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"Mediterranean Tourism policy and the socioeconomic impacts in the Mediterranean countries (especially) after the Arab Spring-the case of Tunisia"

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ΥΠΕΥΘΥΝΗ ΔΗΛΩΣΗ

1. Δηλώνω ρητά και ανεπιφύλακτα ότι η διπλωματική εργασία που σας καταθέτω αποτελεί προϊόν δικής μου πνευματικής προσπάθειας, δεν παραβιάζει τα δικαιώματα τρίτων μερών και ακολουθεί τα διεθνώς αναγνωρισμένα πρότυπα επιστημονικής συγγραφής, τηρώντας πιστά την ακαδημαϊκή δεοντολογία.
2. Οι απόψεις που εκφράζονται αποτελούν αποκλειστικά ευθύνη του/ης συγγραφέα/ως και η επιβλέπουσα, οι εξεταστές, το Τμήμα και το Πανεπιστήμιο Πελοποννήσου δεν υιοθετούν κατ' ανάγκη τις εκφραζόμενες απόψεις ούτε φέρουν οποιαδήποτε ευθύνη για τυχόν λάθη και παραλείψεις.

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The Mediterranean itself as an aquatic mosaic of places consisted of fascinating cultures has been my source of inspiration and I am very pleased to have been given the encouragement by my supervisor professor, Dr Lila Leontidou to explore such an interesting subject as tourism which still nowadays remains the comparative advantage of my country, Greece.

The important for me, was the trip...
Have a good reading.

Την παρούσα εργασία θα ήθελα να την αφιερώσω σε όλους τους δικούς μου ανθρώπους οι οποίοι με στήριξαν σε αυτή την φετινή μου προσπάθεια.
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Σημασία για μένα είχε το ταξίδι…
Καλή ανάγνωση.

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LIST OF ABBREVIATIONS

1. **UNTWO**: United Nations World Tourism Organization
2. **WTTC:** World Travel and Tourism Council
3. **UNESCO**: United Nations Educational, Scientific and Cultural Organization
4. **ILO**: International labour Organization
5. **MENA**: Middle-East North Africa (countries)
6. **SMC:** South Mediterranean Countries
7. **SEMC**: Southern and Eastern Mediterranean Countries
8. **OECD**: Organization for Economic Cooperation and Development
9. **GNI:** Gross National Income
10. **GDP:** Gross Domestic Product
11. **TND:** Tunisian Dinar

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Abstract

The aim of the research of the current dissertation is to describe the trends of Mediterranean Tourism policy and specify the socioeconomic impacts on Mediterranean countries after the outbreak of the Arab spring, focusing on the case of Tunisia where the Arab Spring's movement had started.

Examining the impacts in the economy of the country, mainly in society and also the potential for facing youth unemployment which is the most painful issue for the economies, especially in the MENA region.

In the first chapters, there will be an attempt to present some useful information around Tourism and give the background situation before the Arab Spring regarding tourism policy in the Mediterranean region.

In the following chapters, there will be an effort of mapping the situation of Tourism in South Eastern Mediterranean countries (not only EU countries), before and after the Arab Spring and its repercussions to the countries. (Loss of Tourism, reduction of arrivals, fear of Jihadist attacks, insecurity, trends).

To conclude, there are some considerations regarding Tourism policy activating institutional tools as well as some proposals for restoring the familiarization of the Westerns with the South East Mediterranean, as a preferable exotic tourist destination.

Key words: Mediterranean countries, Tourism, Tourism's indicators, Arab Spring, socioeconomic impacts, security, Tunisia, Tourism perspective.

Introduction

During the years, the constant mobility of people for tourism purposes makes Tourism a driving force in the field of economic development globally, contributing to the GDP growth of a country but also bringing highly important consequences in a population' welfare level.

In this work we refer to the Mediterranean countries, broadly known as the countries bordered by the Mediterranean Sea and bounded by three different continents: Europe, Africa and Asia. More specifically, Mediterranean countries are considered to be those bordering the Mediterranean, which starts from Gibraltar and extends to the Aegean Sea (Pierret, 2012).

On the European side, the countries are: Spain, South France, Italy, Malta, Greece, Slovenia, Croatia, Bosnia-Herzegovina, Montenegro, Albania and Cyprus. On the Asian side, the countries bordering the Mediterranean are Turkey, Syria, Lebanon, Israel and Palestine. Last, from the African continent, the countries are Morocco, Algeria, Tunisia, Libya and Egypt.

In the question *what is the Mediterranean?* The answer comes from F. Braudel: "Mediterranean is a thousand things at once. Not one landscape, but landscapes without number. Not one sea, but a succession of seas. Not one civilization, but a number of civilizations, superimposed one on top of the other. To travel in the Mediterranean region is to find the Roman world in Lebanon, prehistory in Sardinia, Greek cities in Sicily, the Arab presences in Spain and Turkish Islam in Yugoslavia"(Braudel,1985,p.4).

The Mediterranean region comprises **four major groups of countries**, classified on a socioeconomic basis, development and political stability (Apostolopoulos et al. 2001, p.4). [In order to facilitate the reader, these four (4) groups are depicted in the table below (p.5)].

In this concrete field, we are going to examine not only applied Tourism Policy but also the socioeconomic impacts in the Mediterranean countries especially after the Arab Spring, taking into consideration the most important challenges that Mediterranean basin faces.

Since January 2011when the whole Mediterranean region lives in upheaval, involved in civil wars like the cases of Libya and Syria, resource securitization (by France an

UK in Libya), continued protests and concerns about human rights (Tunisia, Egypt), economic turmoil and debt crises (declining income in Israel, Greece, Spain), treatment of minorities by Islamist party majorities (Egypt, Palestine), (Bauer and Bauer, 2017, pp.9-10), as well as extreme Islamist attacks and terrorism phenomena creating insecure circumstances for the population but also for all the Mediterranean region.

i) **<u>Classification of Mediterranean Countries</u>**

Source: Apostolopoulos et al. 2001, p.4
*(*The table is based on the classification concept of the book)*

<table>
<tr><th colspan="2">1st Group</th><th>2nd Group</th><th>3rd Group</th><th>4th Group</th></tr>
<tr><td colspan="2">-Socioeconomically advanced
-political stable democracies
(mainly European countries)</td><td>-diverse types of political regimes (authoritarian)
-serious structural socioeconomic problems
-religious problems/ethnic tensions
-rich natural resources</td><td>-western orientation
-budget deficits
-rising external debt
Socioeconomic polarization</td><td>Adriatic coast of the Balkans
(includes also new established states)</td></tr>
<tr><td colspan="2">France</td><td>Algeria</td><td rowspan="7">The unique case of Turkey</td><td>Republic of Albania</td></tr>
<tr><td colspan="2">Greece</td><td>Egypt</td><td>Bosnia-Herzegovina</td></tr>
<tr><td colspan="2">Italy</td><td>Lebanon</td><td>Croatia</td></tr>
<tr><td colspan="2">Spain</td><td>Libya</td><td>Slovenia</td></tr>
<tr><td rowspan="3">Cyprus
Malta
Israel</td><td rowspan="3">Former colonies or newly established states</td><td>Morocco</td><td>FYROM</td></tr>
<tr><td>Syria</td><td>Serbia</td></tr>
<tr><td>Tunisia</td><td>Montenegro</td></tr>
</table>

Methodology

The research method applied in the present dissertation is analysis of recorded material mainly based on a combination of primary and secondary sources. No field work or interviewing was conducted.

More specifically, the main sources for the comprehensive examination of the issue and the successful completion of this work were: books that are purely focused on Mediterranean tourism with tourist and economic content, papers and updated scientific articles regarding the problematization about Mediterranean Tourism and the Mediterranean basin as a whole after the Arab Spring, published by distinguished writers of the scientific community, researches published by global economic organizations, references from the Greek Ministry of Tourism and other public organizations as well as governmental documents derived from the Permanent Greek Delegation in the European Union.(Brussels) or European Union's documents.

1 SPEAKING ABOUT TOURISM POLICY

In general, in the global tourism market a destination is mainly associated with a unique tourist product (eg. the sea) or exclusively with a specific type of tourism (ex. alternative tourism). Regarding Mediterranean countries, their main features are focused on the **so-called 3s (sea, sun, sand),** (Bramwell, 2004, p.18.)**,** their seaside wealth and their cultural heritage with a high degree of seasonality, especially during the summer season. Also, researchers have presented innumerable different segmentations based on socioeconomic, psychographic and other factors (Valene, Smith, 1995, p. 21).

During the years, Mediterranean tourism is changing and policy-makers need to ease policies (Lanquar, 2013, ii) that restrict travel and mobility in general, because in this way foreign direct investment in tourism is discouraged and limit even SMCs' integration with Europe and the rest of the world. It could be claimed that the vision of the Mediterranean market must go beyond the intercontinental alone, particularly the European outbound market, and take into account domestic and interregional (international, mainly Arab and emerging countries) tourism, which has very promising prospects (ibid).

On the one hand, a strong development tool for a country's economy could be **a**) an investment policy in tourism infrastructure and on the other hand such a policy goes without saying with **b**) the appropriate democratic process in the southern rim of the Mediterranean which could even bring a high potential of a strong Euromediterranean partnership among different states of the basin.

But what makes Mediterranean Sea a highly challenging field for applying Tourism Policy in European and non-European Mediterranean countries for attracting people from all over the world? In order to deal with this question we have to bear in mind that the **diversification** of the tourist product is the major challenge for the Mediterranean countries as these countries have similar tourist advantages and often try to compete with each other by showing a differentiated image or by strongly promoting their (particular) local characteristics.

1.1 Tourism useful terms and classifications

For reasons of brevity in the framework of the present master thesis, we will use the definition of Tourism as an economic and social phenomenon given by the World Tourism Organization (UNWTO) and defines *Tourism as the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited.*

Tourism also includes the sum total of industries such as the construction and infrastructures, transportation, accommodation, food and beverage services, recreation and entertainment, travel agencies or tour operators and a large number of handicrafts activities, culture and heritage (Lanquar, 2011,p.9).

Modern tourism is closely linked to development and encompasses growing number of new destinations so these different dynamics made Tourism a key driver for socioeconomic progress.

In a more conceptual and contemporary term we should refer also the definition of "**Sustainable Tourism**" that is be defined as: "Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities”[1].

