COMPARISON BETWEEN THE BULGARIAN AND THE ROMANIAN BLACK SEA COAST

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Abstract: Both Bulgaria and Romania have rather long traditions in the Black Sea tourism. This article will explore the similarities and differences in the two touristic destinations as well as their distinction and divergence in the development trend, commercial value and its impact over the respective 5 regions of Tulcea, Constanţa, Dobrich, Varna and Burgas.

Throughout the years, the Bulgarian coast managed to attract more resources to develop its infrastructure for mass tourism as more significant funds have been invested there, creating a larger hotel base, allowing for a higher market share and overall development.

The study examines the reasons, foundations and prerequisites for this from the point of view of natural resources and nature's givens as well as volume of funds distributed over time, state policies and societal attitudes. In addition, it is beneficial to elaborate the potential options and opportunities for further development in the regions, and the respective sub-districts with still unreached touristic capacity such as the regions of Tulcea, northern Dobrich and southern Varna.

The ultimate objective is to try to explain and draw conclusions for better development and increased value for the local communities in the maritime regions of Bulgaria and Romania.

Keywords: Bulgaria, Romania, Western Black Sea, Tulcea, Constanţa, Dobrich, Varna, Burgas, international tourism, profitability of tourism, touristic development.

INTRODUCTION

The Bulgarian and Romanian shorelines are both along the Western Black Sea Coast. The sea tourism on the western Black Sea coast has a long tradition. Its organizational form began in the first half of 20th century. One of the first internationally recognized destination at that time was Varna which managed to gain popularity among the higher class in post-WWI Europe.

The Bulgarian coast comprises a total base of 233 000 beds in officially registered 1-star, 2-star, 3-star, 4-star and 5-star hotels. This statistic is post-COVID as of year 2022 (NSI). Out of them 60% of the hotel beds are in Burgas region, 27% are in Varna region and 13% are in the Dobrich region respectively. In the last years Burgas region have been gaining a relative numerical advantage in terms of beds and market share. The reason behind this development is the longer shoreline of the Burgas region which possesses the longest and the most intended coastline of over 200 km itself.

There are also noticeable higher entrepreneurial activities in the South-west Black Sea coast (Burgas region) that have been gradually increasing the beds capacity over the years. This happens also not without controversies as well, as the environmentalists and ecologists are opposing the increasing building activities on the coast and the respective continuous decline of the still untouched areas or even protected by Natura 2000 and the local Bulgarian legislation.

METHODS

This is a review of the development in five maritime regions located on the Western Black Sea coast. In the article are used mainly numerical comparisons gathered from officially available statistical data (NSI (*National Statistical Institute of Bulgaria*); INSSE (*National Institute of Statistics of Romania*); ECB (*European Central Bank*)) with extensive analyses based on scientific articles and the expertise and experience of the author gained as a board member of the tourism market leader.

RESULTS AND DISCUSSIONS

Romanian Black Sea coast

In the Constanţa region in the economic sectors of Hotels and Restaurants have been occupied 11.4 thousand people in year 2021 as well as further 3.0 thousand people have been occupied in activities such as Performance, cultural and recreational activities.

The interesting thing, according to the statistics is that the COVID pandemic does not seem to overly impact the touristic labour market in Constanţa region (Table 1).

Table 1. Touristic labour market in Constanţa region.

Employees in thousands (self-employed and employed) - Constanţa	2016	2017	2018	2019	2020	2021
Hotels and restaurants	10.0	10.7	11.4	11.6	11.0	11.4
Performance, cultural and recreational activities	2.4	2.5	2.7	2.8	2.6	3.0
Cumulative	12.4	13.2	14.1	14.4	13.6	14.4
Total	286.2	284.3	284.4	287.2	286.8	266.2
In per cent (Cumulative/Total)	4.33%	4.64%	4.96%	5.01%	4.74%	5.41%

Source: INSSE (National Institute of Statistics of Romania) and author's calculations

For year 2021 the total touristic employees in Constanţa region are 5.41% out of the total people occupied with all kinds of economic activities (both self-employed and on labour/civil contracts). And for Tulcea region the analogical data are represented in Table 2.

Table 2. Touristic labour market in Tulcea region.

