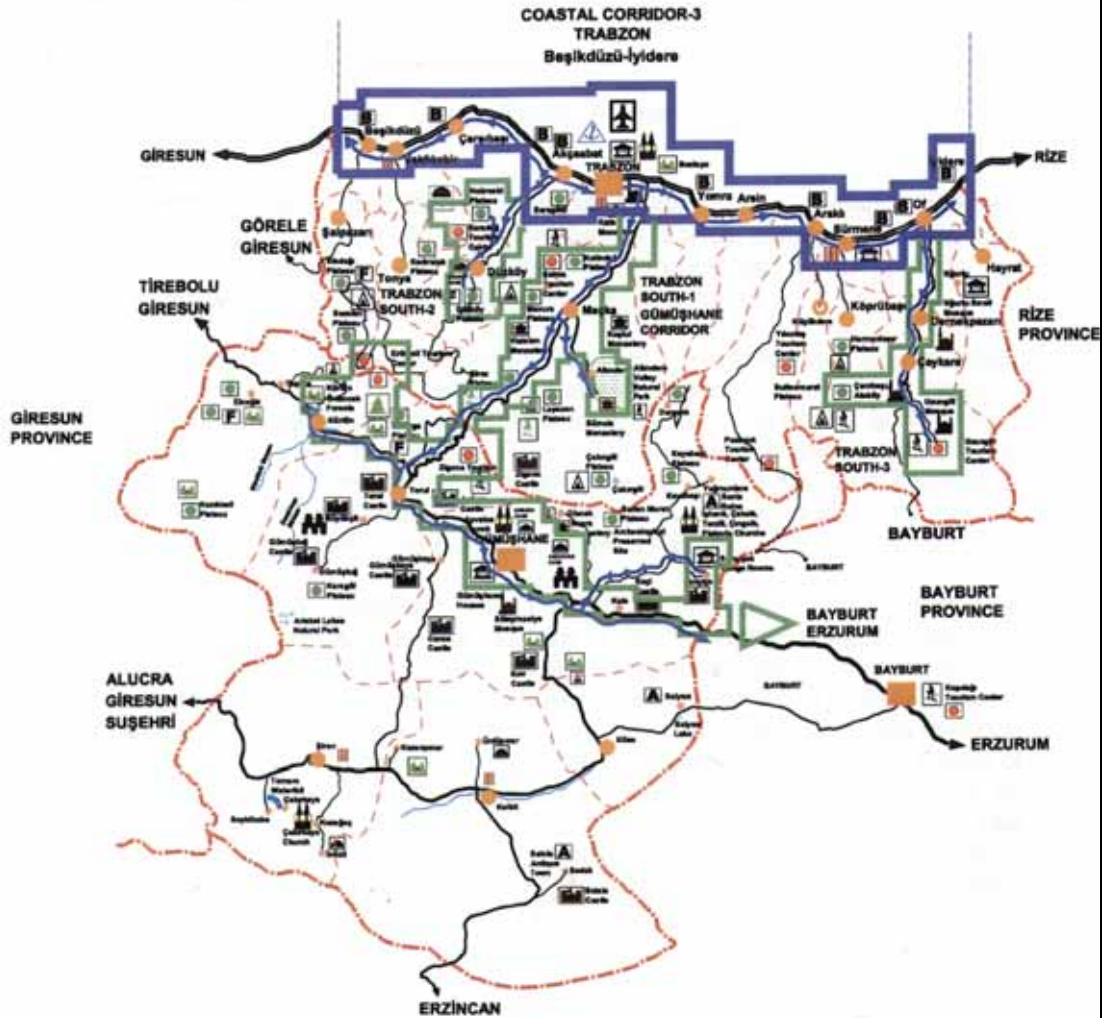
Source: www.trabzonturizm.gov.tr

Recommendations for the Development of the Corridor: Uzungöl Natural Park and the Lake itself is under threat due to unplanned extensive use. The area has the statues of Tourism Center and Natural Conservation Area as well as the statue of Natural Park. An Area Management Plan is required and the existing development Plan should be revised according to this Management Plan. It is a must that “ugly” construction that does not comply with local traditional architecture should be stopped. In order to preserve the lake and end the threat from pollution and silt from run-off water, drainage and wastewater collection and discharge facilities should be improved. Solid waste disposal is another problem. An efficient method for solid waste disposal should be introduced. The existing settlements on the north and east are recommended to be preserved and utilized for tourism as boarding houses. Route and information signs should be posted. The operators of the facilities should come together through a cooperative or an association in order for proper implementation of the Management Plan and for joint promotion and marketing.

A similar approach is also required for Sultan Murat Plateau. Existing Development Plan should be revised in accordance with the provisions of An Area Management Plan. 17 kms. of road between Çaykara and the plateau should be improved and paved. Plateau houses should be supported for boarding house uses. Trekking routes and camping sites, as with the other plateaus, should be established with appropriate information and direction signs.

Information offices should be established along the corridor as well as daily facilities and accommodation units. District centers should have improved infrastructure and social amenities. Connections between the settlements and points of attraction shall be improved and the settlements shall reflect their traditional character.

EASTERN BLACK SEA REGION TOURISM DEVELOPMENT STUDY
MAP 3: TOURISM DEVELOPMENT CORRIDORS



LEGEND

- Boundaries:** Country Boundary, Province Boundary, District Boundary
- Settlements:** Province Center, District Center, Municipalities, Villages
- Infrastructure and Transportation System:** Roads, Airport, Seaport, Fisherman Shelter
- Development Corridors:** Coastal Zone Development Corridors, Inner Zone Development Corridors (includes the points in one-hour drive distance to the main transportation axis), Proposed Corridor and Tour Route in Provincial Scale
- Historical and Cultural Assets:** Mosque, Castle, Bridge, Church, Monastery, Original Civil Architecture Models, Festivals, Rocky Graves, Antique Settlements, Hand-made Art (Copper, Carpet, Woolen)
- Sports Activities:** Camping, Fishing, Rafting, Trekking, Bird-Watching, Side Parachute, Winter Sports, Grass-Ski
- Natural Assets:** Natural Parks and Natural Preserved Zone, Natural Beauties, Forest Area, Lakes, River and Streams, Tourism Center, Plateaus, Coast

The duration of the above mentioned tour route is 5 days.

Belde Proje Danışmanlık ve Ticaret Ltd. Şti.

Seminer Organizasyon Danışmanlık ve Turizm A.Ş. with associate

| TRABZON | | | | GÜMÜŞHANE | | | | BAYBURT | | | |
|--------------------------------|-------|-----------|-------|-----------|-------|-----------|-------|-----------|-------|-----------|-------|
| NUMBER OF | UNITS | NUMBER OF | UNITS | NUMBER OF | UNITS | NUMBER OF | UNITS | NUMBER OF | UNITS | NUMBER OF | UNITS |
| Historical and Cultural Assets | 22 | 138 | 188 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Sports Activities | 2285 | 5015 | 7010 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Natural Assets | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |

| TRABZON | | | | GÜMÜŞHANE | | | | BAYBURT | | | |
|--------------------------------|-------|-----------|-------|-----------|-------|-----------|-------|-----------|-------|-----------|-------|
| NUMBER OF | UNITS | NUMBER OF | UNITS | NUMBER OF | UNITS | NUMBER OF | UNITS | NUMBER OF | UNITS | NUMBER OF | UNITS |
| Historical and Cultural Assets | 2 | 8 | 10 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Sports Activities | 68 | 257 | 345 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Natural Assets | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |

4.1.2.4.10 Coastal Corridor 4

The coastal section of Rize province; the 100 km linear section between Trabzon and Artvin provincial borders.

Settlements on the Corridor:

İyidere, Derepaşarı, Rize (city center), Çayeli, Pazar, Ardeşen and Fındıklı district centers are the main settlements on the corridor.

Characteristics With Respect to Tourism: Mass tourism, sea tourism (beaches, wishermens' wharfs, urban tourism) culture tourism (urban fabrics, museums, monuments and individual historical buildings) are the main tourism characteristics of the corridor. The corridor has the departure points for tours visiting the interior sections.

Basic Tourism Products and Special Days: Beaches, yacht tourism opportunities, departure points for tours, points for rest, relatively quality facilities, culture tourism products and festivals are the main tourism products. The festivals are: Rize Tea and Tourism Festival on the first week of June; İyidere Sea Festival on the fourth week of July; Fındıklı Green Gold Sea Festival on the third week of August; Çayeli Culture and Arts Festival on the fourth week of August; Pazar Culture, Arts and Sports Festival on the fourth week of August and Ardeşen Hawk 53 Festival on the fourth week of August.

Resources for Tourism and Location: This corridor is in intensive interaction with Trabzon as compared to other areas. The corridor is the entrance point to important plateaus and national parks such as Ayder, Kaçkar and Fırtına Valley. Infrastructure is relatively more suitable for the development of accommodation facilities. The hills adjacent to the coast offer vista points. The corridor house many historical assets and thus is rich in terms of cultural assets. Points of interest for daily visits are: In the District of Rize; Castle of Rize, Atatürk Museum, Kurşunlu Mosque, Gülbahar Mosque, Orta Mosque, Cezayirli Ali Pasha Camii, historical urban fabric, Ayane, Beaches of Çiftekavak and Alipaşa, Tea garden of Çaykur, Ayazma Hill; in the District of Ardeşen; Greek Church, Prinçli Village Mosque, Köprüköy Bridge, Seslikaya caves; in Çayeli; Castle of Zeleki, Cafer Pasha Mosque; in Derepaşarı; Uzunkaya Mosque; in Fındıklı; Çağlayan Village Bridge and in Pazar; Ciha Castle and Kız Castle.

Recommendations for the Development of the Corridor: Priority should be given to the renewal of Rize city center with provision of adequate infrastructure and urban amenities. Parts of the port and wishermens' wharf can be reorganized as yachts anchoring and maintenance areas.

New facilities for accommodation shall be located outside the traditional urban fabric. The service levels and quality of existing facilities should be improved. Personnel training shall be given to those employees in the sector.

Pedestrianized and shopping districts especially in Rize city center are also recommended.

All settlements along the coast require urban regeneration in order to have efficient and effective interrelationships between different functions within the urban area. The historical fabrics should be rehabilitated and be subject to tourism. Information offices shall be established in these settlements also.

4.1.2.4.11 Rize South Corridor 1

45 kms long axis from Ardeşen to Kaçkar Mountains National Park on the south along the Fırtına Valley.

Settlements on the Corridor: Ardeşen and Çamlıhemşin are the main settlements on the corridor.