Today, the United Nations World Tourism Organization (UNWTO) in its vision statement has predicted global annual tourism expenditure to hit US$ 2 trillion (i.e., US$ 5 billion per day) and the number of foreign tourists to reach 1.5 billion by 2020 (Alsarayreh et. al. 2010).

To examine a tourism analysis we need some additional components such as the **tourism** characteristics **activities** that produce **tourism characteristic products.**
The Tourism Industry represents the grouping of those establishments whose main activity is the same tourism characteristic activity (OECD, 2016, p.13).
For a further clarification, it would be useful to consult the table below.

Table 1.1.

Tourism characteristics: Products & Activities

Source: OECD Report, Tourism Trends and Policies (2016)

Tourism characteristic consumption products	Activities (tourism industries)
Accommodation services for visitors	Accommodation for visitors
Food and beverage serving services	Food and beverage serving activities
Railway passenger transport services	Railway passenger transport
Road passenger transport services	Road passenger transport
Water passenger transport services	Water passenger transport
Air passenger transport services	Air passenger transport
Transport equipment rental services	Transport equipment rental
Travel agencies and other reservation services	Travel agencies and other reservation services activities
Cultural services	Cultural activities
Sports and recreational services	Sports and recreational activities
Country-specific tourism characteristic goods	Retail trade of country-specific tourism characteristic goods
Country-specific tourism characteristic services	Other country-specific tourism characteristic activities

Through the years tourism had experienced deepening diversification[2] to become one of the fastest growing economic sectors in the world. This growth goes hand in hand with an increasing diversification and competition among different destinations and the spread of tourism in industrialized and developed states has produced economic and employment benefits in many related sectors including construction to agriculture or telecommunication[3].
Speaking about diversification of tourism we should take in consideration that there are different types of tourism including forms of alternative tourism as a new trend of

[1] http://www2.unwto.org/content/about-us-5.
[2] http://www2.unwto.org/content/why-tourism.
[3] ibid.

tourism which attract tourists with special interests and it is appropriate to include a brief description such as the following:

i. **Wellness tourism** is associated with visits to tourist sites for the treatment of various diseases (eg. treatment of anxiety, psychotherapy, physiotherapy, relaxation, nutrition, beauty, etc.), as well as relaxation and rejuvenation of the body and soul. (Linardatou, 2008, pp. 13-16).
ii. A similar type is **Health tourism**, considered as "the organized travel outside one's local environment for the maintenance, enhancement or restoration of an individual's wellbeing in mind and body". A subset of this is **medical tourism**, which is "the organized travel outside one's natural healthcare jurisdiction for the enhancement or restoration of the individual's health through medical intervention (Carrera & Bridges, 2006, p. 447).
iii. **Conference Tourism** is directly linked to the organization and participation in conferences, seminars and exhibitions. In recent years, conference tourism has grown rapidly and is an important part of the tourism market at an international level.
iv. **Sports tourism** includes all forms of active and passive participation in sporting events. Participation can be random or even organized; can be done for business purposes or for other reasons. It is divided into two categories:

    a) Active participation in sports events or competitions such as golf, tennis, football, basketball, rowing, etc. b)Watching European and world cups and championships, the Olympic Games and major international tournaments (ibid).
v. **Ecotourism** - a form of tourism that has been developed using environmental resources: mountains, lakes, lagoons, valleys, caves, rich flora and fauna. To sum up, there are areas of high geological interest (Linardatou, 2008, pp. 13-16).
vi. **Cultural Tourism** is referred to an ideal form of tourism for those who wish to discover and learn about the culture and culture of different regions, take active part in seminars and workshops, as well as knowledge of traditional art - painting, photography, pottery, sculptures, frescoes, Musical instruments, etc (ibid).
vii. **Exhibition Tourism** is usually considered as part of business tourism (M. Law, 1987, pp. 85-95) related to large scale exhibitions of products or services. Through the years has received an increasing attention. In this context, is important to refer that the Mediterranean International Tourism Exhibition

(MITE)[4] is one of the most promising mega events in the tourism industry taking place in Greece. Exhibitors, buyers and visitors who are interested in the global tourism trade take part and also the exhibition is used as a platform to meet and negotiate with new customers. The exhibitors are categorized into different sectors of the tourism industry.

viii. **Religious tourism**, is a type of tourism exclusively or strongly motivated for religious reasons. Religious tourism can be differentiated into various forms. The short-term religious tourism is distinguished by excursions to nearby pilgrimage centers or religious conferences. The long-term describes visits of several days or weeks to national and international pilgrimage sites or conferences (Rinschede, 1992, pp. 51). Organizational forms of religious tourism can be distinguished by definitive characteristics such as number of participants, choice of transport, seasonal travel, and social structure.

The significance of cultural and religious values is becoming more apparent in this century than previously, given the fact of the Arab spring wave and the on-going Syrian war.

All these spectacular development of new forms of tourism and services seems to need a re-examination of the "homogenous brand identity of the Mediterranean" (Lanquar, 2013, p.5.).

1.2 Preconditions and variables in tourism development: Mediterranean examples

In a constantly changing environment, taking into consideration the current geopolitical situation in the Mediterranean, starting from the Arab Spring and the political changes in the regimes mainly in countries of North Africa, the on-going war in Syria as well as the huge wave of refugees and the struggle of European and non-European Institutions or NGOs to manage the refugee crisis, it is considered as necessary to present the most significant factors that influence the tourist product. World tourism is increasingly affected by forces and events in its external environment, so that even small-scale crises may have a "considerable impact" on a destination (Alvarez, and Campo, 2014, p. 70).

As a result Tourism is a highly vulnerable industry and is particularly sensitive to exogenous factors (Seddighi, Nuttall and Theocharous, 2001 p.1.).

[4] https://mite.gr/en/.

In the socio-economic approach[5] the **disposable income** is people's income at their disposal that can either consume (or save). Moreover, the **Gross National Income (GNI)** defined as the sum of value added by all producers who are residents in a nation, plus any product taxes (minus subsidies) not included in output, plus income received from abroad such as employee compensation and property income[6], can be considered a defining factor for Tourism potential.

Transport network is also a variable influencing the mobility of people for tourism purpose. Also, the route frequency, the transit means or the distance of a tourist destination contributes to the demand of a tourist product. The general price level of a country-destination and **the cost of living** is also an important criterion for the tourist movement. It goes without saying that tourist infrastructures and the quality of services play a significant role for a destination in order to become desirable.

Political stability is one of the crucial factors acting as a barometer for tourism demand. In general, a successful tourism industry needs political stability, peace, security and the potential of intercultural dialogue between groups of people without mental or physical restrictions (Al-Hamarneh, 2005, p. 30).

The lack of stability, meaning the political instability may cause disastrous effects for international tourist arrivals, as was evidenced by the events of 2011 in North Africa and Middle East (Lanquar, 2013, p.10). The extent and magnitude of political instability are determinant factors for the image of destinations in tourist countries and the perceived stability and safety of a particular destination in the eyes of prospective holidaymakers (Seddighi, Nuttall and Theocharous, 2001, p.183).

Table 1.2.1

Source: Seddighi, H. R., Nuttall, M. W. and Theocharous, A. L. (2001

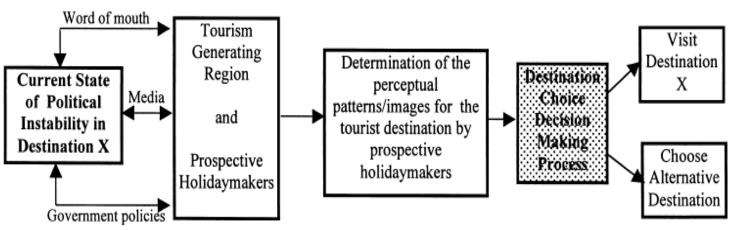


Fig. 1. Political instability and perceptual pattern determination.

[5] Hellenic Chamber of Hotels, http://www.grhotels.gr/EN/Pages/default.aspx.
[6] http://www.investopedia.com/terms/g/gross-national-income-gni.asp.

Nevertheless, each type of political instability is considered to have different impact from other type (ibid, p.9). On the way of solving negative impacts, **intercultural dialogue** is considered as the only way to prevent negative and violent developments from tourism (Al-Hamarneh, 2005, p. 32).

To go a step further, for a country facing strong political changes like the civil upheavals during the Arab Spring in the NA region and also the relative variable of **international evolutions** or interactive conflicts between states like the paradigm of the Greek-Turkish dispute (as well as Cyprus issue), may threaten not only a tourism destination, already suffering from internal problems but also hurt neighboring countries that rely upon tourism to contribute to their economies (Clements,1998,p. 283).

The **image** is also an essential component within the process of choosing a holiday destination among different tourist destinations. At the same time, it influences the tourist's decisional process. (Albu, 2016, p.4).

A well-known case is Israel, bringing a "bad image" because of the Palestine issue or the conflict of the recent past with Turkey (Mavi Marmara, 2010). Israel has problematic public image that affects both its tourism industry and its standing in terms of international relations (Avraham, 2009).

When consumers experience the so-called feeling of "animosity" (ibid, p.72) towards a particular country because of past or current events, they refuse to buy products of this place or visit it. Furthermore, data obtained before the occurrence of the event show that for countries with a bad image, the country image is composed mainly of feelings and emotions (affective image) which have a strong and significant relationship with the overall country image (ibid).

Another crucial factor which should be mentioned is also **economic interests, relations or geopolitics among different states** (Mediterranean).

It is quite interesting to see how these factors can influence or shape tourism policy of the countries. Let's see the example between Israel & Greece, in 2010 when Tel Aviv was looking at gas fields in the Eastern Mediterranean. The "Leviathan" natural gas field in the maritime area between Cyprus and Israel was much larger than the "Tamar Peninsula", discovered in 2009 south of Lebanese territorial waters which constituted a controversial zone between Lebanon, Israel and later expanded into the waters of Cyprus. The position of Greece played a significant role as Israel proposed to the

Greek government to act as a hub for the transport of natural gas in Europe. Back then, the extraction of natural gas was launched in 2011 (Karagiorgi, 2011, p.3).

As a result, Greece from its part, asked for financial support from Israel **through the influx of Israeli tourists,** and 250,000 Israeli tourists visited Greece this year, or **200% more** than in the previous year. Israel back then, was committed to doubling the number of tourists each year (ibid).