Employees in thousands (self-employed and employed) – Tulcea	2016	2017	2018	2019	2020	2021
Hotels and restaurants	1.9	2.3	2.3	2.4	2.4	2.4
Performance, cultural and recreational activities	0.4	0.4	0.4	0.4	0.4	0.4
Cumulative	2.3	2.7	2.7	2.8	2.8	2.8
Total	79.6	80.5	79.1	79.9	80.2	70.2
In per cent (Cumulative/Total)	2.89%	3.35%	3.41%	3.50%	3.49%	3.99%

Source: INSSE and author's calculations

For year 2021 the total touristic employees in Tulcea region are 3.99% out of the total people occupied with activities (both self-employed and on labour/civil contracts) (Table 2).

Table 3. Employees on labour/civil contracts in Constanţa region.

Employees on labour/civil contracts - Constanţa	2016	2017	2018	2019	2020	2021
Hotels and restaurants	11720	13396	12115	12890	10983	11874
Performance, cultural and recreational activities	1946	2212	2264	2387	2155	2510
Cumulative	13666	15608	14379	15277	13138	14384
Total	167184	175184	175863	181817	175702	180383
In per cent (Cumulative/Total)	8.17%	8.91%	8.18%	8.40%	7.48%	7.97%

Source: INSSE and author's calculations

However, the share of the people busy in the touristic and recreational activities is about 8% out of the total employee working on labour and civil contracts (excluding the self-employed). (Table 3).

Table 4. Employees on labour/civil contracts in Tulcea region.

Employees on labour/civil contracts - Tulcea	2016	2017	2018	2019	2020	2021
Hotels and restaurants	1946	2210	2210	2450	2298	2515
Performance, cultural and recreational activities	338	391	423	417	371	376
Cumulative	2284	2601	2633	2867	2669	2891
Total	43207	44877	45629	46786	45820	46822
In per cent (Cumulative/Total)	5.29%	5.80%	5.77%	6.13%	5.82%	6.17%

Source: INSSE and author's calculations

These data for the Tulcea region also show a higher percentage of personnel working (about 6%) in tourism if we consider only the employment contracts (Table 4).

We can observe a comparatively small employment decline during the COVID years 2020 and 2021. From here it could be indirectly drawn the conclusion that the touristic activities in the Constanța region rely overwhelmingly on local Romanian tourists. (Table 5).

This could be compared to the registered tourists by country of origin for year 2021 that completely confirm this hypothesis.

Table 5. Tourists by country of origin in the Constanța region.

Tourists by Origin - Constanța	2016	2017	2018	2019	2020	2021	2022
Foreigners	60908	62458	62751	65622	12744	37984	45132
Domestic	1102050	1173084	1249667	1314985	991777	1230931	1409759
Total	1162958	1235542	1312418	1380607	1004521	1268915	1454891
Share of Foreign Tourists (%)	5.24%	5.06%	4.78%	4.75%	1.27%	2.99%	3.10%

Source: INSSE and author's calculations

The impact of the COVID pandemic is still visible mainly in the foreign arrivals which decreased both in absolute number (5 times) and in share (4 times) during year 2020.

Year 2021 represented almost a complete recovery of the domestic Romanian tourists while the foreign ones reached only 60% of the pre-COVID numbers and share. This trend is very similar to Bulgaria where the tourist market in the Black Sea region is dominated by foreign arrivals and by foreign tourists in general.

Additionally, it is interesting to compare the average gross salary in the touristic and recreational sectors versus the average gross salary of Constanța region and Tulcea region.

Table 6. Average gross monthly salary by selected economic sectors (EUR) in Constanța region.

Average monthly salary (EUR) - Constanța	2016	2017	2018	2019	2020	2021
Average FOREX EUR/RON	4.4904	4.5688	4.6540	4.7453	4.8383	4.9215
Hotels and restaurants	390.61	405.58	586.38	573.41	588.84	614.85
Performance, cultural and recreational activities	473.90	560.10	764.93	846.31	864.56	826.98
Total	575.90	643.06	843.79	910.80	977.20	966.24
In per cent (Hotels/Total)	67.83%	63.07%	69.49%	62.96%	60.26%	63.63%
In per cent (Recreational/Total)	82.29%	87.10%	90.65%	92.92%	88.47%	85.59%

Source: INSSE, European Central Bank and author's calculations

Table 7. Average gross monthly salary by selected economic sectors (EUR) in Tulcea region.

