

Eastern Promises: The Potential Future for Wine Tourism in the Balkans

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Abstract The Balkan countries have become a new focus for international wine writers. The dozen nations that lie totally or partially within the Balkan Peninsula are culturally and politically diverse, but all share in a millennia-old love of wine and its production. More than 400 autochthonous varieties of wine grapes are grown on the peninsula. Some, such as Plavac Mali, Zelenac and Vranac are basically unknown in the rest of the world but produce fine wine in most of the Balkan nations. There would appear to be an immense potential for greater development of wine tourism in the region, which with time could become a boon to its new market-based economies. This paper, based on visits to Balkan wineries and interviews with wine makers, academics and other leaders in the wine and wine tourism industries, is a survey of the present tourism infrastructures, the wine trade organizations and regional wine histories. It explores the capacity of wine industries to develop tourism as a component of their operations. In the end, suggestions are made that may help develop the Balkans as an international wine destination.

Keywords Wine tourism, Balkan national economies, Tourism development

1. Introduction

The Balkan Peninsula has for millennia been the cultural connection between Central Europe and Asia Minor. Because of its fortunate position and generally mild climate, it has been a focal point for technology and valuable crops traveling between the continents. *Vitis vinifera*, the predominant European wine grape, is likely the most important crop to find a home there. Balkan residents were among the earliest to cultivate it, nearly 6,000 years ago. Today, the hundreds of varieties of wine produced by people living in the dozen countries on the peninsula help to define their various identities, ethnicities and religions. A Balkan nation's wine may be one of the best identifying characteristics of its culture. It is impossible to overstate the importance of wine to the region, which, if considered as a whole, would be the fifth-largest wine producing area in the world.

Increasingly, the migrations through the Balkans consist of tourists. They contribute to economic development and, in some cases, to the recovery of recently war-torn economies. Tourism in the Balkans may be able to capitalize on a growing international interest in winery and vineyard visits. This new "enotourism," offers great potential for the creation of wealth and the celebration of national pride in the region.

This paper surveys wine tourism in major Balkan wine-producing nations using available government, public and industry data, initial survey interviews and first-hand observations. Using a list of criteria and measurements, it attempts to assess the prospects for wine tourism in these regions. Finally, the paper suggests possible changes that might enhance wine tourism for many of the countries.

2. The Balkans

The Balkan Peninsula is generally defined as all regions lying south of the northern slope of the Balkan Mountain Range. It is often considered to include parts (or all) of Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Greece, Kosovo (disputed status), Republic of Macedonia, Montenegro, Romania, Slovenia, Serbia and the Thracian portion of Turkey. For the purpose of simplification, Greece and Slovenia were not included in this survey. Both have healthy tourism industries, and Greece has rapidly been moving into the wine tourism sector. The author did not collect sufficient data on Kosovo, Bosnia-Herzegovina and Albania to include them in this survey although a potential exists for wine tourism in these nations as well.

Seven countries were included in this survey: Bulgaria, Croatia, Macedonia, Montenegro, Romania, Serbia, and Turkey. They have similarities in their geography, viticulture, and linguistic/historic background that unite them as a larger wine producing area.

Geographic Similarity: Most of the Balkan states have both continental interiors that favor white wine varieties and

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coastal (littoral) regions where both red and white wine grapes are grown [1].

Viticultural Similarity: Most Balkan states have shared their indigenous varieties across borders. Grape varieties such as Plavac Mali, Zelenac and Vranac are grown in most of the Balkan countries [2]. While each country has its own favorite grape varieties, the overlap in what is grown is extensive.

Linguistic/Historic Similarities: Most of these nations speak one of the Southern Slavic languages and dialects, many of which are mutually intelligible. The exceptions to this are Romanian, a romance language, and Turkish, part of an isolated language family. Because of their locations near long-established trade routes between Asia and Western Europe, cultures of the Balkans have a history punctuated with regional domination by the Ottomans, Russia, and the Soviet Union. Out of the ashes of recent conflicts (the “balkanization” of Yugoslavia and disintegration of the USSR) [3] these nations are emerging into the world economy to become competitors in the wine and tourism industries.