Another special factor is the sense of **security.** "Security is ubiquitous to describe military, economic, ecological, and humanitarian issues involving individuals, societies, and states" (Bauer, 2017, p.2). It encompasses threats, vulnerabilities, and risks related to national, regional, international, and global dimensions.

In particular, the vulnerability of a country facing a **terrorist attack** like the recent case of France (Paris, 2015) is definitely a deterrent for tourists. What happened was a worry about the impact on sentiment affecting consumer spending and corporate investments (Cambridge Risk Analysis, 2016, pp. 1–11). The so-called '**fear factor'** that dampen confidence and decrease spending. Secondly, the markets immediately were concerned about how the attacks might affect the Tourism and leisure sectors over the medium term[7]. Such localized shocks made French the economy suffer- both supply and demand side (shocks)-as a result of the attack (ibid).

Paris, was and still remains a top destination for millions of global travelers, approximately 85 million visitors a year and these terrorist phenomena have serious negative consequences on market confidence. According to a Risk Analysis held by the University of Cambridge (ibid, p.8) about a loss of $12.5 billion for the French economy and a loss about $21.8 billion to the global economy was estimated in total. More specifically, Tourism for France accounts for 7 percent of the country's GNP, (Gross National Product), with the City of Paris and the Île-de-France region, being the most important economic centre of activity in France, accounting for 30 percent of the French GDP (Gross Domestic Product). Following a wave of further terrorist attacks, 2016 has been a year of severe economic losses for the country. Paris has seen a **€750 million loss in tourism** (ibid, p.8) revenue over the last year, according to the Paris region tourist board.

Another case we cannot disregard are the recent extreme Islamist attacks (2015&2017) in places like Palmira in Syria. Where ISIS destroyed the Tetra Pylon

and part of the Roman Theater[8], one of the most magnificent ancient monuments of cultural heritage since the Phoenicians protected by UNESCO.
An important historical site, well preserved through the years, a symbolic monument but also a famous sight-seeing for tourists was ruined and that as a fact itself, is a wound for a whole nation at a cultural, social and certainly economic level.

At the same time, all the factors mentioned so far, inevitably bring to our mind that specific conflicts or negative events such as terrorism or acts of war maybe magnified through the media thereby giving meaning and interpretation to the incident (Alvarez, and Campo,2014,p.71) ,affecting consumer's and **tourists psychology**. In particular, in a more psychological approach, consumers tend to take into account **lifestyle motivation**[9] choosing brand names or famous tourist destinations that can give them prestige and status.
Additional factors can be the **education or the cultural level** of the population travelling. Particularly, the cultural background is estimated that plays a significant role in the determination of the perceptions of travel agents regarding the level of instability at selected Mediterranean destinations (Seddighi, Nuttall and Theocharous, 2001, p.18).
Last but not at least, the adjustment **to climate change** is a factor which strongly influence the development of the tourism sector (Lanquar, 2013, p.5).
To sum up, the various factors influencing tourism demand as well as contributing to tourism development through their appropriate exploitation can enhance innovative tourism services and products in order to act as a pole of attraction for tourists of a country and their safe stay. Therefore, a better understanding of factors that influences the image of a country and the effect of events and political incidents "on the views that individuals hold about the place" (Alvarez and Campo, 2014, p.76) is crucial for making better decision and adopt a well-formed strategy in crisis management.
It is also important to understand the ways through which international incidents, media reports or other sources of information affect the country's image and whether this influence has temporary or no effect (ibid, p.72) for the state and its economy. As a result, an emerging or a lack of tourism development will benefit or hurt the country at both welfare and social level.

[8] http://edition.cnn.com/2017/01/20/middleeast/palmyra-isis-theater/index.html.
[9] Hellenic Chamber of Hotels, www.grhotels.gr/GR/xee/ITEP/DocLib2/.../01_Kef02.pdf.

2 DEFINING THE ECONOMIC CONTRIBUTION OF TRAVEL & TOURISM: RECEND TRENDS AND ESTIMATES

Speaking about Tourism Policy in the Mediterranean area we should refer to the styles of tourism operating in the Mediterranean countries. Tourism in the Mediterranean is primarily oriented to recreation related to the sea but in this respect the tourism stereotype is no different than it is in several popular tourist sea-sides worldwide (Apostolopoulos et al. 2001, p.242).

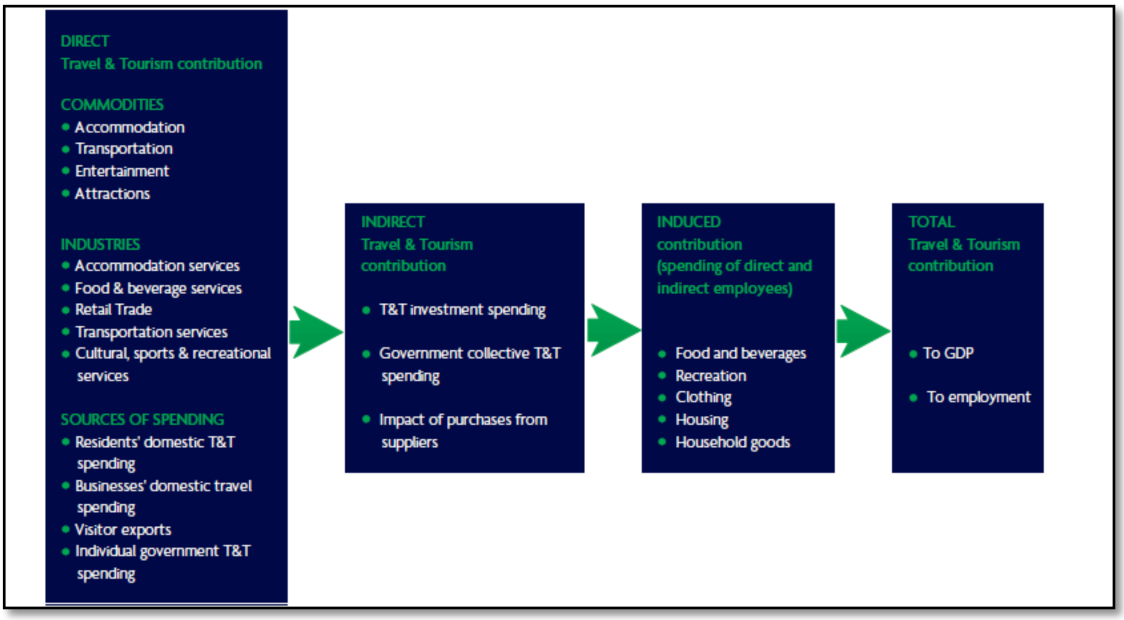
Travel and Tourism is an important economic activity in most Mediterranean countries and presents direct economic impacts as well as indirect ones.

The UN Statistics Division quantifies only the direct contribution of Travel and Tourism but WTTC recognizes that Tourism's total contribution is much greater and aims to capture its indirect impacts trough its annual research (WTTC, 2017).

The following table reflects briefly and precisely what we call **direct and indirect impacts of Tourism** in a country's economy:

Table 2.1.1.

Source: WTTC,Travel & Tourism, Economic Impact 2017,p.2.



i) The direct contribution of Travel and Tourism to GDP reflects the internal spending on Travel & Tourism meaning total spending within a particular country by residents or non-residents for business and leisure purposes (WTTC, 2017).

As well as government "individual" spending – spending by government on Travel and Tourism services directly linked to visitors such as cultural (eg museums) or recreational (eg national parks). (ibid).

The direct contribution of Travel and Tourism to GDP is calculated from total internal spending by "netting out" the purchases made by the different tourism sector.

ii) The indirect impacts known as "wider' impacts include the GDP and jobs supported by:

- Travel & tourism investment spending-an important aspect of both current and future activity like investment activity such as the purchase of new aircraft and the construction of new hotels.
- Government "collective" spending on Travel and Tourism activities in many different ways as it is made on behalf the 'community'- eg. Tourism marketing and promotion, aviation, administration, security services, resort area security services, sanitation services etc.
- Domestic purchases of goods and services by the sector dealing directly with tourists – including for example purchases of food and cleaning services on behalf of hotels, fuels or catering services by the airlines, IT services by travel agents. (WTTC, 2016).

In the following tables, is important to see tourism's contribution to a country's GDP but also to employment and investments. (Data 2015-2016).

<u>Table 2.1.2</u>.

Mediterranean Countries' Rankings,

Relative contribution to GDP, 2015

Source: WTTC, Travel & Tourism Economic Impact, Tunisia (2016)

Travel & Tourism's Direct Contribution to GDP		2015 % share	Travel & Tourism's Total Contribution to GDP		2015 % share
12	Malta	15.1	23	Malta	27.7
31	Lebanon	8.1	30	Lebanon	22.1
34	Morocco	7.7	39	Cyprus	19.3
35	Greece	7.6	40	Greece	18.5
42	Cyprus	6.4	42	Morocco	17.5
47	**Tunisia**	5.8	47	Spain	16.0
48	Spain	5.8	61	Turkey	12.9
56	Turkey	5.0	62	**Tunisia**	12.6
58	Egypt	4.9	69	Egypt	11.4
72	Italy	4.2	84	Italy	10.2

Table 2.1.3.

Contribution to Employment, 2015

Travel & Tourism's Direct Contribution to Employment		2015 % share	Travel & Tourism's Total Contribution to Employment		2015 % share
10	Malta	16.5	19	Malta	28.8
21	Greece	11.3	27	Greece	23.1
32	Lebanon	7.9	30	Lebanon	21.3
40	Morocco	6.8	33	Cyprus	20.1
42	Cyprus	6.6	47	Spain	16.2
55	Tunisia	5.3	49	Morocco	15.6
57	Spain	5.2	63	Italy	11.6
60	Italy	5.0	64	Tunisia	11.5
70	Egypt	4.4	76	Egypt	10.5
	World	3.6		World	9.5
	Africa	3.0	105	Turkey	8.3
140	Turkey	2.3		Africa	7.2

Table 2.1.4.

Contribution to Investments, 2015

Travel & Tourism Investment Contribution to Total Capital Investment		2015 % share
28	Greece	14.8
31	Cyprus	14.0
34	Egypt	12.5
35	Morocco	12.4
45	Malta	10.4
47	Turkey	9.9
48	Lebanon	9.9
60	Tunisia	8.4
67	Spain	7.7

Table 2.1.5.