Average monthly salary (EUR) - Tulcea	2016	2017	2018	2019	2020	2021
Average FOREX EUR/RON	4.4904	4.5688	4.6540	4.7453	4.8383	4.9215
Hotels and restaurants	298.19	386.53	486.31	513.77	545.65	585.59
Performance, cultural and recreational activities	411.99	509.54	708.64	803.53	829.42	815.20
Total	522.89	607.38	812.63	894.15	876.96	956.82
In per cent (Hotels/Total)	57.03%	63.64%	59.84%	57.46%	62.22%	61.20%
In per cent (Recreational/Total)	78.79%	83.89%	87.20%	89.87%	94.58%	85.20%

Source: INSSE, European Central Bank and author's calculations

Another useful comparison is the average net salary in the touristic and recreational sectors versus the average net salary.

Table 8. Average net monthly salary by selected economic sectors (EUR) in Constanţa region.

Average monthly salary (EUR) - Constanţa	2016	2017	2018	2019	2020	2021
Average FOREX EUR/RON	4.4904	4.5688	4.6540	4.7453	4.8383	4.9215
Hotels and restaurants	284.61	296.80	356.90	347.50	355.70	371.03
Performance, cultural and recreational activities	343.62	403.61	459.39	506.40	516.50	493.14
Total	416.67	463.36	510.74	558.66	603.10	616.48
In per cent (Hotels/Total)	68.31%	64.06%	69.88%	62.20%	58.98%	60.19%
In per cent (Recreational/Total)	82.47%	87.11%	89.95%	90.65%	85.64%	79.99%

Source: INSSE, European Central Bank and author's calculations

Table 9. Average net monthly salary by selected economic sectors (EUR) in Tulcea region.

Average monthly salary (EUR) - Tulcea	2016	2017	2018	2019	2020	2021
Average FOREX EUR/RON	4.4904	4.5688	4.6540	4.7453	4.8383	4.9215
Hotels and restaurants	220.02	284.32	295.44	309.57	330.07	352.74
Performance, cultural and recreational activities	301.09	366.40	425.87	483.85	497.49	483.59
Total	379.92	439.72	493.77	546.44	583.06	589.05
In per cent (Hotels/Total)	57.91%	64.66%	59.83%	56.65%	56.61%	59.88%
In per cent (Recreational/Total)	79.25%	83.33%	86.25%	88.55%	85.32%	82.10%

Source: INSSE, European Central Bank and author's calculations

Based on the statistical data we can conclude that both the gross and net remunerations in the hotels and restaurants are constantly about 1/3rd below the average salary (Tables 6, 8) and even less in Tulcea region, whereas the recreational activities are about 1/7th below the average salary (Tables 7, 9).

It is mindful to mention that in the touristic sector the informal tip revenue may be a significant part of the actual remuneration that is not covered by the official statistics. But even if we consider the informal revenue, it cannot be disregarded the huge seasonality in that sector that further decreases the real annual remuneration per employee in these sectors of the economy.

For Constanţa region we have a detailed statistic on the different types of touristic accommodations (Table 10).

They are as follows:

Table 10. Accommodation Beds in Constanţa region.

Accommodation Beds - Constanţa	2016	2017	2018	2019	2020	2021
Hotels and motels	64895	66836	67874	70191	70713	71973
Hostels, inns and tourist cabins	3837	4081	4134	3534	2958	2453
Campsites and cottage-type units	8543	4872	4389	6297	6633	5523
Tourist villas and bungalows	5982	6477	6710	7144	6790	7044
Pupil and preschool camps	1012	1012	1012	1012	1012	725
Tourist guesthouses	569	501	450	635	671	886
Agritourism pensions	253	184	230	470	391	362
Tourist stops	194	194	619	619	136	
Accommodation spaces on ships						26
Total Beds	85285	84157	85418	89902	89304	88992

Source: INSSE and author's calculations

From here we can see that the accommodation capacity in terms of touristic beds in the Constanţa region have been slightly increasing in the last years reaching 88992 beds (Table 10), however, they are still significantly much less compared to year 1990 when they use to be as much as 149442.

Table 11. Tourist arrivals in Constanța region.