3. Wine Tourism and Its Development

Wine tourism has existed in the modern world for a century and a half, starting with the “Grand Tours” taken by the burgeoning middle classes in the United States and Europe in the latter-half of the 19th century [4, 5]. German wine trails have been delineated and followed by tourists since the 1920s. Wine tourism, referred to as enotourism by many in the industry, has been popular in the United States, France and Australia since the 1950s [6, 7]. Wine tourism as defined by Hall et al. (2000) is “visitation to vineyards, wineries, wine festivals and wine shows for which grape wine tasting and/or experiencing the attributes of a grape wine region are the prime motivating factors for visitors” [8].

However, the reasons for, and the format of, that wine tourism has changed greatly over the past two decades. Where wine tourism in the past served as an inexpensive means of brand marketing, today it provides a form of direct-to-customer sales that allows small and boutique wineries to survive in a very large and aggressively competing industry. Today’s come-as-you-can format is one that welcomes single family visits to wineries without appointments. This form of wine tourism became the most common form in the United States and Australia in the late 1970s and has recently been accepted by many wineries in France. It is different from the “prearranged appointment” visit that has been the traditional protocol practiced by European wineries since the invention of the tour bus.

The come-as-you-can wine tourism format requires that a winery tasting room be manned and open for normal business hours most every day of the week. From the tourist’s perspective, it allows for a small group (in a single automobile rather than a tour bus) to show up on its own schedule. This “client-focused” form of commerce fits with

the American and Australian cultures of individuality as well as the new, more independent European concept of tourism. It also tends to bring in more tourist dollars to the wine region as a whole, as meandering wine tourists are more likely to stay the night near the wineries and eat and shop in the region. Although the traditional “appointment required” system is still practiced in many Balkan wineries visited for this study, in the more Western-oriented wine regions, visitors without appointments are being received more and more often.

No accurate data has been published on a comparison of these two tourism systems, but where it is employed, the come-as-you-can form of wine tourism results in more traffic to the winery, although possibly fewer sales of wine per-visitor than the “appointment required” protocol. Come-as-you-can wine tourism allows for last-minute decisions by the visitor and a greater number of visits per winery. The authors Igor Jurinčič and Štefan Bojnec have spoken to the difference in small estate wineries in the Goriška Brda wine district in Slovenia that borders Italy.

The ability of winery to dedicate a person to handle visitors can explain the level of tourism business development in the winery. About 65% of the owners of the wineries are of the opinion that visitors should announce their arrival in advance. Only 15% wineries are of the opinion that somebody always has to be available to service visitors [9].

In both systems, there is usually a fee that helps cover the tasting and any tour of the winery. Important here is that for the small winery, tourists represent a large proportion of the winery’s profit through direct sales. Because wines are sold at a retail price in the winery, the profit margin is greater than for wines sold to a negotiant, distributor or a restaurant.

For large wineries, tours and visits represent a smaller contribution to total income. But for a few medium to large wineries, including some of the world’s largest producers, this tourist trade serves a second purpose as a marketing device that convinces the everyday wine drinker that these wines are the best choice for future purchases [10].

Wine tourism represents a boon to the tourism of a region in general. Visits to wineries result in expenditures on non-wine businesses—restaurants hotels, spas, sales of other commodities, and visits to national historic sites—that are many times greater than expenditures on wine [11]. For this reason, where wine tourism is practiced in the Balkans, there appears to be both the potential for an increase in tourism in general and a healthier wine industry.

4. Review of Literature

An intense international interest in wine tourism has sprung up among academics during the last decade. In the Balkans, the analysis of this new industry has focused on tourism distribution channels in Romania [12], regional benefit analysis for northern Greece [13], seasonal effects on wine tourism on the Black Sea coast of Bulgaria [14], the

enhancement of wine tourism through festivals and exhibitions in Croatia [15], and a SWOT analysis of the potential benefits of wine tourism in northern Serbia [16].