Contribution to total exports, 2015

Visitor Exports Contribution to Total Exports		2015 % share
20	Lebanon	51.9
47	Greece	25.8
48	Cyprus	24.5
55	Morocco	21.2
58	Egypt	20.7
65	Turkey	17.7
71	Spain	15.6
85	Malta	10.3
93	Tunisia	9.1

Table 2.1.6-2.1.8

Mediterranean Countries' Rankings,

Real Growth, 2016

Source: WTTC, Travel & Tourism Economic Impact, Tunisia (2016)

Travel & Tourism's Direct Contribution to GDP		2016 % growth
36	Malta	5.1
38	Lebanon	4.8
49	Cyprus	4.3
81	Spain	3.4
	World	3.3
	Africa	2.5
124	Italy	2.1
132	Morocco	2.0
156	Egypt	0.7
161	Turkey	0.2
170	Greece	-0.5
175	Tunisia	-1.0

Travel & Tourism's Total Contribution to GDP		2016 % growth
26	Lebanon	5.3
43	Malta	4.4
46	Cyprus	4.4
	World	3.5
82	Spain	3.5
	Africa	2.6
130	Morocco	2.0
136	Italy	1.9
152	Turkey	1.1
154	Egypt	1.0
174	Tunisia	-0.9
180	Greece	-1.8

Travel & Tourism's Direct Contribution to Employment		2016 % growth
24	Lebanon	4.1
48	Malta	2.6
51	Spain	2.6
71	Italy	2.0
	World	1.9
123	Greece	0.6
124	Morocco	0.4
	Africa	0.3
134	Cyprus	-0.1
136	Turkey	-0.2
153	Egypt	-0.9
160	Tunisia	-1.3

Travel & Tourism's Total Contribution to Employment		2016 % growth
14	Lebanon	4.4
38	Cyprus	3.0
53	Spain	2.4
	World	2.2
75	Malta	1.8
84	Italy	1.7
118	Turkey	0.7
126	Morocco	0.4
	Africa	0.2
151	Egypt	-0.6
152	Greece	-0.6
165	Tunisia	-1.3

Travel & Tourism Investment		2016 % growth
48	Spain	6.3
64	Lebanon	5.6
70	Italy	5.3
74	Cyprus	5.3
	Africa	5.0
	World	4.7
108	Morocco	3.9
112	Turkey	3.7
117	Malta	3.5
129	Egypt	2.8
169	Tunisia	-0.1
184	Greece	-7.6

Visitor Exports		2016 % growth
34	Malta	5.5
47	Spain	4.7
52	Cyprus	4.5
84	Lebanon	3.3
	World	3.0
106	Italy	2.4
109	Morocco	2.3
116	Greece	2.2
	Africa	1.2
172	Turkey	-2.3
180	Egypt	-4.0
182	Tunisia	-4.8

2.1 OECD'S estimates

According to OECD's latest report (2016) about Tourism Trends and Policies (OECD, 2016) addressed to tourism policy makers (ibid), three (3) are the most important key areas about the tourism sector and its economic impacts **i.**

Strengthening the strategic operating framework **ii**. Re- thinking existing political incentives and **iii**.Adopting modern regulatory approaches (Johal and Zon, 2015).

More specifically, concerning the **1st pillar** actions like EU task force on collaborative economy advocates, new tourism business model and SMEs in 2015, includes the impacts on the sharing economy and tourism promoting mainly a sustainable tourism model (see 1.1.).

This model is focused on "**reducing the carbon footprint of tourism"**, resource conservation and social cohesion. This policy also includes *the scope of the informal economy tra*cking undeclared transactions in tourism branch which typically are not captured by government rules and regulations and contribute to the efficiency of taxation. Highlighting *the role of government in the marketplace* is a further step of this policy.

Continuing with the **2nd pillar, "rethinking political and cultural incentives"** includes measures for adopting a more transparent policy in decision –making process concerning tourism far from clientelist systems and lobbying. Moreover, giving bureaucratic incentives in the public services in the Tourism field mainly by encouraging civil servants to use new technologies and being more innovative in the applied policies.

Finally, the issue of adopting "**an end-use mindset"** that is referred when the planning of a Tourism policy is pertinent and is designed in order to serve the governments themselves and not serve the consumer or the residents of a Tourist destination. Drafting a framework in order to satisfy the consumers but also the citizens and have equal benefits for all the participants and of course tourist operators or the stakeholders in the tourism market still remains the big deal.

It is almost a rule that the concentration of tourist activity in very specific places or "key locations around cultural or physical attractions (archeological sites, fragile coastal areas, islands) is accompanied by the concentration of other activities as well" (Apostolopoulos et al. 2001, p.7) and especially in the case of cultural advantages, strong incentives should be integral part of Tourism Policy.

The **3rd pillar, "Modernizing policy and regulatory approaches"** is mainly related to the big obstacles in growth, in most countries deriving from regulatory frameworks. What exactly has to be done is about a change in governments' perspective and structure involved in the tourism industry. Employments standards, competition, defining taxable activity and local zoning matters. Moreover, the field of transportation, accommodation, service and restaurants will necessarily involve officials at a ministerial level but also from other levels of government (local authorities),(OECD, 2016, p.114). OECD is in a favor of creating a taskforce consisted of relevant officials in order obtain a complete approach of a whole-of-government perspective on the tourism field.

In addition, in this part is included *the waives and exemptions point*, for new enterprises aiming at a win-win situation for new- entries in the tourism industry and the regulators in order to evaluate the type of rules that make sense, (OECD, 2016, p.115).

Last but not at least, *transparency* as already mentioned is proposed as the basic principle that should rule the entire framework around consultation process eliminating partialities for example for a particular stakeholder group or lobbying interest to the detriment of the broader public interest.

3 THE MEDITERRANEAN BEFORE THE ARAB SPRING: TOURISM 'S USEFUL DATA BEFORE THE OUTBREAK

During the last decade in the Mediterranean countries, tourism has followed an upward course but not without fluctuations mainly due to the political circumstances of the particular geographical area (Greek Tourism Organization, 2015, p.25).

According to a recent research (Lanquar, 2013,) from 1990 to 2010, 11 countries of the southern and eastern Mediterranean including Algeria, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, Palestine, Syria, Tunisia and Turkey recorded the highest growth rates of inbound world tourism. The economic performance of tourism in these countries was remarkable given the security risks, natural disasters, oil price hikes and the economic uncertainties of the region (ibid, p.4).

More specifically, the tourist performance for Turkey has been on the rise in recent years after the 2006 downturn and there was a relative increase in arrivals to Euro-zone destinations (Spain, Italy, Cyprus, and Malta) up to 2011. Croatia, Slovenia, and Morocco have been also on the rise in tourism (Greek Tourism Organization, 2015, p.25).

Greece has broadly maintained its position among the main competing Mediterranean countries after Spain and Italy (Greek Tourism Organization, 2015, p.25). Nevertheless, Greece has suffered the pressure of the economic crisis on the one hand

and on the other hand the emergence of new and dynamic tourist destinations in the Mediterranean region such as Croatia, Bulgaria and Montenegro which have stood out because they are claiming a similar tourist product. Moreover, concerning the Greek tourism issue, other parameters like the relatively strong euro versus dollar exchange rate, the fall in oil prices, the slow recovery in traditional country sources, the prolonged economic crisis as already mentioned, require the Greek tourism industry to become more competitive (ibid).

The most interesting case is the French Mediterranean, constituting 10 per cent (10%) of the Mediterranean coastline (Apostolopoulos et al. 2001, p.39) which through the years developed three (3) different models of Tourism Development[10] such as a) Provence-French Riviera with significant urbanization (Marseilles, Nice, Cannes), real estate high prices and a lot of residential b) the island of Corsica with a strong identity and a stronger resistance to tourism development but lately with an increasing range of alternative Tourism (hiking, climbing, trekking, motorcycling), c) Languedoc Roussillon with a proactive and spatial planning conducted by the French state, high flows of tourists and a model of integrated settlements.

A very specific index or should we say a dependent variable related to tourist development is the arrivals of tourists. This index will be used primarily for the needs of the present work in this and the following chapter.

Kokkari, Samos, Greece

[10] Based on the Presentation of Corinne LESPINASSE TARABA, Deputy Manager Tourism Engineering and Development, 2nd UNWTO Conference on Destination Management in the Mediterranean, Quality – The Key Driver for Success in the Mediterranean", Budva, Montenegro, 22-24 June 2015.

A) Data before the Arab Spring:

Table 3.1.

International Tourist arrivals

Source: UNTWO, *Tourism Highlights*, 2011 edition

	International Tourist Arrivals (million)							Market share (%)	Change (%)		Average annual growth (%)
	1990	1995	2000	2005	2008	2009	2010*	2010*	09/08	10*/09	'00-'10*
World	**435**	**528**	**675**	**798**	**917**	**882**	**940**	**100**	**-3.8**	**6.6**	**3.4**
Advanced economies[1]	**296**	**334**	**417**	**453**	**495**	**474**	**498**	**53.0**	**-4.3**	**5.1**	**1.8**
Emerging economies[1]	**139**	**193**	**257**	**345**	**421**	**408**	**442**	**47.0**	**-3.2**	**8.3**	**5.6**
By UNWTO regions:											
Europe	**261.5**	**304.1**	**385.6**	**439.4**	**485.2**	**461.5**	**476.6**	**50.7**	**-4.9**	**3.3**	**2.1**
Northern Europe	28.6	35.8	43.7	57.3	60.8	57.7	58.1	6.2	-5.1	0.8	2.9
Western Europe	108.6	112.2	139.7	141.7	153.2	148.6	153.7	16.3	-3.0	3.4	1.0
Central/Eastern Europe	33.9	58.1	69.3	8.5	100.0	90.2	95.1	10.1	-9.9	5.4	3.2
Southern/Mediter. Eu.	90.3	98.0	133.0	153.0	171.2	165.1	169.7	18.1	-3.6	2.8	2.5
North Africa	8.4	7.3	10.2	13.9	17.1	17.6	18.7	2.0	2.5	6.2	6.2
Middle East	**9.6**	**13.7**	**24.1**	**36.3**	**55.2**	**52.9**	**60.3**	**6.4**	**-4.3**	**14.1**	**9.6**

Table 3.2.