Tourists arrived - Constanța	2016	2017	2018	2019	2020	2021
Hotels and motels	1014308	1075242	1149202	1194709	864350	1118807
Hostels, inns and tourist cabins	37555	36881	40772	40138	25544	26208
Campsites and cottage-type units	36151	30496	23266	43932	40177	27236
Tourist villas and bungalows	53536	65535	71314	75424	60197	80911
Pupil and preschool camps	5350	5288	6745	6992		
Tourist guesthouses	9012	8279	8412	12718	8398	12917
Agritourism pensions	2586	1865	2497	5654	4286	2836
Tourist stops	4460	11956	10210	1040	1569	
Total Arrivals	1162958	1235542	1312418	1380607	1004521	1268915

Source: INSSE and author's calculations

The arrivals in Constanța region used to steadily increase before 2019, followed by a 28% decrease during the COVID-torn 2020. However, the recovery in arrivals was quite brisk as early as 2021 (Table 11).

Bulgarian Black Sea coast

Now we are going to compare the previous case with the Bulgarian Black Sea regions which are Dobrich, Varna and Burgas respectively (Tables 12-17).

Table 12. Accommodation beds in the Dobrich region.

Accommodation beds - Dobrich	2016	2017	2018	2019	2020	2021	2022
1* and 2**	7679	8230	7987	8301	6950	6862	7392
3***	12195	14086	12985	12115	6638	10612	8551
4**** and 5*****	8548	10110	9560	9372	7619	9321	13216
Total	28422	32426	30532	29788	21207	26795	29159

Source: NSI (National Statistical Institute of Bulgaria) and author's calculations

The Dobrich region has rather stable accommodation beds availability throughout the last decade (Table 12). Dobrich region is dominated by the centrally managed resort Albena offering more than 50% of the accommodation capacity. Smaller resources in the Dobrich region are Rusalka and Tuzlata as well as 3 golf-dedicated complexes such as Black Sea Rama, Thracian Cliffs and Lighthouse. Other important touristic places are Balchik, Kavarna, Shabla, Kranevo, Durankulak, Rusalka, Balgarevo, Kamen Bryag, Tyulenovo and Krapets. One of the most interesting landmarks in the entire Black Sea is the Kaliakra Cape which has important historical significance in the Bulgarian history and outstanding outlook to Black Sea. Due to the rocky nature of the area around Kaliakra the fine sands are missing, situation which significantly increases the sea water transparence. That is the reason which makes Kaliakra comparable to the Mediterranean in terms of transparence. However, the access to the beaches in the area is not very easy due to the steep terrain around the cape.

The potential of the Dobrich region could be unleashed by the development of the Balchik Aiport opened in 1935 during the Romanian rule of South Dobruja. This will definitely reduce the time for the international tourists to reach the resorts north of Balchik which are currently more than 70 km far away from Varna airport that serves Dobrich region for the time being.

More capacity of touristic infrastructure could be developed in the sub-region between Kaliakra Cape and Vama Veche. Currently not that much investment is directed towards this particular sub-region due to the perception that it is with colder and windier weather making the summer season kind of shorter. But on the other hand, just across the border on the Romanian territory, there are several lively resorts, so the weather conditions are more kind of a Bulgarian perception rather than some real bottleneck.

Table 13. Accommodation beds in Varna region.

Accommodation beds - Varna	2016	2017	2018	2019	2020	2021	2022
1* and 2**	17035	18015	18217	17294	14485	13401	13330
3***	14788	15506	15662	15472	10063	11768	11694
4**** and 5*****	35738	36870	38264	38784	30074	34430	37177
Total	67561	70391	72143	71550	54622	59599	62201

Source: NSI and author's calculations

Varna has a symbolic position in the UK market, but it is significantly expanding its presence in Romanian and Polish markets. The destination is experiencing a shrinking of its positions in the main market for sea holiday tourism in Europe and the world, which is Germany. In 2019 Germany was overtaken by Romania in terms of relative share in overnight stays in the destination of Varna.[1]

The accommodations beds in the Varna region are in stagnation for the last 10 years but it can be noticed that the trend was slightly positive until the pre-COVID year 2019 and afterwards followed by a sharp decline in year 2020. While year 2021 and 2022 registered a noticeable improvement in the accommodation beds supply, the capacity had still not reached the pre-COVID numbers in year 2022 (Table 13).