Characteristics With Respect to Tourism: Alternative tourism products with natural and cultural assets are the main characteristics. The area is well known both nationally and internationally for nature sports activities. The corridor has important potential for tourism development with its endemic flora, extraordinary natural landscape, archeological assets, traditional way of life and baths.

Basic Tourism Products and Special Days: The corridor is one of the major alternative tourism centers of Turkey. Major products for tourism are: nature and nature sports, flora, cultural values, baths, plateaus, traditional way of life and traditional settlement patterns and architecture and local dishes. Traditional festivals are other attractions along the corridor. These are: Çamlıhemşin – Ayder Culture and Tourism Festival in June; Rize (Çamlıhemşin) Mountaineering and Tourism Festival on the second week of July and Ardeşen Kaçkar – Altıparmak Plateau Festival on the second week of August.

Resources for Tourism and Location: There is a very important tourism potential along the Fırtına valley that forms the axis. The area is very rich in flora, history, arched bridges, tea gardens spawn within the forest areas and extraordinary natural landscapes. Ayder Plateau Tourism Center located on the southern section of the corridor is a national attraction.



Ayder Plateau



Ayder Plateau

Source: Tourism Brochure, Rize Directorate of Provincial Special Administration,

Ayder Plateau is also located within the Kaçkar Mountains National Park. The bath in the plateau is another attraction by itself. The plateau offers unique sceneries with its flora, houses, water resources and waterfalls. It is very suitable for nature sports such as trekking and camping. There are also historical ruins in its close vicinity. Accommodation and daily facilities are relatively developed. The area attracts visitors from foreign countries as well. The national park also has one of the major glaciers in Turkey. Glaciers and glacier lakes and valleys are very attractive. Domestic and foreign professional mountaineers utilize the northern route through Ayder for climbing.



Kaçkar Mountains

Source: Tourism Brochure, Rize Directorate of Provincial Special Administration

Kavron plateaus within the park are also important for the tours. Especially The Higher Kavron Plateau is located on the route of the mountaineers and is being utilized as a camping site. The points of interest for daily visits are: Zil Castle, Bala Castle, Waterfalls of Gelinkülü and Bulut, plateaus of Pokut, Sal, Hazındağ, Elevit, Polavit and Trevit, glacier lakes of Öküzyatağı, Deniz and Derebaşı, and the bridges on Firtına streams.

Recommendations for the Development of the Corridor: Çamlıhemşin is recommended to be the center for meeting the accommodation demands within the Park. For this purpose, infrastructure and social amenities should be completed. Development of boarding houses should be supported and local population should be trained in tourism.

An Area management Plan should be prepared for Ayder Tourism Center and the existing Development plan shall be revised accordingly. Traditional architecture must be preserved and plateau houses can be utilized as boarding houses. Trekking routes and appropriate direction and information signs shall be established.

Long Term Development Plan for Kaçkar Mountains national park shall be completed as soon as possible and different zones shall be defined according to their characteristics. Area Management Plans shall be prepared in accordance with this long term plan. Motor traffic shall be prohibited at higher altitudes; trekking routes and appropriate signs shall be established. Camping sites along the trekking and climbing routes are also recommended.

4.1.2.4.12 Rize South Corridor 2

85 km. long north – south axis up to the border of Erzurum province.

Settlements on the Corridor: İspir (Erzurum), İyidere, Kalkandere and İkizdere are the main settlements on the corridor.

Characteristics With Respect to Tourism: As state above, unspoiled natural assets, traditional way of life, plateau tourism and opportunities for nature sports are the main components of alternative tourism potential of the corridor.

Basic Tourism Products and Special Days: Basic tourism products are the natural and cultural assets located mainly on the plateaus and these carry important development potentials. Besides these, festivals are also opportunities. These are: İkizdere Güneyce

Varda Plateau Festival on third week of August and İkizdere Çağrankaya Plateau Festival on the fourth week of August.

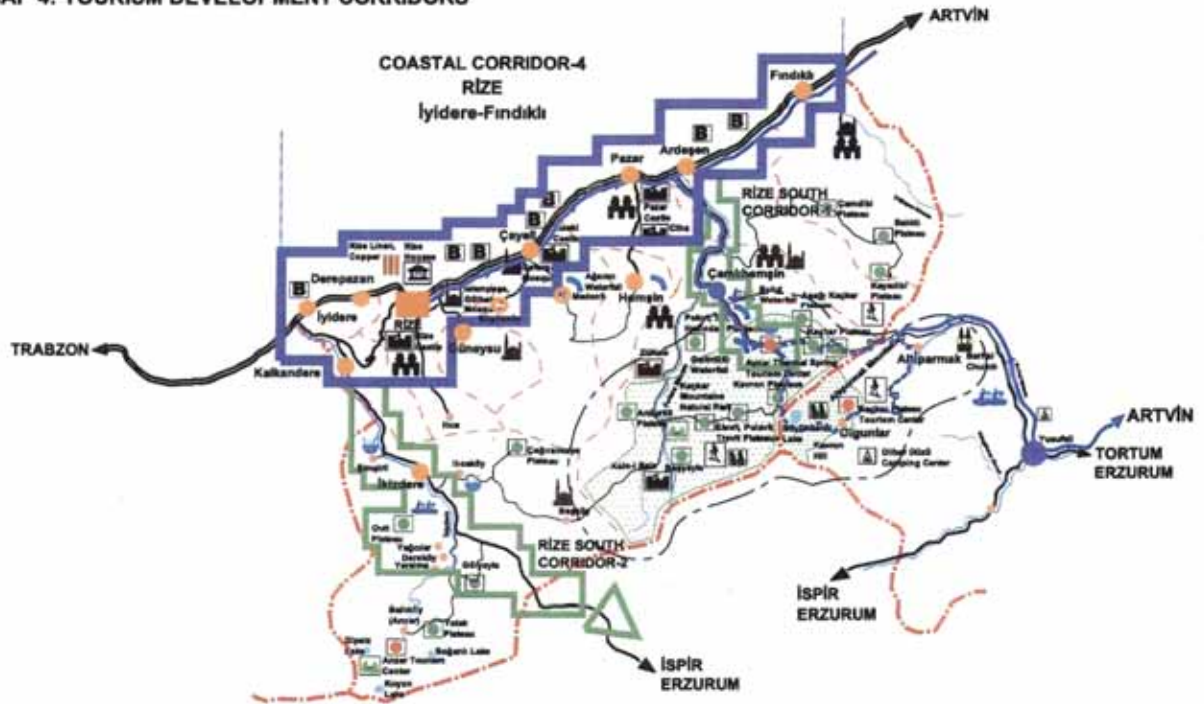
Resources for Tourism and Location: The road to İspir from the coast has extraordinary natural landscape. The road that extends parallel to İyidere-İkizdere Stream is thus visually very rich. Ovit Plateau Group located on the corridor can be utilized with its undiscovered natural assets, its plateau culture and its local traditional architecture. There is an accommodation facility on the plateau which is relatively easy to access. In case the road to İspir, as an alternative southern connection, is improved, the corridor's potential for development will increase. İyidere-Ikizdere Stream along the road is suitable for rafting and fishing. The plateau and village roads that extend west from Kaçkar Mountains National Park connect to the main axis. This is appropriate for the development of alternative routes for tours. Natural and cultural assets for daily visits are as follows: İkizdere Diktaş Village Ayazlı Bridge, İkizdere Çamlık and In-forest Recreation Area, Çiçekli Plateau, Varda Plateau and Spring and Cimil Plateau.

Recommendations for the Development of the Corridor: It is recommended that the road that extends from the coast to İspir should be improved. This will enable easier access to interior sections.

Accommodation and daily facilities as well as information offices can be located along the corridor. As with all major settlements, infrastructural services and social amenities require improvements.

An Area management Plan shall be applied to Ovit group of plateaus. Master Plans and Development plans shall be prepared accordingly. Infrastructure and social amenities of the plateau shall be improved. It is also recommended that boutique hotels and boarding houses to be developed in the settlements of Dereköy and Bayır. Trekking routes are recommended with appropriate information and direction signs.

EASTERN BLACK SEA REGION TOURISM DEVELOPMENT STUDY
MAP 4: TOURISM DEVELOPMENT CORRIDORS



LEGEND

- Boundaries**
 - Country Boundary
 - Province Boundary
 - District Boundary
- Settlements**
 - Province Center
 - District Center
 - Municipalities
 - Villages
- Infrastructure and Transportation System**
 - Roads
 - Airport
 - Seaport
 - Fishermen Shelter

Development Corridors

- Coastal Zone Development Corridors
- Inner Zone Development Corridors (Includes the points in one-hour drive distance to the main transportation axis)
- Eco-tourism Development Areas
- Accommodation Points (stations) Near Eco-tourism Areas
- Proposed Corridor and Tour Route in Provincial Scale
- Proposed Walking Route

Historical and Cultural Assets

- Mosque
- Castle
- Bridge
- Church
- Monastery
- Original Civil Architecture Models
- Festivals
- Rocky Graves
- Antique Settlements
- Hand-made Art (Copper, Carpet, Woollen)

Sports Activities

- Camping
- Fishing
- Rafting
- Trekking
- Bird-Watching
- Side Parachute
- Winter Sports
- Grass-Ski

Natural Assets

- Natural Parks and Natural Preserved Zone
- Natural Beauties
- Forest Areas
- Lakes
- River and Streams
- Tourism Center
- Plateaus
- Coast

The duration of the above mentioned tour route is 4 days.



Belde Proje Danışmanlık ve Ticaret Ltd. Şti.

Jemcor Seminer Organizasyon Danışmanlık ve Turizm A.Ş. with associate

| Number of Present Facilities and Beds | | | Proposed Number of Beds | |
|---------------------------------------|----------------------------|-------|-------------------------|----------------|
| RIZE | LICENSED BY MUNICIPALITIES | TOTAL | RIZE | NUMBER OF BEDS |
| NUMBER OF FACILITIES | 8 | 82 | NUMBER OF FACILITIES | 3054 |
| NUMBER OF BEDS | 712 | 3148 | NUMBER OF BEDS | 764 |
| | | 3860 | NUMBER OF BEDS | 0 |
| | | | TOTAL | 3818 |

4.1.2.4.13 Coastal Corridor 5

The coastal section of Artvin province; the 35 kms linear band between the provincial border of Rize and the national border of Georgia.

Settlements on the Corridor: Arhavi and Hopa district centers are the main settlements on the corridor.

Characteristics With Respect to Tourism: Mass tourism, sea tourism (beaches, fishermen's wharfs, urban tourism) border trade, culture tourism (urban fabrics, individual historical buildings), flora and wild life are the main characteristics with respect to tourism. Due its border with Georgia, this coastal section has a dynamic structure.