A realization of the importance of wine tourism to Balkan rural development is outlined by Kesar and Ferjanić, who wrote “[t]he most promising issue about the wine tourism is its potential to contribute to sustainable rural development and self-employment” [17]. Using a SWOT analysis, the authors noted that one of the threats to wine tourism in the continental region of Croatia is “resistance of remote rural communities to tourism development,” an attitude that will be discussed at length later in this paper.

Another excellent review of wine tourism on the edge of the Balkan Peninsula is study by Igor Jurinčič and Štefan Bojnec of the Slovenian wine region bordering Italy [18]. Similar to the results of this Balkan survey, most of those wineries were recent entrepreneurs to the wine industry while a few larger ones dated back to the communist era. Slovenia’s precocious status in wine tourism, as mentioned above, is the result of its advantage of learning from neighboring Italy’s decades of enotourism experience.

Of course, one of the greatest barriers to the success of Balkan wine tourism is the lack of regional wine recognition by the rest of the wine-drinking world. Brown and Getz bring this fact to bear in their statistically relevant article [19]. However, it is expected that, as more Europeans and Americans seek new wine frontiers, they will not only visit these artisanal wine producers but will also publicize their “new” varieties of wine.

This study, like the majority of those cited employs qualitative methods. It is a review of the history of the Balkan wine industry, a survey of where it is today, and an assessment of its potential in the future. It is hoped that these observations and suggestions will be helpful as the Balkan region decides how it wants to manage its potential.

5. Methods

5.1. Criteria to Measure Successful Wine Tourism

The wine tourism researcher Donald Getz [20, 21] has suggested criteria in wine destination development that can help to insure successful wine tourism in a region. This survey employs many of those indicators—travel infrastructure, wine industry organization, local attractions, services, hospitality training—combining them with political and legal issues, and historical development of the wine industry. All of these criteria have been organized into larger categories to help analyze each Balkan country’s future potential for wine tourism.

These larger categories include

- a nation’s history of wine production and its governmental involvement in that industry,
- the geographic proximity of a nation’s wine regions to its capital, to other tourism attractions, and to Europe,
- the present-day size and economic health of each

nation’s wine industry and wine tourism industries (*included with the above section*),

- the nation’s infrastructure (roads, signage, hotels, restaurants, tourist attractions, etc.), and wine-associated institutions or events,
- the prevalence of foreign-language skills among winery workers (in addition to the availability of language programs that winery workers have access to) and availability of wine education to tasting room personnel.

In addition to these categories there is a quality that is more difficult to evaluate but possibly the most important for the future success of enotourism: the attitude of the wine industry and local population, toward tourism, entrepreneurship and economic cooperation.

Attitude in this study was evaluated by the degree to which winery owners, workers and researchers favored three approaches to development: passivity, group cooperation and independent entrepreneurship. Passivity, here is described as an expectation that the government should be the facilitator of change. Independent entrepreneurship is the expectation that one can only facilitate change by oneself and for oneself. Group cooperation is the expectation that groups can facilitate change and the willingness to work as a group. These are not mutually exclusive attitudes. Interviewees sometimes held passive attitudes about road improvement while also holding cooperative or independent attitudes about the creation of signage.

Attitude has an impact on each of the other categories, and so it is frequently mentioned in relation to them. In itself, attitude also needs special consideration and is therefore mentioned at the end of each country survey.

5.2. Data Collection

The researcher conducted semi-structured interviews with 62 Balkan wine- and tourism-industry workers and researchers. This method, frequently used in qualitative research, provides for the consistent exploration of key themes while also allowing for spontaneous probing of new issues as they arise in the conversation [22]. In addition, the researcher conducted a small preliminary survey of wine educators. The following is summary of findings, listed according to the categories outlined above.