International Tourism Receipts

	International Tourism Receipts Local currencies, constant prices change (%)			Share (%)	US$ Receipts (billion)		US$ Receipts per arrival	Euro Receipts (billion)		Euro Receipts per arrival
	08/07	09/08	10*/09	2010*	2009	2010*	2010*	2009	2010*	2010*
World	**1.7**	**-5.6**	**4.7**	**100**	**851**	**919**	**980**	**610**	**693**	**740**
Advanced economies[1]	**1.8**	**-6.5**	**4.4**	**63.1**	**547**	**580**	**1,160**	**392**	**437**	**880**
Emerging economies[1]	**1.5**	**-3.8**	**5.1**	**36.9**	**304**	**339**	**770**	**218**	**256**	**580**
By UNWTO regions:										
Europe	**-0.9**	**-6.7**	**-0.4**	**44.2**	**410.9**	**406.2**	**850**	**294.6**	**306.4**	**640**
Northern Europe	-2.5	-4.0	-1.3	6.4	58.6	59.2	1.010	42.0	44.6	760
Western Europe	-2.2	-7.1	1.5	15.5	143.8	142.0	920	103.1	107.1	700
Central/Eastern Europe	4.3	-8.0	-2.8	5.2	47.4	47.7	500	34.0	36.0	380
Southern/Mediter. Eu.	-0.6	-6.9	-1.1	17.1	161.3	157.4	930	115.6	118.7	700
Middle East	**5.5**	**0.8**	**14.4**	**5.5**	**42.0**	**50.3**	**830**	**30.1**	**37.9**	**630**
North Africa	-3.9	-4.7	3.6	1.1	9.9	10.0	540	7.1	7.5	400

4 THE POST ARAB SPRING ERA: IMPACTS OF THE ARAB SPRING ON TOURISM IN THE MEDITERRANEAN REGION, MAPPING THE CRISIS

In 2011 the West was looking to the East because it seems that something unusual was happening: The Arab uprisings. The so-called Arab spring that started from Tunisia, quickly expanded to other countries of the Arab world such as Egypt and Libya and Morocco in a smaller scale.

The term Arab Spring includes all the unrests with revolutionary and rebellious nature that took place in countries of North Africa and Near East. Certainly, the mobilizations, the conditions and the incidents of the Arab uprisings were different from country to country but they had many things in common such as the anger of the youths, the unity of the people and the demand for economic inclusiveness, democracy, equality and human rights (Kiriakidis, Litsas, 2016).

The countries of the Mediterranean and certainly the MENA region were always considered as top tourism destinations for the westerners before the Arab uprisings and the rise of political Islam because they were offering to the tourist exotic landscapes, historical-archaeological trips, gastronomy and folklore. Unfortunately, during the last years most of the North-African countries became suitable grounds for extremist Islamic groups with many attacks against westerners and locals. Therefore, the Islamic attacks have led to a dramatic fall in tourism, particularly in parts of North Africa and this fact has a huge negative impact to their economies highly associated with the incomes of tourism.

4.1 Mapping the crisis

As it had been mentioned above, it is a fact that international tourist flows are affected in the short term by the cyclical changes in political, economic or natural conditions, but through the time the resilience of international tourism has been proved even to crises that disrupt the global economy or may cause radical changes in the political system of a country as well in its society. That was also the case with the beginning of the Arab Spring in the NA region, in 2011.

To proceed, despite being one of the wealthiest regions in the world, thanks to its substantial oil reserves, Mediterranean countries located in Middle East but also in North Africa, have seen GDP growth slow again in the wake of the Arab Spring in 2011, creating negative perceptions of the region[11].

Protest awaking in Tunisia at first, had as a result the political turmoil, a number of destinations suffered in 2011, including also Egypt, Yemen, Syria and Libya. Egypt is among the destinations expected to see continued negative growth during the

[11] http://blog.euromonitor.com/2011/09/new-report-impact-of-the-arab-spring-on-travel-and-tourism-in-the-middle-eastarticle-26-sep-2011.html

forecast period, notably in inbound tourism spending, mainly associated to the decline in average prices across different categories[12].

The war in Syria has created another issue for the neighboring Mediterranean countries Greece and Turkey, while simultaneously both of them tried to manage the refugee crisis.

Nevertheless, political developments in recent years and the persistence of turbulence in North African countries such as Tunisia, Libya and Egypt, the Middle East (Syria, Israel) or the Black Sea (see the crisis in Ukraine) appear to have relatively temporary positive effects on Greek destinations (islands) which provide a relatively safer environment for the development of tourist activities (Greek Tourism Organization, 2015, p.27).

At the same time, similar fluctuations are also envisaged in the medium term but possible sparks in political, ethnic and religious conflict areas will not always favor specific Mediterranean destinations(like the Greek case).

In general, the Arab uprisings had a significant impact economic activity in the area and one of the most immediate effects was "a sharp decline in Tourism" **(**Avraham, 2015, p. 224) mainly in the MENA region.

4.2 The Impact of the Arab Spring on Tourism

The tourism sector is particularly sensitive to political instability as it was highlighted in a previous chapter. The Arab Spring is reported to have caused "damage" to the tourism industry in affected countries already, both in terms of visitors and investment. Some initial evidence indicates that:

- During 2011, receipts from tourism decline in Egypt and Tunisia by up to 1 percent of GDP.
- According to Egypt's Tourism Minister, revenues from tourism February 2011 were 80 percent below 2010 levels. In March, this number fell by 60 percent and in April by 35 percent. The latest available data point to an overall fall of 33 percent during January–March 2011. Tourism revenues fall by 25 percent for the whole of 2011, although recent estimates by the Egyptian government indicate a gradual recovery in this sector.

[12] http://blog.euromonitor.com/2011/09/new-report-impact-of-the-arab-spring-on-travel-and-tourism-in-the-middle-eastarticle-26-sep-2011.html

- According to Tunisian officials, tourism receipts to the end of April 2011 dropped by 48 percent in comparison to 2010. The estimates point to a fall of 51 percent in income from tourism and 39 percent in the number of tourists during the first half of 2011.
- The UN World Tourism Organization estimated that, during the first two months of 2011, international tourist arrivals to Tunisia decreased by 44 percent and receipts by 43 percent.

Although estimates are not yet available for Syria, the tourism industry, which accounts for 12 percent of employment and GDP, is being greatly damaged by the current levels of instability. (O'Sullivan, Rey and Mendez, p.20).

B) Data: a chronological display

Table 4.2.1.

Development of tourist arrivals in the Mediterranean countries 2008-2014

Source: Greek Tourism Organization, Trends in tourist movement 2008-2015 (p. 24)-Data derived from UNWTO (World Tourism Barometer, Vol 13, June 2015/ Tourism Highlights, 2015 edition)

Country	(*)	2008	2009	2010	2011	2012	2013	2014
Spain	TF	57 192	52178	52677	56177	57464	60661	64995
Italy	TF	42 734	43239	43626	46119	46360	47704	48576
Turkey	TF	24 994	25506	31364	34654	35698	37795	39811
Greece	TF	15 939	14915	15006	16427	15518	17920	22033
Croatia	TCE	9 415	8694	9111	9927	10369	10955	11623
Morocco	TF	7 879	8341	**9288**	**9342**	**9375**	**10046**	**10282**
Egypt	TF	12 296	11914	14051	9497	11196	9174	9628
Portugal	TF	6 962	6439	6832	7412	7685	8324	9323
Tunisia	TF	7 049	6901	6902	4785	5950	6269	6069
Israel	TF	2 572	2321	2803	2820	2886	2962	2927
Algeria	VF	1772	1912	2070	2395	2634	2733	
Cyprus	TF	2404	2141	2173	2392	2465	2405	2411
Albania	TF	1337	1775	2191	2468	3156	2857	
Slovenia	TCE	1771	1803	1869	2037	2156	2259	2441
Serbia**	TCE	1677	1689	683	764	810	922	1029
Montenegro	TCE			1088	1201	1264	1324	1350
Malta	TF	1291	1182	1339	1415	1444	1582	1690
Libanon	TF	1333	1851	2168	1655	1366	1274	1355
Bosnia-Erz.	TCE	322	311	365	392	439	529	536
Syria	TCE	5430	6092	8546	5070	-	-	-

(*) TF= arrivals of tourists at the border

TCE = arrivals at collective accommodations

VF= arrivals of visitors at the border

(**) up to 2009 includes also Montenegro

It is very important to note that many European Mediterranean countries, Turkey as well have been "positively" affected in the tourism sector since the Arab Spring, and it is also remarkable that Morocco is the only NA country which still as a popular exotic destination, continued to restrain its tourist movement and even to present an increase after Arab' Spring outbreak. The real picture claims that after "the start of the

Arab spring, contrary to some predictions, the entire Mediterranean region (Northern and Southern rims) did not lose its significant share in the world tourism market. However, the SEMC suffered losses in 2011, which were reversed, to some extent, in 2012(except Lebanon, Syria and Egypt).In the case of the SEMC, Europe is the main originating region of incoming tourism (UNWTO 2009). Tourist arrivals from new emerging markets such as Russia, India or China are still small but are growing. Only Turkey and Egypt attract a substantial number of Russian tourists" (Lanquar, 2015 p.111).

Table 4.2.2.

International Tourist arrivals

Source: UNTWO, *Tourism Highlights*, 2017 edition

	International tourist arrivals (million)							Market share (%)	Change (%)			Average a year (%)
	1990	1995	2000	2005	2010	2015	2016*	2016*	14/13	15/14	16*/15	2005-'16*
World	**435**	**526**	**674**	**809**	**953**	**1,189**	**1,235**	**100**	**4.0**	**4.5**	**3.9**	**3.9**
Advanced economies¹	299	337	424	470	516	654	685	55.5	5.7	5.0	4.8	3.5
Emerging economies¹	136	189	250	339	437	536	550	44.5	2.1	4.0	2.7	4.5
By UNWTO regions:												
Europe	261.5	303.5	386.6	453.2	489.0	603.7	616.2	49.9	1.7	4.8	2.1	2.8
Northern Europe	28.7	36.4	44.8	59.9	62.8	75.4	80.2	6.5	5.3	6.5	6.4	2.7
Western Europe	108.6	112.2	139.7	141.7	154.4	181.4	181.5	14.7	2.2	3.5	0.0	2.3
Central/Eastern Europe	33.9	58.9	69.6	95.3	98.5	121.4	126.0	10.2	-9.1	5.4	3.8	2.6
Southern/Medit. Europe	90.3	96.0	132.6	156.4	173.3	225.5	228.5	18.5	6.9	4.9	1.3	3.5
-of which EU-28	230.1	266.0	330.5	367.9	384.3	477.8	500.1	40.5	4.7	5.3	4.7	2.8
North Africa	8.4	7.3	10.2	13.9	19.7	18.0	18.6	1.5	-1.4	-12.0	3.5	2.7
Middle East	**9.6**	**12.7**	**22.4**	**33.7**	**55.4**	**55.6**	**53.6**	**4.3**	**8.7**	**0.6**	**-3.7**	**4.3**

Table 4.2.3.