Basic Tourism Products and Special Days: Beaches, yacht tourism opportunities, the locational characteristic due to its being on the transition route to Artvin center and to interior sections, the border gate, the interim stopover station for transit traffic, relatively higher quality accommodation facilities and services, cultural tourism assets and festivals are the basic tourism products. The festivals are: Hopa Sea Festival between August 27 and September 2 and Arhavi Culture and Arts Festival on the second week-end of July.

Resources for Tourism and Location: The major characteristic of the coastal section of Artvin is its geographical structure in which the forests extend all the way to the sea. Also, the Port of Hopa is an important port in Eastern Black Sea Region. This port has an economic importance due to its servicing international commercial sea traffic. Thus, the major potentials for tourism is along the coast of Hopa. The beaches of Hopa – Kemalpaşa unite sea with the greenery.



Kemalpaşa Beach

Source: Tourism Brochure, Artvin Directorate of Provincial Special Administration,

Çamburnu Natural Preservation Site has Sarıçiçek trees extending into the sea. This Site is also rich in wild life and serves as habitat for migrating birds. Points of interest for daily visits are: Ortacalar Double Arched Bridges, Ortacalar Mosque, Ciha Castle, Sultan Murat Hill and Su Gören Mosque.

Recommendations for the Development of the Corridor: This section also requires care in terms of balance between use and preservation. Utilization of the existing assets should not cause the degradation those very assets it is based upon. Furthermore, urban regeneration programs shall be applied in those settlements along the coast together with

the provision of infrastructure and social amenities as is the case with the coastal areas of Hopa and Kemalpaşa. It is recommended that part of the port in Hopa shall be allocated for yachts' anchoring and maintenance area.

New accommodation facilities that will have higher capacities than the existing ones shall be located outside the exiting settlements reflecting the concepts of t traditional architecture. Kemal Paşa beach requires facilities such as dressing cabins, WC, parking facility and daily facilities.

An Agreement with Georgia for the utilization of Batum Airport will increase the accessibility of this corridor and also other points in the vicinity as well as increasing the regional dynamics.

4.1.2.4.14 Artvin South Corridor 1

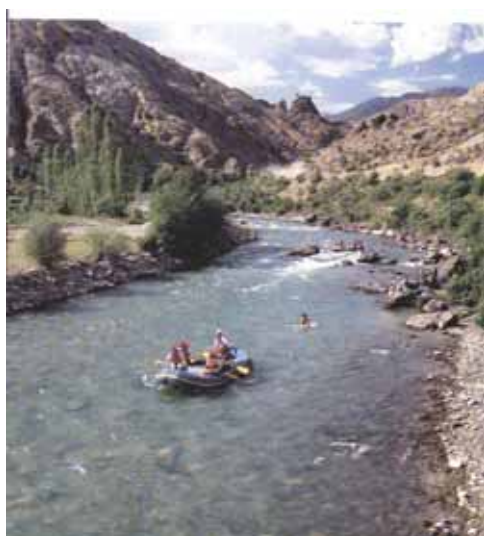
180 kms section along the highway from Hopa center, through Artvin city center to the border of Erzurum Province.

Settlements on the Corridor: Hopa, Borçka, Artvin central district and Yusufeli are the main settlements on the corridor.

Characteristics With Respect to Tourism: Undisrupted eco-systems, natural landscapes and cultural-folkloric assets are the main components of alternative tourism potentials along the corridor.

Basic Tourism Products and Special Days: Basic products are national parks, natural landscapes, river and mountain sports, wild life, historical places and folkloric assets. The festivals are: Artvin Kafkasör Culture, Arts and Tourism Festival on the 4th weekend of June; Borçka Macahel Caucasian Bees and Eco-Tourism Festival on August 30; Kaçkar mountain Friendship and Love Walk August 27; Yusufeli Traditional Wrestling on the 4th weekend of September.

Resources for Tourism and Location:



Çoruh River

Source: Ministry of Culture and Tourism, General Directorate of Information

The main resource on the corridor is the River Çoruh. This world wide famous rafting route attracts both domestic and international rafters. On the other hand, Artvin is rich in terms of other natural assets also. Artvin city is the departure point for the best preserved eco-systems within the country. Artvin city center also serves as the accommodation point for these visits to interior sections. Hatila National park and Kafkasör Tourism Center are located nearby. Kafkasör is especially attractive with is extraordinary landscape. Accommodation is possible in the bungalows. The festivals of the plateau is nationally famous.

Hatila Valley National Park is also a very sensitive zone. Located only 10 kms. To Artvin city center, the Park is a habitat for more than 500 endemic vegetation types together with its wild life. There are camping sites for daily uses.



Hatila Valley National Park



Artvin City Center

Source: www.artvin.gov.tr and Tourism Brochure, Artvin Directorate of Provincial Special Administration

Another potential along the corridor is Yusufeli. It can be also reached via Erzurum Airport and has a relatively more developed tourism infrastructure.



Kaçkarlar – Glacier Lakes

Source: Tourism Brochure, Artvin Directorate of Provincial Special Administration

Çoruh and Barhal rivers pass through the city center and are being utilized for recreational purposes. Kaçkar Tourism Center and Yaylalar Village is another potential. This area is the interim stopover point for those climbs that use the southern route. This Tourism Center is rich in natural assets and have relatively more developed infrastructure and boarding houses.

The natural and a cultural assets for daily visits are as follows: Berta Bridge in Borçka, İbriga Şapeli Karagöl Natural Preservation Area, the settlement of Camili, Gorgit Natural Preservation Area, in Artvin central district, Artvin Castle, Dolishane Church, Porta Monastery; in Ardanuç district, Hell Canyon, İskenderpasha Mosque and in Yusufeli, Four Churches Monastery and Barhal Church.



Karagöl Natural Preservation Area

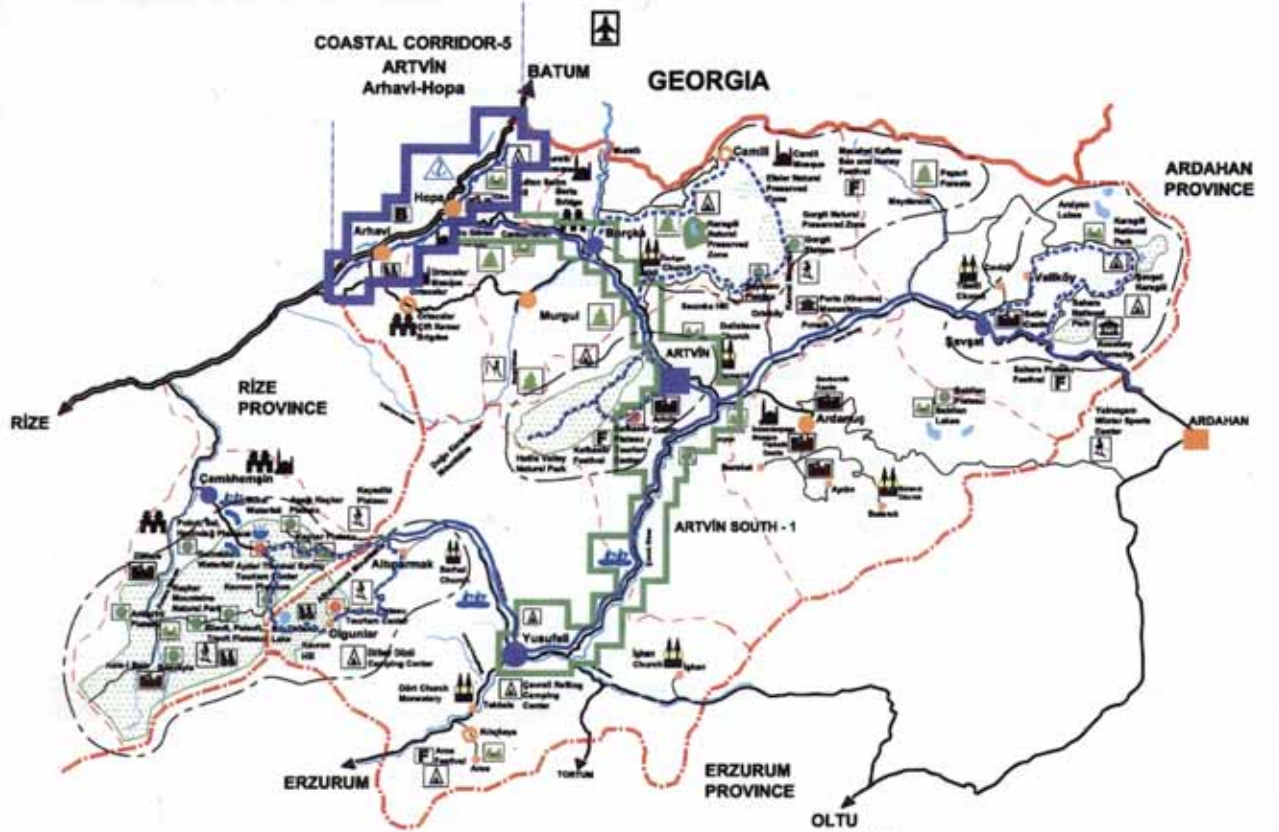
Source: Tourism Brochure, Artvin Directorate of Provincial Special Administration

Recommendations for the Development of the Corridor: Artvin city center should serve as the accommodation point for visits to Hatila and Karagöl-Sahara National Parks. The dams on the River Çoruh are recommended to be utilized for water sports and recreational purposes. Pedestrianized and shopping district in Artvin is recommended. Information and direction signs should be posted in Kafkasör Plateau.

The new settlement for Yusufeli shall be designated as soon as possible and necessary planning in conformity with needs and the environment should be undertaken. The houses of Altıparmak, Olgunlar and Yaylalar Villages can be utilized as boarding houses. Also, improvements are recommended for the existing facilities.

The Long Term Development Plans for Kaçkar Mountains, Hatila and Karagöl-Sahara National Parks should be finalized. Area management plans shall be prepared accordingly and all construction and other activities shall comply with this Plan. Motor traffic should be banned in areas of high ecological sensitivity. Trekking routes and camping sites shall also be established in accordance with this Plan. The entrances to the parks shall be organized and controlled and information offices should be established.