5.3. National Histories of Wine and the Influence of Government on Wine Tourism

The history of each Balkan nation’s wine industry has contributed enormously to the present-day status of its wine production and to its wine potential for future wine tourism. Wine production on the Balkan Peninsula dates back to the archaic era of early Greece, but in most Balkan regions, its development was interrupted in the 16th century by Ottoman Suzerainty [23]. Not until sometime during the 19th century did wine again become a major export in those nations, but by the end of the century, the peninsula’s vineyards had been decimated by the deadly vine pest, *Phyloxera* [24]. Nations most closely associated with France and Russia recovered

the quickest.

In the 20th century, much of the peninsula's wine industry was dominated by Russian influence, beginning with the communist period after the Second World War of large-scale production in both Yugoslavia and in the USSR-aligned nations. The enormous Russian and Ukrainian demand for wine started in the 1930s and continued to boost Balkan production until Premier Mikhail Gorbachev waged a war on alcoholism. His decree reversed a half century of growth and resulted in the drastic reduction of vineyard land in Bulgaria and Romania [25].

Possibly the most cataclysmic event for the Balkan wine industry was the disintegration of Yugoslavia with its resulting Balkan wars, in concert with the realignment of Romania and Bulgaria after the dissolution of the Soviet Union. Wine production lapsed in this period, and vineyard lands were destroyed or reallocated along new borders [26].

With the arrival of a new entrepreneurial capitalist economy, the large, out-of date socialist wine plants and cooperatives left over from the days of Soviet mass-production of wine were a misfit for the higher quality wine that the world was now demanding. The process by which these winery behemoths were integrated into the new national economies remains an important factor in the success or struggle of several of Balkan nations' wine and tourism industries today [27]. In some cases, those who took over these means of production, overpowered and perhaps stifled independent entrepreneurship. Bulgaria, Montenegro, Serbia and Macedonia were most affected by the advantage awarded to large government wine entities that either continued under government control or were sold to private investment groups that now dominate the wine markets in those nations. Where the healthy growth of small entrepreneurs exists, wine tourism seems to be more successful.

Most of the wine-producing Balkan nations covered in this article have government-affiliated agencies that promote wine tourism, but they are often severely underfunded. This survey found that most Balkan countries have reversed repressive controls on wine production left over from the end of the Soviet era, and in turn, support wine tourism. Only in the case of Turkey has a government supported the international marketing of its wines while at the same time passing legislation that hampers wine sales within its borders.

5.4. Wine Regions and Geographic Influences

The value of farm land in a wine region is usually a reflection of the quality and value of its wine. Wine regions in Europe are delineated by their soils and grape varieties [28]. The cherished turfs of Champagne, Rheingau and Napa Valley are the most expensive farm lands in the world today, while more remote vineyards in Romania Macedonia and many other Balkan wine regions can be purchased for one one-hundredth the price. Likewise, the success of wine tourism depends on soils and climate, but it depends even

more on accessibility.

It is safe to say that the Napa and Sonoma valleys would not have three million visitors each year if [29], instead of San Francisco, they were 45 minutes from De Moines, Iowa. Being near a major metropolitan area is important in bringing tourists to a winery and boosting its on-site sales. In the Balkan wine region, proximity to Central Europe may be the best stimulus for wine tourism.

To reach the Balkans from Central Europe requires only a two-and-one-half-hour drive from Vienna to Budapest. When an autobahn is eventually finished through the peninsula, ten of its wine regions will be connected to Central Europe by a non-stop half-day's drive. For now, however, the most direct route through the Balkans, from Budapest to Thessalonica requires 12 hours of driving.

Central European tourists can fly to most Balkan capitals (although those from Asia or the United States will find direct flights to a few places other than Istanbul). The ease-of-access problem arises again when the tourist wishes to visit a Balkan nation's wine region from its own capital. Only Romania and Croatia have superhighways connecting any of their premier wine regions with their capitals.