International Tourism Receipts

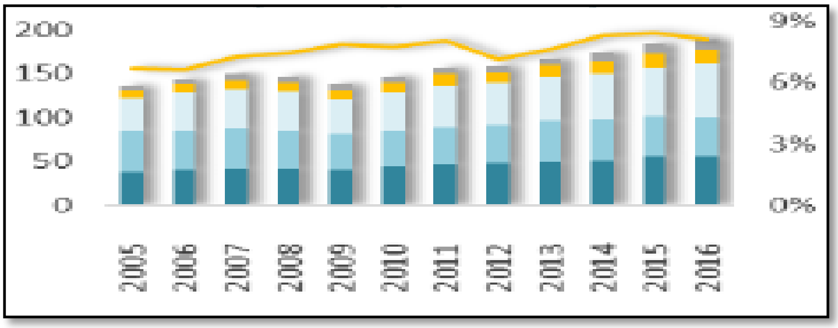
	International tourism receipts Local currencies, constant prices (% change)				Market share (%)	Receipts (US$) (billion)			per arrival	Receipts (euro) (billion)			per arrival
	13/12	14/13	15/14	16*/15	2016*	2014	2015	2016*	2016*	2014	2015	2016*	2016*
World	**5.6**	**4.3**	**4.1**	**2.6**	**100**	**1,252**	**1,196**	**1,220**	**990**	**942**	**1,078**	**1,102**	**890**
Advanced economies¹	6.0	5.1	2.9	1.6	64.5	829	773	787	1,150	624	697	711	1,040
Emerging economies¹	4.7	2.8	6.4	4.4	35.5	423	422	433	790	318	381	391	710
By UNWTO regions:													
Europe	4.1	4.4	2.7	0.9	36.7	513.7	449.6	447.3	730	386.7	405.3	404.1	660
Northern Europe	7.6	5.8	7.4	2.7	6.1	81.5	77.3	74.6	930	61.3	69.7	67.4	840
Western Europe	2.1	3.4	-1.3	-0.3	11.9	174.2	145.8	145.3	800	131.1	131.4	131.3	720
Central/Eastern Europe	3.4	0.1	-0.7	5.7	4.3	58.8	50.4	52.6	420	44.3	45.4	47.5	380
Southern/Medit. Europe	4.8	6.1	5.2	-0.2	14.3	199.2	176.1	174.7	760	150.0	158.7	157.9	690
-of which EU-28	3.7	4.6	3.1	2.7	30.9	427.1	372.1	376.6	750	321.5	335.4	340.2	680

Table 4.2.4

Arrivals of foreign tourists in Mediterranean hotels: mill. Tourists/shares of Eur. Mediterranean countries

Source: National Bank of Greece

Directorate of Economic Analysis, Small and Medium Enterprises: Conjunction research (August 2017), p.11.



Italy, Spain, Portugal, France, Greece

5 CASE STUDY TUNISIA- THE INITIAL CASE OF THE ARAB SPRING: ECONOMY, TOURISM & SOCIETY

5.1 The background

Tunisia in 2011 was the place where the Arab uprisings began and the site of the greatest progress toward democracy (Kiriakidis, Litsas, 2016).

To be more concrete, the Arab Spring uprisings began in Tunisia in December 2010 as a wave of political upheaval and expanded throughout North Africa and Middle East. In Tunisia and Libya leaders were ousted, in Syria a civil war started, in Morocco, Algeria and Lebanon the government adopted reforms and a variety of measures as a result of the protests.

Three years later, in 2014, Tunisia was marked by a new stage in the democratic transition, with the adoption of a new Constitution allowing for parliamentary and Presidential elections later that year. The formation of a new, inclusive government in February 2015 marked another crucial milestone (OECD, Policies, B. et al., 2015). Nowadays, despite the persistent concerns about the effects of democracy and the new trends, the vast majority of Tunisians continue to say that Democracy, whatever its problems, is the best system of government for their country (Robbins, M., 2017, pp. 80–89). As the Tunisian case suggests, Arab people are responding mainly to developments at home rather than to wider regional factors.

After Arab Spring's outbreak, Tunisia's old model of economic development brought strong growth for a time, but it stored up problems for the future. One of these is considered **the high youth unemployment (25.2%)** as we will see below and stark regional inequalities, in particular, sowed the seeds of social unrest which ultimately gave rise to the political transformation we have witnessed since 2011 (ibid).

We cannot ignore the fact that in Tunisia in 2015, unfortunately there were two of the strongest terrorist attacks (Bardo and Sousse attacks) which stroke at the heart of the country's tourism industry[13].

Travel and Tourism play a pivotal role in the country's economy generating over 15% of its GDP at around US$ 7.4 billion and supporting nearly 14% of total employment (ibid), till 2015.

5.1 The economy in Tunisia and the recent trends

In general, the economic system ruling the Arab countries is characterized by many informalities and strong political control over the economy mainly from the regime and the business elite. A symbiotic relationship developed between political rulers and the socially dominant businessmen through networks of patronage (Sika, N. M. and Sika, N. M., 2017, p.47).

In oil-exporting countries such as the Saudi Arabia, Qatar and the UAE, the dominant economic model is the rentier state model which formulates the powers. Under this construct, states which have access to different sources of rent are able to establish the regimes' legitimacy through their redistributive role (Luciani, 2007).

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But in the other Arab countries such as Tunisia, Egypt, Lebanon, Algeria and Morocco do not have significant rent systems so these states have been dependent on less reliable revenue sources, like foreign aid, migrants' remittances and private investments. Therefore, they are much weaker and more vulnerable to economic shocks than oil-exporting rentier countries (Sika, 2017, pp. 43–67).

The regimes of these countries do not have access to much wealth but they have been able to intervene in the liberalizing economy through economic incentives and distribution of patronage and privilege for the business elite (ibid).

[13] https://www.wttc.org/media-centre/press-statements/2015/terrorist-attack-in-tunisia-26-june-2015/

5.2 Tunisia in figures

Table 5.2.1

Source: Euromonitor International,Tunisia[14]

ECONOMIES

	2011	2012	2013	2014	2015	2016
GDP (USD million)	45,824.2	45,045.6	46,251.7	47,628.8	43,019.5	41,725.5
Real GDP Growth (% growth)	-1.9	4.2	2.5	2.4	0.9	1.0
Inflation (% growth)	3.5	5.1	5.8	4.9	4.9	3.7
Unemployment Rate (% of economically active population)	18.3	17.4	15.8	15.1	15.2	15.5
Exchange Rates Against US Dollar (TND per USD)	1.4	1.6	1.6	1.7	2.0	2.1

GDP Growth decelerated to 0.9% in 2015, compared to a forecast of 3% at the beginning of the year. This was largely a result of the **negative economic impact of the terrorist attacks** of that year-particularly **on Tourism**, **the transport and the investment.**

In 2016, GDP growth reached 1.0%-significantly less from the initial target of IMF's programme that was the 2.5%.

For 2017, Tunisia expects a moderate acceleration in GDP growth up to 2.3%, assuming that ongoing government's reforms help to attract foreign investments and foster exports and a social stability is maintained, helping to avert the frequent production stoppages seen in recent years (European Commission, Background Note 2017, p.3).

Table 5.2.2

Youth Unemployment Rate

Source: International Labor Organization[15]

Youth Unemployment Rate (countries N.A.)	Total (%)
Morocco	**19.9**
Algeria	**37.6**
Tunisia	**25.2**
Libya	**48.7****
Egypt	**37.6**

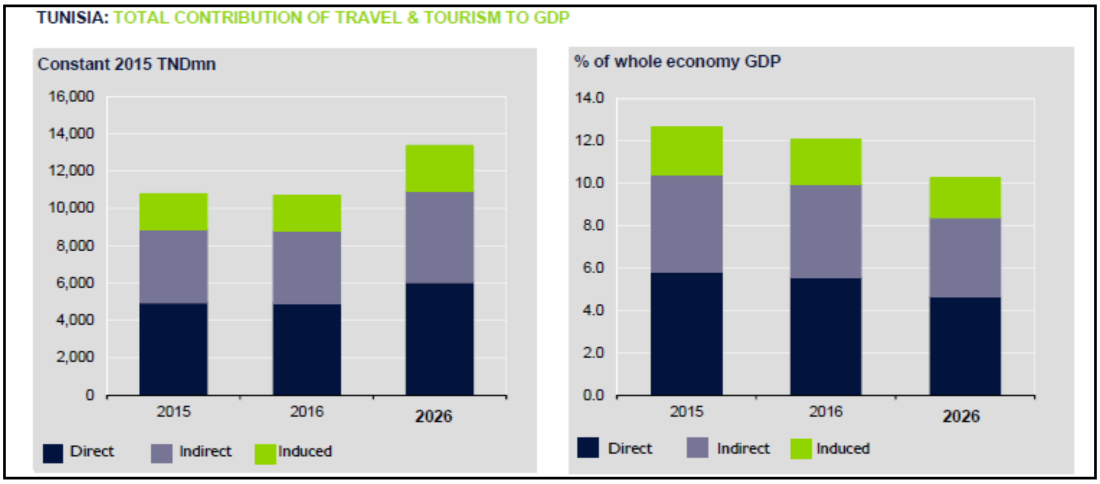
[14] http://www.euromonitor.com/tunisia/country-factfile
[15] iLO's data:https://www.ilo.org/ilostatcp/CPDesktop/?list=true&lang=en&country=DZA.
**ILO data for Libya updated till 2012.

The advent of the Arab Spring added pressure to unemployment rates and specially to youth unemployment in most North African countries, given the slowdown in economic activity in the most affected countries and the slowdown in the economic growth of major OECD and non-OECD economies (OECD, Economic Outlook, 2011) . The only solution seemed to be Tourism sector.

Chefchaouen, Tunisia

Table 5.2.3.