EASTERN BLACK SEA REGION TOURISM DEVELOPMENT STUDY
MAP 5: TOURISM DEVELOPMENT CORRIDORS



LEGEND

Boundaries
 Country Boundary
 Province Boundary
 District Boundary

Settlements
 Province Center
 District Center
 Municipalities
 Villages

Infrastructure and Transportation System
 Roads
 Airport
 Seaport
 Fishermen Shelter

Development Corridors
 Coastal Zone Development Corridors
 Inner Zone Development Corridors (Includes the points in one-hour drive distance to the main transportation axis)
 Walking and Nature-Related Tour Routes
 Eco-tourism Development Areas
 Accommodation Points (stations) Near Eco-tourism Areas
 Proposed Corridor and Tour Routes in Provincial Scale
 Proposed Walking Route

Historical and Cultural Assets
 Mosque
 Castle
 Bridge
 Church
 Monastery
 Original Civil Architecture Models
 Festivals
 Rocky Graves
 Antique Settlements
 Hand-made Art (Copper, Carpet, Wooden)

Sports Activities
 Camping
 Fishing
 Rafting
 Trekking
 Bird-Watching
 Side Parachute
 Winter Sports
 Grass-Ski

Natural Assets
 Natural Parks and Natural Preserved Zone
 Natural Beauties
 Forest Areas
 Lakes
 River and Streams
 Tourism Center
 Plateaus
 Coast

The duration of the above mentioned tour route is 4 days.

Belde Proje Danışmanlık ve Ticaret Ltd. Şti.

Semer Organizasyon Danışmanlık ve Turizm A.Ş. with associate

Number of Present Facilities and Beds

| ARTVIN | LICENSED by MINISTRY | LICENSED by MUNICIPALITIES | TOTAL |
|----------------------|----------------------|----------------------------|-------|
| NUMBER OF FACILITIES | 7 | 80 | 87 |
| NUMBER OF BEDS | 773 | 2217 | 2290 |

Proposed Number of Beds

| ARTVIN | NUMBER of BEDS |
|---------------|----------------|
| COUNTY ZONE | 1762 |
| WATER ZONE | 0 |
| WILDLIFE ZONE | 1762 |
| TOTAL | 3524 |

4.1.2.4.15. Recommendations for the Marketing of the Corridors

The issue related with the strengthening of the local travel agencies that is determined in the related part of the report, is being recommended for the whole tourism corridors. Establishing an organization among the local tourism agencies in the Region, and providing coordination between the accommodation facilities and tourism agencies is a necessity. The introduction and promotion of the corridors should be made effectively by using every kind of advertisement opportunities; including booklets, brochures, preparation and distribution of CD's, participation to the fairs, e-tourism

Major establishments and agencies organizing nature and culture related tours both nation-wide and internationally, should be contacted. In addition, alternative tourism and nature-sports opportunities of the corridor should be introduced by establishing coordination with the amateur groups interested in nature-sports, with the associations or organizations. Informative units should be established working in coordination with the big tour operators both nation-wide and internationally.

4.1.2.4.16 Necessary Institutional Regulations and Motivation Programs for Tourism Corridors

Tourism development in the corridors depends upon an effective organization. The corridors include varying assets. Emerging also due to geographical and cultural features, the tourism inventory does naturally not distribute according to administrative boundaries. For this reason, each development corridor involves more than one district or province at the same time. For example, the corridor lying along the state highway on the coast passes through the territories of five provinces while the Trabzon-Gümüşhane corridor passes through two provinces.

For the development of activities envisaged for the corridors, different administrative units must cooperate. Such cooperation is a must both for ensuring coordination in the tourism sector, facilitating marketing and publicity and improving service efficiency and for devising joint and inexpensive solutions for the supply of infrastructure.

To ensure this type of togetherness, it is recommended that administrative units (provinces and districts) which share the same geography and cultural assets establish a "Tourism Development and Infrastructure Union of East Black Sea Local Administrations" or a similar other entity.

The legal ground exists for the formation of such a union. The Municipality Law enables the formation of such unions and provinces and districts to become members to them. In fact, there are examples of such unions in Turkey.⁹

Such a new organization could provide effective services in tourism and infrastructure development, promotion and marketing fields and in the auto-control of the sector.

4.1.2.4.17 Environmental and Tourism Training Programs for Tourism Corridors

In Turkey and in the Region, it is not a widespread practice for the public and private sectors to elaborate sectoral development programs in cooperation. Therefore, the members of such a new organization will have to be subjected to a certain training program.

⁹ For example, certain municipalities in Turkey have formed the "Union of Turkish Municipalities" and certain provinces have formed the "Union of Provinces".

To this end, different opportunities are available. A leading one of them is provided by the Public Administration Institute of Turkey and the Middle East. This institute is experienced on such organizations and the manpower training and could also acquire technical support on tourism from the sectoral organizations, e.g. the Association of Tourism Investors (TYD) or the Union of Turkish Travel Agencies (TÜRSAB) or the Ministry of Culture and Tourism.

A similar training program could be offered by relevant faculties of universities in Turkey. For example, the Faculty of Political Sciences, Ankara University has a vast experience on this field. This Faculty could also receive contributions from colleges of the same university which offer education on tourism.

Another opportunity regarding this issue would be the experiences of the Union of South Antalya Municipalities for Tourism and Infrastructure (GATAB), the Union of Turkish Municipalities or the Union of Provinces.

After such an organization is realized, training programs should be determined by that organization.

4.1.2.5 Creating New Types of Tourism (Strategy 5)

There are certain types of tourism which remain outside the main tourism corridors or which are located on those corridors but are to be added newly to the Regional tourism inventory. These have a big potential due to natural peculiarities of the Region.

Basic and Common Features of New Types of Tourism:

Preferred by those who desire to know about the nature and different cultures and live within such assets, this type of tourism has certain basic features.

- i. The visitor has information about his/her destination in advance. He already knows about the local features.
- ii. During his/her visit, he/she would like to meet such features. A loss of the peculiar nature of assets would mean a loss of the potential, reduced visitor satisfaction and eventually loss of the market.
- iii. What visitors would look for in accommodation and eating/drinking facilities are again local features. These are small, clean and hygienic places where local features are offered.

4.1.2.5.1 Types of Tourism That Offer Special Products – Green Tourism

Main Purpose:

Rural settlements located in the Region have qualities that could provide for all sub-types of green or rural tourism. The Regional geography and the nature of the Regional settlements have caused a diversification of both natural beauties and agricultural activities. It could be possible to make use of this diversity for purposes of rural tourism. In inland zones of the Region, specifically in rural and upland settlements, activities that highlight upland lifestyle could develop. On the coast, rural settlements where tea and hazelnut plantations exist provide suitable environments for farm tourism. On the other hand, areas where fishermen's shelters exist would be attractive for those who have a special interest in sea sports.

4.1.2.5.1.1 Program 1 - Traditional Upland Lifestyle

Outline:

Uplands located in inland sections of the Region appear to be areas which could accommodate a wide range of different activities ranging from photo-safari to plant identification and which also could ensure living integrally with the nature and involvement in agricultural activities including primarily animal breeding and bee-keeping. Reduced use and unoccupied status of upland houses today provides the possibility for developing tourism by making use of this stock. Furthermore, the use of traditional upland dwellings for purposes of tourism will reduce both tendencies towards building development in the environment and initial installation costs of investments.

4.1.2.5.1.2 Program 2 - Farm Tourism

Outline:

Similarly, tea and hazelnut plantations concentrating in the coast or in nearby zones could house another type of activity. Villages equipped with hazelnut orchards in the zone lying from Ordu to Trabzon and rural sub-settlements and quarters located in tea gardens in the coastal zone from Trabzon to Artvin are suitable for activities that could be defined as farm tourism.

4.1.2.5.1.3 Program 3 – Use of Features Peculiar to the Region - Fishing

Outline:

The Black Sea shores have the largest number of marine structures (ports, wharves, fishermen's shelters, landing berths, etc) in Turkey. The local people's life style is integrated with the sea. Fishing and seamanship are traditional occupations in the Region. The Region is identified with fishing, particularly sprat (hamsi). Fishing and sprat fishing could be a field of special interest.

Out of the fishing season, there are other activities that could be carried out. In addition to line fishing, use of rented boats for purposes of trips to the close vicinity would also add to activity in the Region.

Main Purpose: The purpose of these activities is to offer special products to persons who have special interests. With the development of an alternative tourism, especially the rural people will have additional sources of income.

Candidate Sites:

The activities based on village and upland life style as addressed under **Program 1** could be carried out in rural settlements of all the Regional provinces and particularly in their uplands. However, it is recommended that this type of activities should be started in rural settlements and uplands of the provinces of Rize and Artvin in the first stage. Göroluk, Yukarı Şimşirli and Şenyuva villages near Çamlıhemşin of Rize and their uplands are suitable for such activities. In addition, Çamlık, Dereköy, Yeralan and Sivrikaya of the district of İkizdere have suitable features with their traditional rural architecture and rural life style. In the province of Artvin, Salkımlı, Ahlat and Şehitlik of the central district, Yavuzköy and Meydancık near Şavşat and settlements and uplands near Camili could be selected as pilot areas for carrying out such activities.

For farm tourism included under **Program 2**, many sections of the Region have suitable features. As in Program 1, a selective approach must be taken for initial applications. Notwithstanding, farm tourism should also be encouraged in rural settlements near the districts of Ünye and Perşembe of the province of Ordu and rural units near the city center of Giresun. In the eastern section of the Region where tea plantations are dominant, however, farm tourism should be encouraged in rural settlements of Akçaabat, Beşikdüzü and the city center of the province of Trabzon; rural settlements of the central district and the districts of Ardeşen and Fındıklı in the province of Rize; and rural settlements of the districts of Arhavi and Kemalpaşa of the province of Artvin should be encouraged in the initial stage. In the province of Gümüşhane, farm tourism has a potential for development in rural settlements, including primarily the village of Sariçiçek and also including villages near the central district of Gümüşhane and Zigana ski center as well as the rural settlements near Tortum and Örumcek Forest.

The Program 3 will be implemented in the coastal zone. Activities could be carried out particularly in settlements where fishing is practiced, including primarily sprat fishing and fishermen's shelters exist. These settlements are Ünye, Fatsa, Bolaman, Yalıköy, Mersinköy, Kışlaönü, Efirli and Gülyalı in the province of Ordu; Bulancak and Tirebolu in the province of Giresun; Beşikdüzü, Vakfıkebir, Çarşıbaşı, İncir (Yoros), Darıca, Akçaabat, Faros, Yomra, Araklı, Balıklı and Yeniay in the province of Trabzon; Of, Gündoğdu, Bozukkale, Çayeli Taşhane, Pazar, Ardeşen and Kanlıdere in the province of Rize; Arhavi and Kemalpaşa in the province of Artvin.

Green or rural tourism is a new type for the Region. The local people must adopt such activities, and this requires the implementation of motivation programs, which will sometimes be time-consuming. For this reason, it would be better that rural settlements to be opened to this type of tourism be identified jointly by the Provincial Directorates of Culture and Tourism and NGO's that work on tourism and environment.