Wine tourism is generally bolstered by the proximity of non-wine tourist activities, such as beaches, national parks and historic places. Ferry lines that connect the Adriatic coasts of Croatia, Montenegro and Albania with Italy have begun to play a role in Balkan wine tourism. The same commerce has not yet developed on the Black Sea. The Balkan wine regions that border the Danube River have benefited from tourist traffic off the river. This includes wine regions in Croatia, Serbia, Romania and to a lesser extent, Bulgaria.

Interviewees working in wine tourism cited the completion of major motorways and an increase in the number of air carriers landing in Balkan capitals as essential to the growth of their sector [30].

5.5. Infrastructure

Interviewees also stressed the importance of improving infrastructure in the form of roads, signage, hoteliery and culinary opportunities. Croatia, which has recently joined the EU, exemplifies such development. Its modern highway system, which is presently being finished, along with a modern hotel/spa trade and larged culinary arts sector is comparable to Europe in quality for international wine tourism.

Signage is often a problem, even in places where wine tourism is well established, such as Washington State [31]. For the Balkans, better signage is necessary if come-as-you-can wine tourism is to develop. Multilingual signs have proven very successful in the regions where they have been employed: Montenegro, Croatia and parts of Serbia. Where signs are written in both Roman and Cyrillic alphabets, less confusion prevails.

Many Balkan wine regions have a rich history of annual wine festivals centered around the harvest and spring

agricultural events. These festivals are usually overseen by local town authorities rather than an organization of wineries in the region. Such festivals create a potential for winery visits by the tourists who come for the festivities [32].

Regional wine museums may also draw tourists; however, many of these are tied to a particular winery rather than to an association of wine producers. This is also the case with France's Bordeaux Wine Trade Museum or Italy's Museo del Vino a Barolo. Although wine museums that are tied to a particular winery are commonplace throughout the world and can be said to promote the industry in general, museums associated with broader coalitions appear to create more local pride.

5.6. Language Skills and Wine Education

For good or bad, English has become the second language of most E.U. countries [33]. It also has been adopted as the lingua franca of most Balkan nations, but the level of bilingualism varies greatly among the countries and within each country. Russian is still spoken by many of the generation older than 40 years of age in many wine regions and especially in Bulgaria and Romania. Even in those nations, Russian is rapidly being supplanted by English. For wine tourism to flourish in the Balkans, there is a need for greater bilingualism.

In order to sell wine to the larger public, even small regional wineries must look for workers who not only speak English but also but speak the language of wine. Sommelier and wine technology programs for people who will work at lower-level positions in the wine industry are just now being realized in some Balkan universities. They are essential for wine tourism growth.

5.7. Attitudes of Industry Personnel

The attitude of industry personnel is essential to the success of a modern wine tourism industry. During a half century of socialist industrial wine production, many of the laborers in Balkan wineries and vineyards assumed their employment was guaranteed. In several interviews, both academics and winery officials complained of a lingering attitude that the "right to employment was assumed" regardless of an employer's need or a worker's efficacy. Wine industry supervisors and wine program leaders often blamed this on attitudes left over from the days of socialism, where minimal work produced sufficient food and shelter, and over-industriousness suggested individual competitiveness that was seen as threatening [34].

In a post-communist era, with its new opportunity for individual entrepreneurship, it is not surprising that many Balkan winery owners eschew formal cooperative arrangements within the industry, such as regional wine associations and wine trails. The organization of wine trail associations and similar cooperative wine tourism has been slow to develop on the peninsula [35].

In addition to the expectation of workers yearning for the old socialist cooperative system there is the paradoxically

dysfunctional effect that the new market system has had on those eager entrepreneurs who wished to excel after the break-up of Yugoslavia. Reacting against the earlier forced cooperative economy in which they were raised, many of these business leaders have morphed into an image of "John Wayne individualism" that declines offers to cooperate with fellow winery owners in ventures such as wine trails, wine festivals, and equipment sharing, even when synergistic advantages are obvious [36].