Varna region contains several resorts, the most important of which is Varna city itself – the biggest city for the entire Western Black Sea coast. The tourism in Varna is well developed and recognized in Europe since 1920. There are 2 other important resorts such as Golden Sands which is the second biggest specially designed resort in Bulgaria as well as the oldest Bulgarian sea resort Saint Constantine and Helena. Smaller resorts are Sunny Day and Kamchia.

Other important places in Varna region are Shkorpilovtsi and Byala.

The potential for improvement and growth of the tourism in the Varna region is both in terms of quality and quantity. The quality can be improved by ameliorating the conditions for the staff and, therefore, increasing their motivation and their engagement as well as improving of the food quality. Aside from the measurable factors, important is also the role of service quality and the way professionals (e.g. tourist guides) coordinate their work with all other stakeholders, radiating the comfort of their respected and established place in a complex tourist system[2] towards the visitors.

The potential for capacity increase is mainly in the southern Varna region where the accommodations may be significantly increased.

Table 14. Accommodation beds in Burgas region.

Accommodation beds - Burgas	2016	2017	2018	2019	2020	2021	2022
1* and 2**	34581	40784	31543	33667	26308	27994	34496
3***	35220	33748	34314	35462	24523	25268	31643
4**** and 5*****	57275	59804	64008	65282	48873	61901	75731
Total	127076	134336	129865	134411	99704	115163	141870

Source: NSI and author's calculations

Unlike the regions of Tulcea, Constanţa, Dobrich and Varna, the region of Burgas seems to show a positive trend in terms of accommodation capacity, only briefly interrupted by the COVID pandemic that loomed over the sector in years 2020 and 2021 (Table 14).

The explanation for this increase is that Burgas region is numerically larger in terms of coast lengths; also, a well as significant part of the region is flat, making easier the access to the sea and the development of new construction projects respectively.

Additionally, there is a perception by the business that the tax office is somehow more relaxed in Burgas regions compared to Varna and Dobrich, which allows higher margins and, therefore, attracts more

1 Marinov 2022, 8.
2 Nedialkova 2020, 68.

entrepreneurship in this southern Bulgarian maritime region compared to the aforementioned neighbour regions further north.

A further reason for the outstripping development in Burgas region could be the fully completed in year 2013 400-km long highway to Burgas connecting it easily and rapidly to the largest and strongest economically cities in Bulgaria such as Sofia, Stara Zagora and Plovdiv.

In this regard Burgas is comparable more to Constanța which has also been connected to Bucharest with a completed 200-km long highway since year 2012.

In the Burgas region is located the largest specially developed resort on the Western Black Sea – Sunny Beach which dominates over the tourism in the region of Burgas.

Other important touristic places are Nessebar, Sozopol, Primorsko, Obzor, Pomorie, Burgas, Saint Vlas, Kiten, Elenite, Tsarevo, Ahtopol and smaller places such as Sinemorets, Chenomoretz, Rezovo and Irakli.

The potential for development of the Burgas region is mostly reached and there is not a significant potential left for a further numerical expansion of its accommodation capacity.

All the three regions Dobrich, Varna and Burgas experienced decline in the beds supply during the COVID pandemic which means that less hotels opened at all. This seems different from the Romanian Black Sea coast where no clear COVID trend has been noticed during this period.

Table 15. Tourists by country of origin in Dobrich region.

Tourists by Origin - Dobrich	2016	2017	2018	2019	2020	2021	2022
Foreigners by abroad	252888	296166	320235	304692	112257	167969	206010
Domestic Bulgarians	140005	149179	160814	171672	128884	152535	168862
Total	392893	445345	481049	476364	241141	320504	374872
Share of Foreign Tourists (%)	64.37%	66.50%	66.57%	63.96%	46.55%	52.41%	54.95%

Source: NSI and author's calculations

Dobrich Region is clearly dominated by foreign tourists that pour mainly into Albena, Balchik as well as the 3 golf resorts. The only exception of this tendency is the COVID year 2020 when the Bulgarians slightly outstripped the foreigners (Table 15). The reason behind this observation in year 2020 is that the COVID restrictions for Bulgarians going abroad were a significance impediment due to a low vaccination rate as well as an increased coast for PCR tests required by most countries at that time.

Table 16. Tourists by country of origin in Varna region.