Possible Actions (What Should Be Done):

A major task that must be done for the development of this new type of tourism is that the dwellers of rural settlements must be told about the importance of tourism and the environment. Additionally, the local people should be ensured to show their traditional hospitality to domestic and foreign visitors.

Another requirement is that pioneering tourism investors in this field should be selected and supported. If local leaders adopt this approach and prove successful, this activity will also be adopted by other dwellers.

In this context, the training of women has a special significance. What is important in green tourism that the visitor should integrate with the local and traditional life and become a part of it. Visitors will probably stay in a space that is specifically arranged for this purpose. Under these circumstances, the adoption of tourism by the women is vitally important.

Rural dwellings and upland houses must be improved and particularly sanitary amenities, including primarily WC's must be installed.

Another issue that must be dwelt on is that, in or near areas where this type of activities will be carried out, major social amenities must be provided, including primarily security. For example, amenities for communication and health services should be installed and all visitors should be informed of their address and telephone numbers.

4.1.2.5.2 Eco-tourism

Main Purpose:

To preserve the sensitive natural and cultural assets of the Region and enable the visitors meet them. With this type of tourism, another purpose is to ensure an additional income to the low-income people, who constitute the most disadvantageous group in general.

Outline:

In eco-tourism, activities such as nature-seeing, botany, photo-safari, trekking, camping, mountaineering, rafting, etc would be carried out.

Candidate Sites:

In the Region, there are areas of the status of national park or nature preserve in the provinces of Trabzon, Artvin and Rize. In these areas and in all the Regional provinces, including principally Artvin and Rize, there are zones which would foster eco-tourism.

The Hatila Valley National Park located in the province of Artvin has a big eco-tourism potential with its rich and peculiar natural assets. Its peculiar vegetation that reflects the Mediterranean climatic conditions (more than 500 endemic species of plants) and wild life environment worth to see. Hatila Valley is only 10 km to the city of Artvin. In the Hatila Valley National Park, trekking, camping, botanic survey, wild life survey, line fishing, photo-safari, etc could be carried out.

The Sahara-Karagöl National Park is highly rich in natural assets and houses several groups of uplands. Visually, it is very impressive with its rich natural landscape, old-aged fir and spruce forests, and lakes of all sizes. Sahara-Karagöl appears to be a zone with a high potential for eco-tourism. In the Karagöl-Sahara National Park, activities such as trekking, camping, cycling, flora and fauna survey, and survey of naturally formed lakes, etc could be carried out.

The Kaçkar Mountain National Park is located within the provinces of Artvin and Rize. It is outstanding with its forests as well as its peculiar topographic and geologic structure. It also houses some of the limited number of glaciers existing in Turkey. The associated glacial lakes and valleys are unique. In the Kaçkar Mountain National Park, very many activities could be carried out, such as visiting cultural assets of monumental nature, nature-seeing walks, flora and fauna survey, camping, seeing uplands and upland culture, para-gliding, rafting, line fishing on Firtına and Hala brooks, mountaineering/summit climbing, visiting glaciers and glacial lakes, etc. Even today, the Kaçkar Mountain National Park is among the areas where eco-tourism has much developed in Turkey, considering both nature walks and summit climbing. With these activities, which are being mostly carried out by foreign visitors, as well as the rafting activities being done in the river Çoruh, Kaçkar Mountain has become a focus of eco-tourism.

Altındere, located in the province of Trabzon, is important for purposes of eco-tourism, with its natural assets as well as cultural assets, including primarily the Sümela Monastery. One superiority of Altındere is that it is located nearby other important potential areas, e.g. Zigana Ski Center and groups of uplands, and it can be easily accessed.

The Gorgit Natural Reserve is interesting with its old-aged forested areas comprising alders, firs, spruces, beeches and birches. The preserve is also rich in wild life and is located on the migration route of migrating predator birds.

The Camili-Efeler Natural Reserve has one of the limited number of intact forest ecosystems existing in entire Europe. It also has old-aged forests and natural habitats and is located on the migration routes of predator birds. The area having the status of military zone, its eco-tourism potential could be utilized after necessary permits are obtained and statutory regulations are issued.

In the Gorgit and Camili-Efeler Natural Reserves, activities such as visiting old-aged forests for scientific surveys, bird and butterfly observation, traditional lifestyle observation, tasting local flavors, photo-safari and nature-seeing could be carried out.

Possible Actions (What Should Be Done):

For the development of eco-tourism, the importance of tourism and the environment must be conceived by the dwellers of rural settlements located near these areas. This understanding should also be adopted by the dwellers of the district townships located in close vicinity of areas which are highly sensitive environmentally, e.g. national parks or nature preserves, and for which, accommodation possibilities are recommended.

In this context, the motor vehicle traffic must be restricted and trek routes and camping areas must be arranged in the Hatila National Park. At certain points, facilities exclusively directed towards daytime use must be installed, and demands for night-stay demands must be met in the city of Artvin.

Night-stay needs for visits to the Sahara-Karagöl National Park should be met in the close vicinity and particularly in Şavşat. Traditional rural dwellings existing in the rural settlements located outside or within the limits of the national park should be utilized for boarding purposes, the latter being subject to a management plan to be drafted, avoiding additional building development.

Within the limits of the Kaçkar Mountain National Park, there are very many rural settlements, including primarily Ayder, where tourism facilities have concentrated, as well as many groups of uplands. This situation should be considered in management planning and physical planning studies. Accommodation demands should be met in the rural settlements of Çamlıhemşin in the province of Rize. In the section of the national park remaining in the province of Artvin, it is recommended that the stock of dwellings already existing in the villages of Altıparmak, Yaylalar and Olgunlar should be improved and converted to boarding houses. Similarly, only the existing upland dwellings should be used in uplands.

In the Altındere National Park, too, arrangements should be undertaken in accordance with the basic guidelines set forth above. The current tendency to meet accommodations outside the park limits should be supported and maintained.

Accommodations for visits to the Camili-Efeler and Gorgit Nature Preserves should be provided in the close vicinity and particularly in the district town of Borçka. In this respect, Borçka is expected to become subjected to major urban arrangements.

The vehicular traffic must be restricted in all national parks and nature preserves. By providing trek routes and biking routes on suitable topography, the use of organic energy should be highlighted in visiting such areas. Markings should be provided along such routes and camping areas should be arranged.

Guidance services should be made available in all areas where eco-tourism could developed, including primarily national parks and nature preserves. Specifically in relation to national parks and nature preserves, accurate and satisfactory information should be

provided as regards why they were granted that status, the formation of old-aged forests, the flora and fauna, and the geological formations. The training of local guides is a must. Yet another requirement is the information of tour routes and the preparation of appropriate maps for them (Map 6).

In all forest areas and groups of uplands where eco-tourism could develop, guidance and information boards should be provided and nature-seeing and walking routes should be arranged.

Amenities must be installed at appropriate scales and with appropriate qualities. In the park, daily amenities should be constructed in line with the plans approved by and the opinions of the General Directorate of Nature Preserves and National Parks. In this context, opinions and contributions should also be obtained from NGO's.

4.1.2.5.3 Social and Ethnographic Tourism

Main Purpose:

The basic purpose of this type of tourism is to learn about the local culture in urban and rural sections, perceive their lifestyle, and improve the interaction, close-up and tolerance between different cultures. With this type of tourism, another aim is to cause a better publicity of Turkey.

Outline:

This program could be implemented in areas where the traditional culture and lifestyle have been preserved. In such areas, the traditional urban or rural fabric and the architectural style must have been preserved, too. If traditional activities, e.g. handicrafts are still being practiced or exhibited and supplied, this will provide an opportunity for the development of this type of tourism.

Candidate Sites:

In the Region, the traditional settlement texture especially in the urban section has been destroyed to a great extent. And the number of architecturally peculiar individual structures has decreased. Therefore, possibilities for the development of social and ethnographic tourism have largely reduced. Notwithstanding, there are a few sections which can still be preserved. Major ones of them are certain sections of Orta Mahalle in the city of Trabzon; Zeytinlik Mahallesi in the city of Giresun; Tirebolu in the province of Giresun; Perşembe and Ünye in the province of Ordu.

Possible Actions (What Should Be Done):

For the development of social and ethnographic tourism, both the traditional life, usage and customs and the traditional manner of production must be continuing and the traditional texture and architectural style must be being maintained. Practices in areas where this type of tourism is developed in Turkey should be taken as a model¹⁰ and lessons should be derived from bad examples¹¹.

One of the leading tasks is to support the civilian organizations that take efforts for the preservation of the traditional culture. For example, NGO's related to cultural issues, neighborhood-level preservation and beautification societies, tradesmen associations, Turkish Artistic Music and Turkish People's Music societies and folkloric dance teams must be formed and developed. The preservation of the local architectural identity is another must.

The adoption of such activities and, in general, the tourism sector by the city or neighborhood dwellers is yet another pre-condition for development. To ensure this, an implementation of social motivation programs by relevant units might be necessary.

¹⁰ Safranbolu in the province of Karabük, Göynük in the province of Bolu and Beypazarı in the province of Ankara have proven successful in Social and Ethnographic Tourism. In these settlements, both peculiar assets such as the traditional life, artifacts and the cuisine are offered and the preserved architectural heritage is exhibited to visitors.

¹¹ Very many historic sections of Istanbul have been opened to tourism with their peculiar assets lost. For example, Ortaköy and Kumkapı have now lost their peculiar features. A similar condition prevails in Kaleiçi of Antalya, where cultural assets have been lost despite the architectural heritage has been preserved.

4.1.2.5.4 Institutional Arrangements and Motivation Programs That Must Be Implemented in New Tourism Areas

The development of new types of tourism depends on the adoption of them by the society. Such adoption should also be apparent in institutionalization. In this context, certain duties fall upon the central government, local administrations and civilian organizations.

The central government should take measures to encourage such activities. Such measures might be in the form of appropriate project support, aids in kind, widespread manpower development programs and effective publicity. In addition, the Provincial Culture and Tourism Directorates should undertake local surveys to identify and support “pioneering tourism investors”. Such pioneering entrepreneurs could be assisted in various ways, such as providing information, including in publicity documents and providing moral support.

Contributions by the Provincial Private Administrations and subordinate local administrations, municipalities and village or quarter administrations will be determinative in achieving success. Certain contributions such as the use of some local funds for this purpose and priority granting in physical arrangements and in supply of infrastructure and social amenities would be necessary.

The NGO’s in the Region should be the best supporters of this new type of tourism. A new and alternative tourism could develop only if social support is provided to entrepreneurs. In addition to such moral support, civilian organizations should also assist entrepreneurs in areas like environmental and tourism training and language courses. With such programs, a special importance should be given to women.

With the development of new sectors, entrepreneurs will form their own organizations to establish well their position in the sector, including publicity and marketing.