6. Findings: Wine Tourism Region by Region

6.1. Bulgaria

History and Government Influence

Wine making in Bulgaria probably started 2,500 years ago in the Thracian era and continued to expand through early Christian domination. The arrival of the Ottoman Empire at the end of the 14th century reversed that trend, and its impact lasted until just 150 years ago [37], when wine production returned to Bulgaria. By the end of the Soviet era in the 1980s, Bulgaria was awash in cheap wine, producing than 4.5 million hectoliters per year (more than Austria and Switzerland combined). During those heady years, Bulgaria supplied the Soviet Union and much of Europe with cheap Cabernet Sauvignon. Bulgaria's success with cheap wine even attracted investment from beverage giant Pepsico [38, 39]. It has since changed its approach, focusing more on quality than quantity and ripping out many of its vines in order to limit production. At 20th place in the wine world, Bulgaria produces a variety of European and native grapes well suited for its mostly continental climate. But conversion of the old industrial wineries has been slow, and Bulgaria has yet to reach its potential.

Wine Regions and Geographic Influence

Bulgaria's wine production is divided into five basic districts with a numerous smaller ones in remote locations. Winemaking in the Thracian district (Trakia Plain), which borders Turkey, probably dates back to pre-Roman times [40]. This district is Bulgaria's largest producer today and home to 35% of the country's vineyard land. The Black Sea coast and plains produce an additional 30% of the country's wine grapes and more than half of its white wines, including the native Dimyat and floral European varietals such as Riesling, Muscat Ottonel, Ugni blanc, Sauvignon blanc, Traminer, and Gewürztraminer. These two wine regions have the greatest potential for wine tourism in Bulgaria. Both have a major motorway connecting them to Sofia, the capital. Large wineries such as Katarzyna estate, Rumelia winery, Terra Tangra winery and Telish's Castra Rubra and have sprung up along the expressway to Istanbul. Despite this, when contacting these wineries on line one senses a lack of come-as-you-can wineries for a healthy wine tourism to thrive in these regions [41].

The Danubian Plain district in the north produces an

additional 30% of Bulgaria's wine crop, mostly as a result of the century-old Lovico Suhindol winery. However, being on the northern slope of the Balkan Mountains gives this region a distinct disadvantage during exceptionally cold winters that result in extensive winter kill of the vines. This region grows a variety of grapes including the native reds, Pamid and Gamza (Kadarka in Hungary). It also has the only wine museum in Bulgaria, sponsored by Chateau Kailaka wines [42].

In the center of the country, running east to west between two Balkan mountain ranges, is the Rose Valley, which produces a variety of sweet and dry wines. (Rose oil is an even larger export product of this region.) This rather remote district includes the Sungurlare Valley, famous for its wine from the Red Misket grape. The large Soviet-era Vinex Slavyantsi dominates the region, and wine tourism has not yet developed.

Finally, the Struma River Valley is part of greater Macedonian peninsula. It specializes in Shiroka Melnishka, the "broadleaf vine of Melnik" [43] variety, named after an archaeological city. This district is Mediterranean in climate and appeals to Central European tourists interested in classical archaeology. The large Damianitza winery, as well as several of medium production, have opened along the highway from Sofia to Thessalonica, Greece, but most are concerned with wholesale production and not wine tourism. Yet, because of Central Europe, Russian and Romanian tourist migration to the south, this region has the greatest potential for wine tourism.

Infrastructure

"Since Bulgaria has entered the EU, the streets have been constantly torn up," commented one winery worker [44]. This common complaint was echoed in many interviews in Bulgaria and Romania. Most Bulgarian roadways seem to work against getting the tourists to the wine regions with ease. Only the expressway to the Black Sea is finished, while the motorways to Trakia and the Struma River Valley are punctuated with poor or unfinished pavement. Quality hotels, spas and outdoor sports venues exist throughout the country, but there seems to be a lack of marketing synergy between the hotels and wineries in each region. Signage for some of the wineries in the north is totally lacking.