Tourists by Origin - Varna	2016	2017	2018	2019	2020	2021	2022
Foreigners by abroad	773075	794031	871642	871875	248855	478180	660942
Domestic Bulgarians	336236	347541	346361	359588	281713	338721	348766
Total	1109311	1141572	1218003	1231463	530568	816901	1009708
Share of Foreign Tourists (%)	69.69%	69.56%	71.56%	70.80%	46.90%	58.54%	65.46%

Source: NSI and author's calculations

The Varna region significantly replicates the development of Dobrich region but only at a larger scale due to its bigger capacity developed throughout the years (Table 15, 16).

Table 17. Tourists by country of origin in Burgas region.

Tourists by Origin - Burgas	2016	2017	2018	2019	2020	2021	2022
Foreigners by abroad	1088150	1141920	1220998	1312773	271055	646842	1065168
Domestic Bulgarians	491000	477038	482498	561602	563717	711047	755973
Total	1579150	1618958	1703496	1874375	834772	1357889	1821141
Share of Foreign Tourists (%)	68.91%	70.53%	71.68%	70.04%	32.47%	47.64%	58.49%

Source: NSI and author's calculations

The Burgas region is the only region that did not experience decline in the Bulgarian tourists during the pandemic. Moreover, the Bulgarians managed to achieve a significant numerical advantage in year 2020 compared to the foreign tourists (Table 17).

This observation can be explained with the facilitated automobile access to the southeastern Bulgarian maritime region mainly from people arriving from West and South Bulgaria that could otherwise go with their own cars to the Mediterranean and the Adriatic. The COVID regimen in Bulgaria was in general more liberal compared to abroad and, therefore, Bulgarian tourists, who traditionally used to go abroad, simply substituted their preferred foreign destination with the domestic market. The increase of domestic tourists in 2020 was observed only in relative term and not in absolute numbers due to the general fear from the illness back then and the COVID restrictions in place for the entertainment objects such as discotheques, restaurants and trading centres that were negatively impacting the holiday experience of Bulgarians on the Black Sea.

On the other hand, it is noticeable that in all three regions of Dobrich, Varna and Burgas the foreign tourists dropped as a cliff up to 3-4 times in year 2020. This hit badly the foreign-oriented touristic companies operating in Bulgaria causing not only drop in revenue and customers, but significant losses, redundancies and dissatisfaction amongst the professionals employed in the tourism. Dwindling income might turn key professionals into marginal actors used for mere "functional problem solving" instead of efficient destination mediation and high-quality service.[3]

CONCLUSIONS

The potential of the Romanian Black Sea seaside seems rather unreached especially in comparison to the time before year 1990. The Bulgarian Black Sea seaside relies much more on foreigners which used to be 2/3rd of the total tourists before the pandemic. After year 2020 the Bulgarian Black Sea coast has been hosting less tourists from abroad, however, this is partially offset by increased domestic Bulgarian tourists.

While the same trend with the decline of foreign tourists has also been experienced in Romania, due to their rather small share of less than 5%, this was not impacting the overall touristic performance on the Romanian Black Sea coast.

The significance of foreign tourists in Bulgaria, however, severely hit the Bulgarian touristic employment market, whereas in Romania the pandemic impact on the labour market used to been rather minor – single-digit employment reduction combined with stagnant salaries.

The touristic capacity seems quite similar in Varna and Constanţa, while Burgas is the undoubted leader on the Western Black Sea coast. Dobrich has also developed a significant capacity but ranks 4th among the maritime regions studied. The biggest landmark of Tulcea region is the natural reserve of Danube delta that attracts more different type of tourists than the mainly sea tourists pouring in the other four regions observed. It could be beneficial to improve the flight capacity with charter flights to and from the airports in Balchik and Constanţa, so that to bring more foreign tourists in the regions of Northern Dobrich and Constanţa, both of which have definitely more potential than their current performance.

Bulgaria has managed to develop a higher capacity and market share due to natural facts and more importantly due to significant funds diverted from the interior and invested on the Black Sea coast in the last 100 years. Especially noticeable is the divergent development between Bulgaria and Romania after the fall of communism when Bulgaria in essence destroyed much of its production sector and diverted enormous funds to increase and refurbish the touristic capacity on the Black Sea coast. Romania, on the other hand, has been preferring more continental development preserving much more of its industrial capacity and not investing overly on improving its touristic and hotel infrastructure on the Black Sea, approach resulting in its reduced accommodation capacity and decreased arrivals compared to 30 years ago.

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[3] Nedialkova 2020, 68.