Contributions by academic circles to new tourism activities would be vocational training programs and courses and would include other areas as well.

Finally, the private sector will provide contribution to newly developed types of tourism specifically in the form of financing and investments. Particularly the businessmen living outside the Region must develop an interest in the sector. As a matter of fact, in areas where this type of tourism is developed, the initial investments and contributions have come from the private sector.¹²

4.1.2.5.5 Environmental and Tourism Programs for Local People

In tourism activities directed towards the Natural and Cultural Assets, service supply necessitates special qualities. A leading one of them is that the local people should be aware of the assets they have and should supply services in an acceptable quality and hygienic condition without disturbing the traditional life style. All these requirements entail the implementation of awareness-raising and training programs for the local people on tourism and the environment. Such programs must be implemented by all the sector-related parts.

¹² The initial development and restorations in the district of Beypazarı were started by a private group of companies.

A second important issue is that these new types of tourism should be covered and supported by the local, regional and national media. Only thus, the moral support and market needed by the sector could be achieved.

5 Plan of Actions

In order to realize the policies and strategies formulated for the development of the tourism sector, the actors involved and their respective roles and duties need to be defined. Which partners of the sector are going to assume the responsibilities regarding each strategy and how they are going to do this must be clearly outlined. Partners individually have different legal status and this requires total increase in the capacities for the sector to develop. In addition to this, training the necessary manpower is also required for successful implementation.

5.1 Basic Characteristics of the Region, Policies, Strategies and Stakeholders of the Sector

One of the tourism development policies in the Region is based on the assumption that the tourism sector is a locomotive sector for regional development in general and all measures for the development of the sector are to be defined in detail. The supply and demand sides, institutional capacity increase and human resources development are dealt within this respect.

The secondary important policy is based on the assumption that the tourism increases the incomes of the people in the Region. This characteristic must be recognized by the local initiatives and approved and supported by the regional population.

Against the relatively underdeveloped character of the Region, the opportunities offered by the cultural and natural development potentials indicate that tourism can be a locomotive for the general well-being of the Region and thus prove the validity of the first policy.

Nearly all countries agree that the proper development of the tourism sector requires the support of civilian initiatives and entities. The development should commence and continue through civil initiative independent of the actions by the public sector and especially large scale public investments. The supply side and development should be programmed in stages in view of the increases in demand. The Region has environmentally highly sensitive areas and issues. Proper preservation of these assets requires the sense of ownership of these assets by the regional population. The Region has extremely sensitive zones. There should be a public awareness that these assets can be utilized by the tourism sector only if the characteristics of these assets are preserved. The second policy is recommended along these lines.

In this respect, forecasts and recommendations for development are formulated in accordance with a series of strategies designed. Above all, proper development of the sector is contingent upon successful promotion and marketing that will result in the increased share in the world-wide market. Tourism products, on the other hand, will differentiate according to the choice and demand structure of the visitors.

The strategies formulated for promotion, marketing and product differentiation are compiled under the headings of "Making the Image for the Eastern Black Region", "Increasing the Visitor's (or Customer's) Satisfaction", "Relations With Tour Operators", "Establishing the Corridors Within Which Assets Subject to Tourism are Concentrated" and "Development of New Types of Tourism".

Success and increased market share in tourism is based upon the right “image”. The cultural, natural and folkloric assets of the Region are suitable for the recreation of this successful “image of Eastern Black Sea”. In order to attain such an image, an effective promotional campaign is required. The national parks, areas of natural preservation, old forests, coastal areas and the beaches and all aspects of the rich flora and fauna should be utilized by this campaign. Besides these, the campaign should also address the cultural assets, traditional urban fabrics, historical sites and individual monuments dating back to different periods. Also, the Region is nationally well known with its endemic folkloric assets. Local music, dances, dishes and apparel are all suitable for image making. The partners of the sector are expected to utilize these endemic assets of the Region especially in their promotional and marketing activities.

An important strategy is increasing visitor’s (customer’s) satisfaction and as a result increasing the market share. Visitor’s satisfaction will be increased by his/her easy access to true and valuable information about the Region, the physical high quality of the facilities, high quality service provision, developed transport and infrastructural services, provision of adequate urban services especially the traffic, culture and sports amenities and activities. These will all contribute to increased visitor’s satisfaction.

Tour operators are important partners in the sector. Tourism is a highly organized and complex sector and requires specialization through division of roles and responsibilities. Tour operators are the major actors in marketing activities as well as directing the customers to different markets. Close cooperation with the tour operators and travel agencies is a must for successful promotion and marketing of the Region. For present day, it cannot be stated that the Region is marketed in an institutionalized manner. Most tourist arrivals to the Region are due to recommendations by friends. Future increase in the market share both domestically and internationally is also contingent upon the interest the tour operators will have in the Region. It is recommended that regional and local operators should be strengthened and that they should increase their marketing activities. Inclusion of the Region within the tour programs of domestic and international tour operators should be achieved. These entities should also enter into business partnerships. In this respect, utilization of the tourism potential in the neighboring provinces and countries and organizing tours that will include the Region as well as these provinces and countries will increase the international market share. In order to achieve these, the tour operators should be invited to the Region to discuss joint programs, international tourism fairs should be attended, the “regional image” should be made popular and utilization of e-tourism potentials should be realized.

Delineation of the Corridors for Tourism Development and supporting these is another strategic approach. These corridors for development should have priority in investments in order to increase the accessibility to the cultural and natural assets of the Region and to ease the installation and operation of necessary infrastructure and social amenities. The geographical distribution of the cultural and natural assets and the transportation system define these corridors. The coastal section of the Region can be reached via the state highway (numbered D 010) that is being converted (upgraded) into a divided highway. This route is one of the major development corridors (or axis) for tourism development. In order to define the corridors more realistically, the Coastal Corridor is sub-divided in 5 sub-corridors with respect to provincial boundaries. Other corridors for tourism development are aligned north – south. A total of 14 corridors are identified in the Region. There are 3 corridors in Ordu Province, 2 corridors in Giresun Province, 4 corridors in Trabzon Province, 3 corridors in Rize Province and 2 corridors in Artvin Province. The province of Gümüşhane, on the other hand, is within the South Tourism Corridor that originates from Trabzon. In accordance with the EU standards, the statistical units on the level of provinces will be defined as NUT 3 Regions. This will enhance and ease the measurement of success. In principle, tour routes are identified along these corridors. A minimum of 4 days is required to visit the corridors of each province in the Region as defined. Thus, the targeted

nights spent for each province is 4 nights and above. These routes and associated assets are displayed in the web site www.dokap.net both in English and in Turkish.

With the strategy for the Development of New Types of Tourism, decisions are given for those areas that have environmentally high sensitivity, that are not subject to mass tourism, and that are open to limited development under strict control. These new types are expected to be located in areas with difficult access, that are outside the major corridors and that are specific points. For example, plateau tourism or agricultural tourism that can be named as “green tourism” that binds the tourism and agricultural sectors show potential in specific locations within the Region. Another potential is the tourism related with sea and fishing that can take place within the fishermen’s wharfs and villages along the coast. Similarly, eco-tourism is recommended for those sections and areas with national parks and nature reservation areas and extreme sports activities in mountain slopes and peaks. It is recommended that accommodation facilities shall be located outside such preservation and protection zones. Accommodation needs should be met in nearby settlements by utilizing the existing traditional stock through improvements. Another new type of tourism is social or ethnographic tourism. This type of tourism enables interrelations between different cultures and is recommended for areas where local cultural values and traditional patterns are preserved. These new types of tourism can be a new source of employment and income for those segments of population that are relatively poor and live in the rural areas. This will enable the development of handicrafts and marketing of agricultural products on the site.

The relatively intensive structure of horizontal relationships within the sector requires input and support from many partners (stakeholders) in the tourism sector and from other sectors. There are differing roles and responsibilities ranging from those of the public sector partners to those of the individual.

5.2 Stakeholders and Responsibilities

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.

5.2.1 The 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.

5.2.1.1 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.

5.2.1.1.1 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.

5.2.1.1.2 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.

5.2.1.1.3 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. This Ministry is authorized to prepare and approve the preservation master and development plans for the different areas within the forests that have different preservation status and for the Special Environmental Preservation Zone of Uzungöl in Trabzon.

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.

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.

5.2.1.2 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.

5.2.1.2.1 Municipalities and Village Administrations

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. These functions are grouped below.

- i. Provision and management of urban infrastructure (intra-urban roads, infrastructure, solid waste, etc.)
- ii. Provision of intra-urban and neighboring areas transport (public transport systems)
- iii. Provision and supervision of urban amenities (social amenities, cultural centers, fair and exhibition areas, municipal museums, etc.)
- iv. Licensing and supervision of tourism facilities (facilities with municipal license)
- v. Construction and operation of tourism facilities (accommodation, food and beverage, beaches, etc.)
- vi. Measures with regard to public health and safety (supervising the hygienic conditions)
- vii. Supervision of food hygienist and safety
- viii. Urban service areas development (open and green spaces, sports areas, pedestrianized zones, etc.)
- ix. Planning and plan approval (preparation and approval of spatial (i.e. physical) development plans within the municipal boundaries)
- x. Supervision of construction (review and approval of plans and projects, issuing of construction and use permits)
- xi. Provision of urban safety and well-being (traffic safety, public safety and measures against natural disasters, etc.)
- xii. Price control and,
- xiii. Partial activities in promotion (printed and visual materials, organization of fairs, festivals, etc.)

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.

The function 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.

5.2.1.2.2 Special Provincial Administrations

Special Provincial Administrations are another type of local administrations, which invest in the tourism sector and support it with services they provide, which are therefore intertwined with the sector. Under the Law No. 3360, these administrations are charged with providing public works services, including road and bridge construction, to meet urban and rural needs at provincial level. Other duties of private provincial administrations are to make investments in agriculture, industry, commerce and other sectors for purposes of furthering the business life; develop tourism and make investments for this purpose; contribute to training services; develop cultural activities; make investments and provide services to raise the urban and rural life quality.

5.2.2 Private Sector

Private sector is the most dynamic and well organized stakeholder that has taken the responsibility of investment and operation part of tourism sector. The responsibilities of the private sector are as follows;

- i. Investment,
- ii. Operation,
- iii. Advertisement-Promotion,
- iv. Marketing,
- v. Partly development of educational and human resources.

At the present time, almost all the accommodation, food & beverage, resting-entertainment and similar facilities are established by the private sector. The facilities are also operated by the private sector.

The other activities related to the tourism sector are also materialized by the private sector.

5.2.3 Non- Governmental Organizations

Non- Governmental Organizations Civil Social Organizations, which are one of the most important partners, has a big importance in terms of directing and controlling functions. The sector partners are organized as associations, foundations and in similar ways.