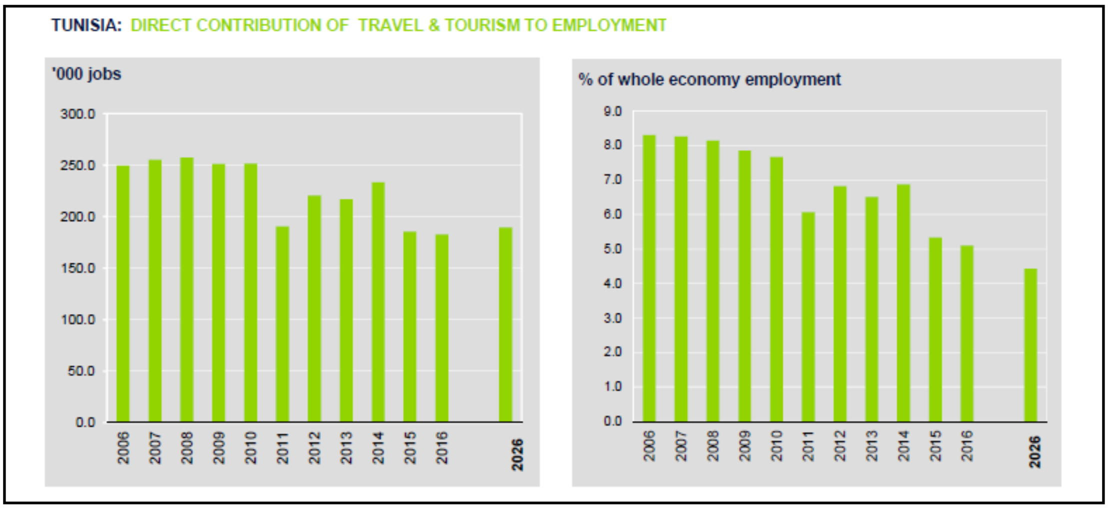
Source: WTTC, Travel & Tourism Economic Impact, Tunisia (2016)



The total contribution of Travel and Tourism to GDP (including wider effects from investment, the supply chain and induced income impacts) was TND 10,772.2 mn in 2015 -12.6% of GDP and was expected to grow by 0.9% to TND 10,674,8 mn -12,1% of GDP . There is also a forecast for rising up be 2.3% by 2026.

Table 5.2.4.

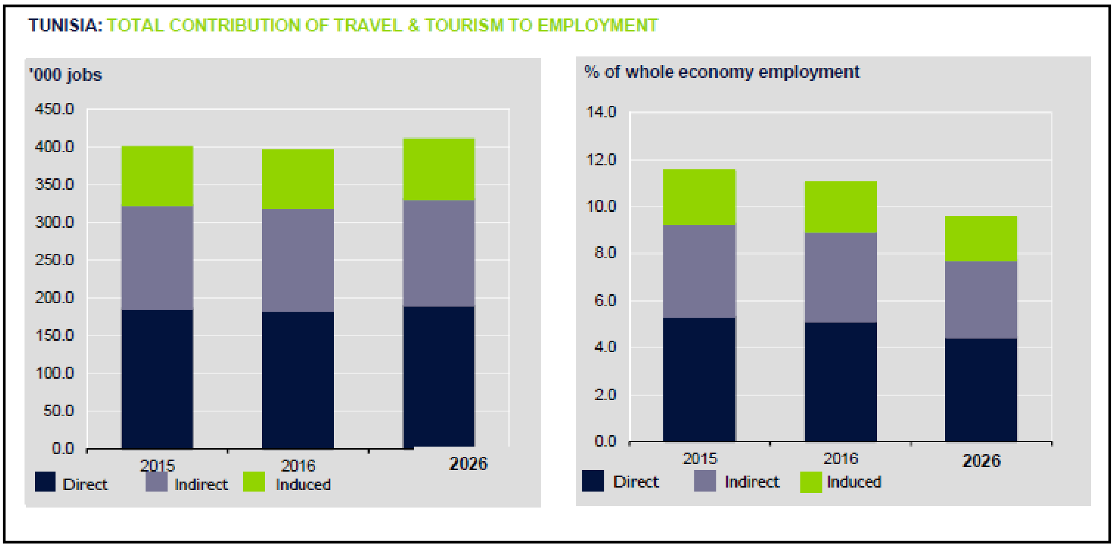
Source: WTTC, Travel & Tourism Economic Impact, Tunisia (2016)



Travel and Tourism generated 185,000 jobs directly in 2015 (5,3% of total employment) and this includes employment by hotels, travel agents, airlines, and other passengers transportation services. It also includes restaurant and leisure industries directly supported by tourists.

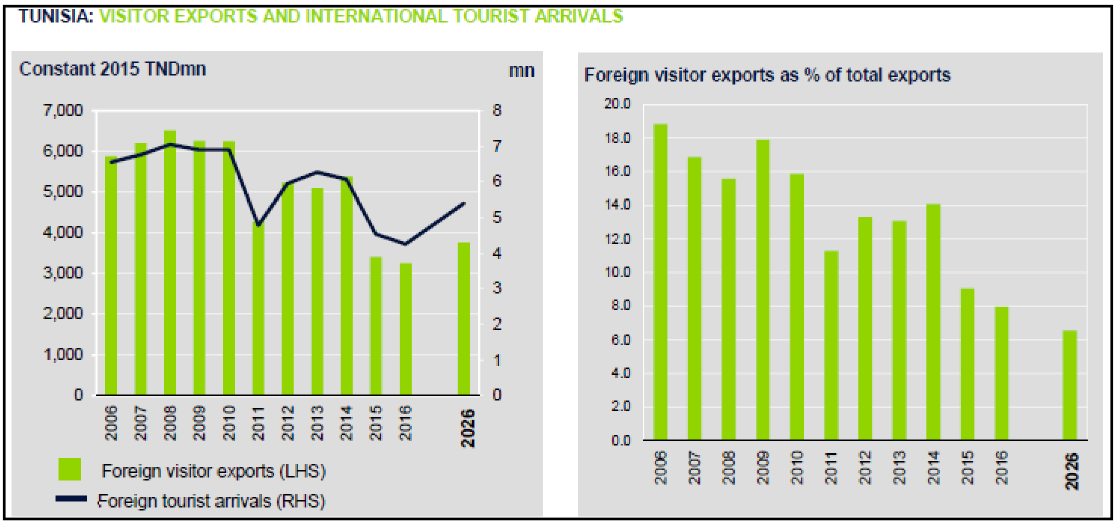
<u>Table 5.2.5.</u>

Source: WTTC, Travel & Tourism Economic Impact, Tunisia (2016)



<u>Table 5.2.6.</u>

Source: WTTC, Travel & Tourism Economic Impact, Tunisia (2016)



5.2. Society

In general terms, in many regions of MENA, developmental projects and services mainly in rural areas have been neglected. For instance, rural populations in six out of the twenty-two Arab countries including Egypt, Syria, Morocco and Tunisia (Jordan, Yemen included) constitute 53% of the overall population and yet they share of poverty is up to 74% (Sika,2017,p.53).

In Tunisia, rural poverty is five times higher than the rates in urban areas. As we also saw, the problem of high youth unemployment is persistent from 2009 up today.

However, the rising inequality between the rich and the poor, a high level of social exclusion, the concentration of wealth, are still characteristics reflecting the Tunisian society as well as the most of the Arab world (ibid).

Let us not forget that in Tunisia as well as Egypt, Algeria and Morocco protests were mostly for socioeconomic reasons and have been largely separated from the political protests for some time (ibid, p.60).

At the same time, countries like Tunisia which have undergone the first waves of uprisings have not changed the structure of their economy and they are considered to have enacted only minor measures like increases in public sector wages and some subsidies to reduce social discontent (ibid, p.63) and inequalities.

5.3 Tunisia's prospects after the Arab spring

After the elections held in Tunisia, the party of the al-Nahda (Rashid Ghannoushi) won and an important economic policy was promoted in order to facilitate foreign direct investment (Sika,2017, p.65).

According to its economic advisory board, foreign aid should be used to develop infrastructure programmes, upgrading agricultural productions and increase economic exchange between Tunisia and the northern Mediterranean economies (ibid).

A statement of the former president of Tunisia, Rashid Ghannoushi, was the country was facing the challenge of battling corruption, develop transparency and of course enhance foreign direct investments and **reinstituting Tourism** (ibid) which still remains the main source of income of Tunisia.

For instance, a related example is that the party of al-Nhada claims for the Personal Status Code (which forbids polygamy) but at the same time calls for "traditional values" (Schraeder, et al. 2017, p.18) and many wonder what could this mean as Islamists' statements in favor of the applicability of *sharia* and desire to ban alcohol and tourism (a major source of the country's income) have led to turbulent counter campaigns by secular groups (ibid).

In reality, Tunisia from 2011 and then, has conducted extensive talks with international institutions for the promotion of its economy.

Nowadays, the European Commission, on behalf of the EU, has adopted a proposal for a decision providing MFA up to 250 million to Tunisia in the forms of loan. More specifically, the assistance is indented to support the Republic of Tunisia deal with the economic impact of the political transition following the "Arab Spring", regional unrest (particularly in Libya) affecting the Tunisian economy and the impact of the week global economic environment which has contributed to slowdown in growth and generated large external and budgetary financing gaps (European Commission, Background Note, 2017, p.2).

The most crucial change is that Tunisian economy has been particularly **detrimental to tourism**, one of the countries' **leading sectors** (ibid).

Additionally, because of the two terrorist attacks, Tourist arrivals in the country fell to 5.5 million last year (2016), the lowest in decades and after several European tour companies and cruise operators suspended operations[16].

According to the macroeconomic framework agreed with EU and the IMF for the imminent recovery of the country some key structural reforms needed in Tunisia include:

- Reforming public institutions and modernizing public administration.
- Progressing with energy subsidy reform while strengthening social safety nets.
- Strengthening public financial management and transparency efforts, including through enhanced anti-corruption initiatives.
- Improving the business climate, including the adoption of a new legislative framework for investment (European Commission, Background Note 2017, p.6).

In conclusion, we could cite some suggestions regarding EU or US intervention in popular tourism destinations like Tunisia or Morocco and Egypt (Tunisia and Egypt are already quite more stable), such as:

- Increase the security in top touristic destinations in the region (like Tunis, Cartagena and Casablanca etc.)
- Convert the region to top youth destination, looking into the alternative tourism demands like: cultural activities, music and festivals in different landscapes like in the desert, nature, hiking, trekking etc) by absorbing in this way also youth unemployment in the region.
- Obtain lower prices with the airlines and the tourist offices. Or even,
- funding more European Voluntary programs of combining long length tourism with supporting locals social NGO'S.