The functions of the civil social organizations are the advertisement-promotion of the region, the increase of the market share, development of human resources and educational programs, increase of the understanding of tourism and environment, and the control of total quality management.

Civil Social Organizations make contributions to the issues apart from tourism sector; such as environment protection, development of urban living, increase of belonging feeling.

5.2.4 People of the Region

The people of the Region are the most important partner making great contributions to the sector, in terms of creation the image of the Eastern Black Sea Region, practicing and protecting the peculiar traditions and customs of the Region, providing visitor satisfaction. The support of the people of the region to the sector consists of traditional hospitality, adaptation of the sector, making investments and the control of the public opinion.

5.3 Institutional Development and Capacity Increase

The internal complexity and interrelationships with other sectors require a high level of organization and institutionalization within the sector. It is a necessity that the stakeholders within the sector shall be organized at different spatial levels with different legal status and with different subjects.

The resources for tourism are spatially distributed over several administrative boundaries and not necessarily confined within one administrative boundary. These require a comprehensive approach where different administrations should cooperate with each other in both infrastructure and amenities provision and in tourism development.

The second important issue is the requirement of an efficient and effective public – private sector partnership for appropriate development of tourism. This, in turn, requires relative institutionalization to be established.

5.3.1 Associations and Cooperatives

In different models, associations and cooperatives appear as the easiest way for improved organizational structures. This model is primarily proposed for local stakeholders in tourism development areas. Even though limited, examples of these are existing in the Region already. Furthermore, the local population has some experience with these associations and cooperatives as is the case with transport cooperatives.

Associations are proper forms of organization to follow the common interests of members, to represent them against third parties and for auto-supervision. Cooperatives, on the other hand, are useful in the procurement process of goods and services as well as in the process of market search, especially in boarding houses.

5.3.2 Establishing East Black Sea Region Local Tourism Development Administrations Union

An important step for the sector in the next term is the establishment of the East Black Sea Region Tourism Development Local Administrations Union 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 Municipal 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 and legal rights 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, and
- vii. Monitoring progress and assuming responsibilities in other similar issues.

The detailed terms of reference for the Union is given in the section 5.5 of this Report.

In this model, private sector and NGO 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.

5.3.2.1 Infrastructure and Tourism Development Local Governments Unions within Tourism Development Corridors

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.

5.3.3 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.

5.4 The Need for Education and Human Resources Development Programs

The complexity of the sector, its high level of institutionalization and sensitivity to outside effects necessitates trained manpower. This situation, in turn, requires formal and mass education programs to be developed and implemented.

5.4.1 Formal Education

Formal education is provided by higher and middle education institutions. The higher education institutions are:

- i. There are Faculties for Tourism and Commerce and Faculties of Tourism Management and others that are directly related to tourism as well as faculties such as Faculties for International Relations (Political Sciences) that are indirectly related.
- ii. On the other hand, there are 2 year Tourism Profession Higher Education Schools in various universities.

High school level education institutions are:

- i. Anadolu Tourism High Schools,
- ii. Cooking Profession High Schools,
- iii. Other professional high schools.

In the Region, Trabzon Tourism Profession Higher Education School is attached to the Karadeniz Technical University. In the future, similar schools attached to other universities such as Samsun 19 May University or Kars Kafkas University can be established. Similarly, middle educational schools are recommended for the Region as well.

5.4.2 Vocational Education

Vocational or informal education is critical for the sector. Informal education opportunities such as on the job training, know-how learning and training courses should be provided.

It is recommended that public agencies and NGO's shall organize these education and training programs.

The resources of the public sector in this respect are relatively abundant. In order for the sector to develop properly these resources and opportunities should be employed effectively. In this respect it is recommended that;

- i. The activities of the General Directorate of Tourism Education of the Ministry of Culture and Tourism and Tourism Education Centers (TUREM) shall be effectively organized in the provinces of the Region,
- ii. Local administrations shall organize courses for training in tourism. In this respect, such subjects as local traditional fabric production shall be included in these courses,
- iii. Program of Environmental Awareness organized by the Ministry of Environment and Forestry shall include aspects of tourism as well, especially green and eco-tourism aspects.
- iv. Similarly, courses organized by the Public Education Centers shall include subjects of tourism and handcrafts,
- v. Ministry of Agriculture and Rural Affairs shall organize courses on food technologies, milk and dairy products, meat and meat products and local textiles. Examples would be courses on famous Rize Cloth and Trabzon Cloth and their development and marketing.

It is recommended that vocational education programs shall be provided by the proposed Eastern Black Sea Union of Local Administrations for Tourism. A priority concern of the Union in this respect should be organizing pioneering and replicable programs for tourism development. Such programs with high levels of organization can be achieved only by powerful formal legal entities. The Union will thus also be effective in developing educational programs targeting the female population.

Another role of the Union will be in organizing programs targeting the education of the female population of the Region. "Society and Women Development Centers" to be established by the Union will ensure the increase in the roles of the female population in economic development of the Region as well as their contribution to the tourism sector.

¹³The subjects considered for these programs are;

- i. Home economy,
- ii. Tourism and societal relations,
- iii. Public health and child care,
- iv. Handcrafts, and
- v. Computer utilization and other similar subjects.

NGO's should also be involved in developing programs related with promotion and human resources development. In this respect, such NGOs as TURSAB (Turkish Union of Travel Agencies) are expected to be involved in sectorial education and training programs. These programs should also be supported by other regional and local institutions. Furthermore, through the programs to be organized by different NGOs such as local associations for the improvement of certain locations, musical associations, groups on folklore and folkloric dances, important results can be achieved for;

- i. The creation of the Regional Image,
- ii. Securing the continuation of the regional folklore, and
- iii. The production of local musical equipment.

Another requirement is the need for public sector to organize on the job training programs for their employees.

¹³ As an example; within the context of GAP Regional Development Project, a program conducted by GAP Regional Development authority and sponsored by International funding agencies. .

The private sector and the NGOs shall contribute (especially financial contribution) to all kinds of training and education programs geared for the successful development of the sector.

5.5 Action Plan in View of Strategies and Major Partners

Activities that must be undertaken by partners of different statuses to implement the proposals under this study are shown below, also considering the new institutional arrangements proposed.

5.5.1 The State Planning Organization

For the plan to find chances for implementation, the policies and strategies envisaged under the study as well as investments, in association with them, must be included in Development Plans and Annual Investment Plans. Being a public agency, the State Planning Organization is charged with and authorized to do this, with contributions primarily from the Ministry of Culture and Tourism and from other relevant agencies.

5.5.2 The Ministry of Culture and Tourism

The Ministry of Culture and Tourism is a central administrative entity to ensure the implementation of the policies and strategies envisaged for the development of tourism sector in the East Black Sea Region, and manage, guide and supervise the Plan realization. In this context, it is expected to turn the proposals to investment programs, issue the statutory regulations necessary for the success of implementation, prepare recommendations to the private sector in line with the basic proposals under the Plan and guide that sector. In relation to implementation, the major areas of action under the jurisdiction of the Ministry of Culture and Tourism are as follows:

- i. The support of the types of tourism proposed by the Plan and the encouragement of the new types of tourism, including particularly rural and green tourism, eco-tourism, etc under the Tourism Encouragement Law No. 2634.
- ii. The support of Regional and local travel agencies; the encouragement of them for cooperation with national and international travel agencies; and the issue of changes to the Law No. 1618 on Travel Agencies and the Association of Travel Agencies.
- iii. The promotion of the Region, including in this context the provision of contributions to the development of an image of the East Black Sea Region and the promotion of the Region at national and international fairs.
- iv. The preparation and approval of physical development plans for zones located in the tourism development corridors of the Region as well as other zones which remain outside that corridor but which are important and proclaimed a tourism center.
- v. The preparation or the provision of contribution to the preparation of management plans for the tourism development corridors and, under this planning, the consideration of the infrastructure, financing, and organization and human resources aspects of the area as well, without limiting the efforts exclusively to physical planning.
- vi. The expansion of Tourism Information Offices subordinate to the Ministry and the establishment of information offices or desks particularly at major customs gates in the Region such as Trabzon Airport and Sarp Gate, through which foreigners enter Turkey.
- vii. The taking of incentive measures to acquire historic individual structures for the sector.

5.5.3 Other Central Administrative Agencies

For the development of tourism in the Region, other central administrative agencies will continue to fulfill their obligations such as Regional transport, power supply and other basic

utility services mentioned in section 5.2.1.1.3 of the Report. Activities such as the re-organization of fishermen's shelters also as yacht berths, the construction of passenger terminals at ports or the improvement of already existing ones should be accomplished by the Ministry of Transportation. With these contributions, both the new types of tourism and the cruiser tourism, which promises a potential for the Region will develop. It is also proposed that the issue of using Batum Airport should be considered by relevant agencies, including primarily the Ministry of Foreign Affairs and the Ministry of Transportation.

In addition, it is expected that the planning activities for the Long-Run Development Plans and Management Plans being continued by the Ministry of Environment and Forests on areas of different preservation statuses will have been concluded in the coming period. In this context, the elaboration and conclusion of a plan for Uzungöl, Trabzon, which has been proclaimed a Special Environmental Preserve, is specifically urgent.

Furthermore, investments by İllerbank (the bank of Provinces) for urban infrastructure will be continuing.

5.5.4 Local Administrations

Local administrations will be providing large contributions to the sectorial development in the coming period, too. These contributions will go to the construction and management of transportation facilities, infrastructure and amenities in urban and rural zones. In addition, their powers and responsibilities will further increase with the entry into force of new statutory regulations for public management and local administrations.

5.5.4.1 Municipalities and Village Administrations

In urban settlements, municipalities will continue with their current obligations and will have increased duties in line with new statutory regulations. Contributions by municipalities to the sectorial development will be the following:

- i. Providing publicity services, including e-publicity of settlements, and establishing local information offices.
- ii. Using the image of the East Black Sea Region in local activities.
- iii. Urging the organization and promotion of locality-specific festivals.
- iv. Urging participation at fairs in the name of localities.
- v. Providing and managing transport facilities and utility services.
- vi. Improving environmental conditions to ensure a hygienic environment.
- vii. Taking all measures relating to general health.
- viii. Ensuring food safety and control.
- ix. Providing and managing urban amenities, arrangement of urban areas, and development of pedestrian and commercial zones.
- x. Inspecting the service supply quality of tourism facilities, accommodation, eating/drinking and recreation facilities.
- xi. Providing contribution to the establishment of Unions of Local Administrations for Tourism and Infrastructure Development.
- xii. Undertaking planning activities at appropriate scales for investments directed towards healthy urban development and tourism and controlling urbanization.
- xiii. Regarding the supply of transport facilities, infrastructure and amenities, granting priority to development areas of new types.

Villages will gain further importance due to their large potentials particularly for green tourism and eco-tourism. Considering the financial structure and inadequate human resources of village administrations, they must be provided with assistance by Private Provincial Administrations as well as all other sectors in fulfilling their statutory obligations.

In this context, contributions to be provided by the proposed Union of Local Administrations for the East Black Sea Region Infrastructure and Tourism Development will be vitally important.

All relevant units must contribute to villages in making necessary investments and taking necessary measures in rural settlements, primarily including the following:

- i. Provide with road and appropriate infrastructure system.
- ii. Provide areas having a high potential for tourism development with necessary and appropriate amenities for communication, security and health services.
- iii. Undertake environmental arrangement and mark necessary trek routes.
- iv. Improve rural dwelling units and develop a hygienic environment.
- v. Prepare development plans for areas in need of them.
- vi. Provide construction checking for planned areas.

5.5.4.2 Special Provincial Administrations

It is envisaged that, in the coming period, special provincial administrations will contribute more to the sartorial development within the framework of new statutory regulations. It is thought that such contribution will be to the development of infrastructure, including primarily the rural roads, and to the provision of educational services and the raising of the rural life quality level.

In this context, private provincial administrations will have the following basic obligations:

- i. Development of rural roads in areas of the development of new types of tourism.
- ii. Contribution to the supply of infrastructure to rural settlements.
- iii. Development of facilities in areas of the development of new types of tourism jointly with the private sector.
- iv. Contribution to awareness-raising and training programs to be held on tourism and environmental issues.

5.5.5 East Black Sea Region Tourism Development Local Administrations Union and Other Unions

The Union is expected to provide the most important contribution to the development of tourism sector in the Region. In this context, the Union is proposed to undertake the following obligations:

- i. Prepare, manage, monitor and guide Regional and local tourism development programs.
- ii. Find joint solutions on the joint supply and management of infrastructure (transport, supply of joint infrastructure network, wastewater treatment and solid waste management).
- iii. Contribute to the promotion of and the creation of an image for the Region.
- iv. Identification of tour routes in the Region.
- v. Establish relationships with marketing companies and tour operators, invite tour operators to the Region to contribute to the promotion and marketing of it.
- vi. Ensure the installation and management of joint amenities on development corridors and tour routes.
- vii. Provide Tourism Development Plans.
- viii. Provide Site Management Plans.
- ix. Form business companies with the private sector or become a partner in already existing ones to provide tourism services.

5.5.6 Private Sector

The private sector will be the most important and the most enterprising partner in ensuring the sectorial development. In this context,

- i. Investment,
- ii. Management,
- iii. Promotion,
- iv. Marketing,
- v. Training and human resources development activities

In all sub-types of the sector will be carried out largely by the private sector.

In the coming period, the private sector should also provide contributions to infrastructure installation and management activities. The private sector must contribute to costs of service supply as well as undertake infrastructure investments, including almost all in-site investments in particular.

The private sector's involvement in cooperation with the public sector and forming partnerships with it for certain purposes are prerequisites for the sectorial development. Specifically, the East Black Sea Region Union for Infrastructure and Tourism is proposed to form investment and management partnerships.

5.5.7 Non-Governmental Organizations

Non-governmental organizations must be one of the most important partners of the development of Regional tourism in the coming period. Civilian initiatives to be organized by both the tourism sector partners and other people, including principally those who care about environmental problems, will be carrying out their monitoring and control functions above all. With the new statutory regulations, the activities of such organizations will become more effective within the framework of a management model.

Non-governmental organizations are expected to carry out more concrete activities such as the promotion of the Region, increase of the market share, development of human resources, organization of training programs, awareness-raising on tourism and environment and total quality control, etc, and such activities will further increase in the coming period.

5.5.8 People of the Region

The adoption of the sector by the Regional people is a prerequisite for development. In this context, the Regional people are expected to support attempts by local administrations and non-governmental organizations to preserve tourism and environment, contribute to arrangements for facilitating the rural life, support new enterprises in a feeling of belongingness and take behaviors to raise visitor satisfaction.

The preservation of the Regional cultural assets and folkloric features and the use of them for creating an image of the Region will be an obligation of the Regional public.

5.5.9 Goal Achievement Matrix

Considering the duties and obligations of partners of different statuses defined above and the strategies proposed under this study, a "Goal Achievement Matrix" emerges, as exhibited below in tabulated form.

6. 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.

6.1 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.

6.2 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.

Plan of Actions – Goal Achievement Matrix

| Strategies | Public Sector | | | Private Sector (4) | Non-Governmental Organizations (5) | Regional People (6) |
|---|---|---|--|---|--|---|
| | Central Administration (1) | Local Administrations (2) | East Black Sea Region Tourism Development Local Administrations Union and Other Unions (3) | | | |
| Create an Image of East Black Sea Region (Strategy 1) | <ul style="list-style-type: none"> Process the image of East Black Sea Region on national & regional publicity programs Conduct and publish scientific research on the Region | <ul style="list-style-type: none"> Process the image of East Black Sea Region in local activities Ensure the organization and promotion of festivals | <ul style="list-style-type: none"> Process the image of East Black Sea Region in local activities Utilize e-tourism possibilities | <ul style="list-style-type: none"> Highlight and use the image of East Black Sea Region in all publicity, marketing and service supply actions Utilize e-tourism possibilities | <ul style="list-style-type: none"> Provide support to organization and promotion of festivals Utilize e-communication and development possibilities in their own area of interest for promotion Cooperate with similar overseas NGO's | <ul style="list-style-type: none"> Preserve traditional assets of the Region and offer tolerance and hospitality Present documents to facilitate image creation |
| Raise Visitor Satisfaction (Strategy 2) | <ul style="list-style-type: none"> Carry out Regional promotion & information activities Inspect facility and service supply quality | <ul style="list-style-type: none"> Carry out local promotion and information activities Supply & manage well transport and infrastructure facilities Supply & manage well amenities Inspect facility and service supply quality | <ul style="list-style-type: none"> Carry out Regional promotion and information activities Supply and manage infrastructure Supply and manage amenities | <ul style="list-style-type: none"> Carry out local promotion and information activities Contribute to supply and well management of infrastructure Contribute to supply and well management of appropriate amenities | <ul style="list-style-type: none"> Inspect and guide local facility and service supply 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 |
| Raise Cooperation with Tour Operators and Solidarity among Sector Partners (Strategy 3) | <ul style="list-style-type: none"> Provide welcoming environment, issue statutory regulations and take incentive measures for foreign entrepreneurs Participate in fairs | <ul style="list-style-type: none"> Participate in fairs Undertake the promotion of settlements | <ul style="list-style-type: none"> Support activities by foreign operators Participate in fairs | <ul style="list-style-type: none"> Form joint ventures with foreign operators Participate in fairs | <ul style="list-style-type: none"> Cooperate with similar overseas NGO's | <ul style="list-style-type: none"> Contribute to programs of tour operators in a feeling of belongingness |

(1) Central governmental agencies and their country organizations.

(2) Municipalities, village administrations and special provincial administrations located in areas proposed for development.

(3) Unions for infrastructure and tourism development to be formed by regional local administrations (Municipalities, village Administrations and Special Provincial Administrations).

(4) Artificial and natural persons and independent professionals operating in tourism under the Turkish Commercial Code.

(5) Non-profit entities such as societies, foundations, vocational associations etc organized on voluntary basis.

(6) Inhabitants of urban and rural settlements

Plan of Actions – Goal Achievement Matrix

| Strategies | Public Sector | | | Private Sector (4) | Non-Governmental Organizations (5) | Regional People (6) |
|--|---|---|---|---|--|--|
| | Central Administration (1) | Local Administrations (2) | East Black Sea Region Tourism Development Local Administrations Union and Other Unions (3) | | | |
| Create Tourism Development Corridors (Strategy 4) | <ul style="list-style-type: none"> • Construct Regional transport and infrastructure systems • Undertake and approve appropriately scaled planning (Ministry of Public Works and Settlement) • Form Unions of Local Administrations for Tourism and Infrastructure Development | <ul style="list-style-type: none"> • Supply and manage adequate infrastructure • Supply and manage adequate amenities • Contribute to product diversifying activities • Form or become a member to Unions of Local Administrations for Tourism and Infrastructure Development • Undertake Master and Development Plans | <ul style="list-style-type: none"> • Supply and manage adequate infrastructure • Supply and manage adequate amenities • Contribute to product diversifying activities • Undertake structural and Site Management Plans | <ul style="list-style-type: none"> • Make highly feasible investments at necessary scale • If necessary, form companies with public sector on infrastructure and tourism management • Make investments for facility development and service supply | <ul style="list-style-type: none"> • Cooperate with NGO's of settlements located on the corridor • Organize vocational development programs on environmental and tourism issues, emphasizing women | <ul style="list-style-type: none"> • Provide support to association and civilian initiative formation actions • Participate in training programs |
| Create New Types of Tourism (Strategy 5) | <ul style="list-style-type: none"> • Construct sub-Regional transport and infrastructure facilities • Undertake and approve appropriately scaled planning (Ministry of Public Works and Settlement) • Prepare Site Management Plans (Ministry of Environment and Forests) | <ul style="list-style-type: none"> • Construct and manage adequate local transport and infrastructure facilities • Give priority to development areas of new types in supply of transport and infrastructure • Undertake Master and Development Plans | <ul style="list-style-type: none"> • Construct and manage adequate local transport and infrastructure facilities • Give priority to development areas of new types in supply of transport and infrastructure facilities • Undertake structural and Site Management Plans | <ul style="list-style-type: none"> • Contribute to construction and management of appropriate local transport and infrastructure facilities • Make investments suitable for development of new types of tourism, that represent local features; develop home boarding business; construct and manage other facilities | <ul style="list-style-type: none"> • Organize public motivation programs • Organize training and vocational development programs on environment and tourism, emphasizing women • Contribute to Site Management Planning efforts | <ul style="list-style-type: none"> • Provide support to association and civilian initiative formation actions • Participate in training programs |

(1) Central governmental agencies and their country organizations.

(2) Municipalities, village administrations and special provincial administrations located in areas proposed for development.

(3) Unions for infrastructure and tourism development to be formed by regional local administrations (Municipalities, village Administrations and Special Provincial Administrations).

(4) Artificial and natural persons and independent professionals operating in tourism under the Turkish Commercial Code.

(5) Non-profit entities such as societies, foundations, vocational associations etc organized on voluntary basis.

(6) Inhabitants of urban and rural settlements.