[16] http://www.reuters.com/article/us-tunisia-tourism/after-islamist-attacks-tunisias-tourism-struggles-idUSKCN0ZB0B8.

6 THE MEDITERRANEAN COUNTRIES & THE CHALLENGES IN THE POST-ARAB SPRING PHASE: WAYS OF RESTORATION OF TOURISM'S DESTINATIONS AFTER THE CRISIS

As the situation was illustrated so far, the Arab uprisings received intensive coverage (Avraham, 2015, p. 224) and had a negative effect on tourism mainly in the MENA region.

Speaking about the post Arab Spring period in our days, not in a political sense because whether it was or remains a Spring, is still under question but in the sense of a recovery of many countries of the Mediterranean, especially of NA's countries, ruled by inequalities all the previous years, it is better to present some of the crucial challenges that the Mediterranean faces in the time and can affect in a direct way the field of Tourism as well as the restoration of tourism destinations which were hurt from the crisis.

It is important to highlight that all the factors mentioned in the first chapter (unit 1.2) and which can influence or even shape tourism flows, can now be fully understood and be visible, taking into account the crisis of Arab-Spring and its spillover effect to the Mediterranean region.

As we shall see below, there are some very important strategies, polices as well as institutional tools which can bring recovery to this Mediterranean mosaic, especially regarding Tourism but not exclusively, meaning that relations, diplomacy but also necessary processes among different tastes, need to be activated under the circumstances.

6.1 Challenges after the Arab Spring: the security factor and the institutional tools

The Arab Spring in 2011, by questioning authoritarianism, influenced the perception of what is recognized as a security problem and who can define it (Bauer, 2017).

The main challenge is considered the security force in the area and that nearly every political domestic problem can "be politically given a spin to become a security risk" (ibid).

The Arab Spring is linked to the changing security situation of the Mediterranean but maybe not with a direct way in all its countries.

Nevertheless, it emphasizes the need of democracy and civil rights (ibid) and that could be considered as the great bet, in the coming years.

The security factor as it is already mentioned above is a crucial factor contributing in attracting investments, progress and of course in the development of tourism in the economy of a state. To be realistic, the increased jobs, spending and wealth that tourism has with no doubt brought to the Mediterranean coast, has to be balanced against its associated problems (Bramwell, 2004).

To proceed, some problematization is presented around the activation of cooperation among European and non-European Mediterranean countries in order to surpass crisis such as the Arab Spring which already “hurt” in a way, part of the core of Mediterranean basin.

During the last decades, the EU has been the more active part in defining its interests and their relevance for the security dimension. It has developed a multifaceted security concept that mainly relies on legal tools and financial aid to influence the partners and a minor role to military action. On the other hand, the Southern Mediterranean countries have maintained a more traditional concept and military security (Bauer, 2017, p.4).

The beginning of a structured Mediterranean policy is located in 1995, to the Barcelona Process including a –three fold task (ibid):

i. A political and stability basket; to create a common area of peace and security by political and security dialogue.
ii. An economic and financial basket, aiming at a zone of prosperity through an economic and financial partnership and a gradual establishment of a free trade area.
iii. A social, cultural and human rights basket: approach people aiming at understanding between culture and civil society.

After almost a decade, this ambitious idea of a Mediterranean cooperation through a CSCE (Commission on security and cooperation in Europe) was renounced due to meager results in all dimensions (ibid) including undesirable results from the long-anticipated “third wave” of democratization and rule in the Arab world, the undermining resolution of the Palestine conflict in the whole process, the enduring prosperity gap between the northern and the southern partners and the poor results of a southern free-trade area build up obstacles in economic cooperation. More specifically, The Agadir Agreement, a free –trade agreement intending to

encompass all southern Mediterranean countries to boost the south-south –Trade remains up to the present a torso of Morocco, Tunisia and Egypt (Wippel, 2005).
As far as the third basket, sporadic actions were implemented so far related to cultural educational or migration issues through the cooperation of Mediterranean Universities and the launch of the Erasmus work program (Philippart, 2003, pp. 201-220).
At that point, is very important to note that for providing Mediterranean security structure, the multilateral and multidimensional security approach of the Barcelona Process appeared to be a dead end (Bauer, 2017, p.4.). Its broad idea of regional cooperative security, reaching from conflict resolution to people-to-people dialogue, left the real results far behind the ambitions (ibid).

After several years, still remains a great challenge whether it comes to Euro-Mediterranean Partnership (EMP), Euro-Mediterranean Neighborhood Policy (ENP) or the Union for Mediterranean (U*f*M) in 2008, or any other institutional tool for activating the Mediterranean region **to build a common sense of identity.** In a more optimistic point of view, such a scheme in the future may work under the circumstances of succeeding better policy reforms, building a new more interactive neighborhood status among the Mediterranean partners, normalizing the Euro-Arab partnership taking into consideration the special characteristics of civilizations, people, ethics, government and landscapes of the MENA region bringing the multiple shores of the Mediterranean together.
The effort to be close cooperation and maintain confidence among states ruled by deep heterogeneity, it must be so well-developed in the future, contributing in a common culture of safety which won't be undermined by any individual power and act as a mechanism for reconstruction and redesigning of peace regimes assigned to the area of Mediterranean, in particular in South Mediterranean region after having determined which new political alignments will emerge from the Arab transition.

6.2. Restoring popular destinations and recovering Tourism: the marketers' view

According to the marketers or the associations involved in the field of tourism, a "multi-step model for alternating the place image" was used to revive tourism and restore image of their countries during the Arab-Spring (Avraham, 2015, p. 225) in the MENA region.

By the term "marketers" we are referring to government officials or those who are approved by them and take part in a country's tourism promotion such as Tourism Minister and employees of the ministry, heads of national tourism boards, those of charge in the national tourism websites and the advertisements as well as PR campaigns, approved and published by the national tourism boards (ibid, p.226).

In January 2013, Casa Árabe and the World Tourism Organization (UNWTO) had jointly organized a high level discussion forum on Tourism in the Middle East and the North Africa (MENA) region[17] concerning the future prospects of tourism in the context of the *Arab Spring*, as well as on measures taken and possible strategies to recover and boost the sector.

More specifically, to deal with crises in Tourism and negative images resulting from the Arab Spring's up-risings and the demand for political and social change, the marketers of the MENA region have developed three types of strategies focused on: source, message and audience (Avraham, 2015, p.227).

These communication strategies are used by organizations, groups in cooperation with governments for destinations, seeking to repair their image after various kinds of crises. Organizations and groups can restore their image by promising to change overnight, apologizing, assigning blame, or taking responsibility for a crisis or problematic event. Events such as terror attacks, civil wars, mass demonstrations or political instability can damage a destinations' image and tourist numbers (ibid,p.225). The great challenge under these circumstances is to re-promote a destination's beauty, services and infrastructures as well as to soften the "hard" image of a place and finally achieve a positive one.

According to the experts, this process can take several years in order to have the desirable results. Therefore, the expansion of the image restoration field is needed in order to supply a model to help destinations suffering from negative events and imagery, such as "the multi-step model for altering a place's image. Abraham and

[17] http://middle-east.unwto.org/event/high-level-discussion-forum-strategies-recover-and-boost-tourism-mena-region.

Ketter’s (2008) claim that such a model, is a holistic model used to restore the positive image of a destination (Avraham, & Ketter, 2008,p.188).

But which is the concept of this model? A “multi step model for altering place image” is strongly linked in four types of tools: 1) advertising components like slogans, visuals or texts, 2) press interviews with officials and marketers, 3) official media policy adopted government decision-makers and marketers 4) marketing initiatives such a organizing festivals or cultural events (Avraham,2015, p. 226).

Of course, social media and web tools such as face book, twitter and YouTube are now involved in this effort.

Arab uprisings had a significant impact on economic activity in the area and one of the most immediate effects was a sharp decline in tourism to most of the countries in the Middle East. To be specific, according to the Arab Tourism Organization, the Arab tourism sector recorded a $15 billion loss as a result of the Arab Spring and the loss of 10 million tourists (ibid). In 2013, the number of tourist began to slowly increase at least for some of the countries in the southern Mediterranean (UNWTO, 2014). On the opposite, in regions like Syria (or Libya) because of the war, Tourism ceased to exist.

In our days, some countries have “changed their target audience; run recovery campaigns reduced taxes and promoted new types of tourism”(Al-Hamarneh, 2013). .

What the Arab Spring or similar upheavals or even attacks might have taught to the marketers is facing new challenges about how to keep the tourism flow (Avraham, 2015, p. 226).

Security and stability are the “magic” ingredients for new investments,innovative tour programs(Al-hamarneh and Steiner, 2017, pp. 173–182), for attracting people and restoring the familiarization of the “Westerns” with the South East Mediterranean, as a preferable exotic tourist destination.

The strategies of tourism development in the Arab world must be seen in the context of international and regional politics, security and stability issues as well as in the context of social development and economic growth in the MENA region (ibid).

For instance, “Islamic tourism” is considered as concept by the marketeres that has a chance to succeed only as a part of multiple concepts for tourim developments. Intra-Arab and Intra-Muslim tourism may indeed contribute to stabilize the national tourism industries (ibid) . The cultural concept or the religious one (related to regious tourism) may play a poisitive role and be the primal option for the choice of a tourism destination.

To conclude, International tourism will continue to face numerous crises and problems as long as militarism or violence may dominate in these regions.

After all, historically, crises can also create opportunities and reinforce some recreational activities, open up new branches and roads for economic activity, with new products that shape the new routes of the tourism economy (Bouneau, 2014) but far beyond economic indicators, job creation, dividends and foreign currencies, Tourism is considered as one of the most important “living and breathing” forms of inter-cultural dialogue (Al-hamarneh and Steiner, 2017).

Finally, the real assessment of the importance of tourism for Mediterranean economies and the prosperity of their nations requires more than the special characteristics of an exotic destination, its infrastructures, the sea the place’s transport. It requires a powerful strategy combining international relations and interest’s balance among the different Mediterranean states with security, safety and stable conditions not only to generate new investments in tourism sector but also to please tourists’ preferences and their feelings about a Mediterranean identity as an historical and cultural heritage that does not separate but in contrary, unite the people by its borders.

Sidi Bou Said ☆Tunisia☆

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