From descriptions by Ivanov and Dimitrova organization in the tourism industry seems chaotic and powerless at best. In a SWOT analysis of the industry they describe some of the weakness as "poor infrastructure, unfinished highways, lack of regional planning, lack of social tourism, and lack of financial incentives for tourism" among others [45].

The worst problems result from the lack of good roads for connecting quite eloquent wineries one to another for wine tourists. The head of the Bulgarian Wine Academy Vili Galabova has described this disjointedness along the Trakia region in another way: "these small puzzle parts are not assembled into a bigger picture. For now the infrastructure is still missing... the paradox is that if you travel through Greece, that is leave Bulgaria, and then enter back from

Greece ...the road is much better, it will take you shorter time than if you decide to go through the country road" [46].

Language and Education

Outside of Trakia, English is rare in the wine regions. It is more common among the youth of the country than among those over forty years of age, who often speak Russian as a second language. The author witnessed a positive attitude toward entrepreneurship and hard work among winery workers as well as an understanding of wine terminology and the international wine market in the wineries he visited. The International University College in Sofia offers a course in Food and Beverage Management. There is also the Bulgarian Wine Academy which offers courses in Sommelier and wine tasting activities.

Attitude

In the Danube region, the most common complaint registered among winery personnel who were interviewed was the failure of the government to help tourism, such as, to keep the roads to wineries open the year around [47]. Wineries in the region receive visitors off the river and occasional bus tours from Central Europe. However, there seems to be little collaboration between hotels and wineries to accommodate the non-appointment, come-as-you-can tourist. Adequate signage is lacking for most wineries here and throughout the wine regions of Bulgaria.

In interviews, winery personnel said that the government should make greater efforts to encourage and assist the 90-plus smaller wineries of the country. The well-funded wineries that have taken over the large Soviet-era holdings may have an unfair advantage at this time over the small entrepreneur wineries. At this time there seems to be a lack of cooperation among wineries, except along the Turkish border where a possible inter-country (Bulgaria-Turkey Greece) wine trail is being considered (see end of article).

6.2. Romania

History and Government Influence

Romania is the largest wine producer in the Balkans and 12th largest in the world. Its history of winemaking, like that of Bulgaria, dates back to early Greek influence, although no archaic wine sites have yet been found in Romania. Romania associates itself with Western Europe in language and culture and, in this way, it differs from its surrounding Slavic neighbors.

However, like its southern neighbor, Bulgaria, Romania saw its wine suffer under the "quantity over quality" demand from Russia during the 1960s and 1970s. It was less affected than other Balkan nations were by the economics of Gorbachev's war on alcohol; cheap Romanian wines were the darlings of British importers at the end of the Communist era and would have continued as such except for the revolution [48].

Since the bloody overthrow of the government in 1989, followed by a decade-long downward fiscal/social spiral, the Romanian wine industry has revived, but changes to its

viticulture have been slow. The 1989 revolution required that large swaths of state-owned vineyards be returned to their pre-communist owners. More 180,000 hectares of vineyard land had to be returned, and in many cases the original owners could not be located [49]. This left a mosaic of vineyard land, with many plots not cared for or propagated.

In 2007 Romania entered the E.U. with a wide variety of grapes and a rusty collection of antiquated wine machinery. The state stepped in to shore up the industry by forming Vinexport, a venture that handles 80% of Romanian wine exports. It is owned 10% by the state, 40% by the wineries and 50% by companies in Holland, Denmark, Germany and England. The difficulty has been finding investors to purchase antiquated production facilities and replant the questionably-owned vineyards [50].

Wine Regions and Geographic Influence

Romania lies on the same latitudes that run from Burgundy to Rioja, a fortuitous position even with a continental climate. Its southern flank, which follows the north bank of the Danube to the Black Sea grows most of the country's vines. Many of these were originally imported from France and Italy. Romania also has some native varieties that are becoming better known in the wine world and may become the next "hot grapes" for those searching for alternatives to Chardonnay and Riesling. Tămâioasă, referred to as the "frankincense" grape, is a floral white that, along with the country's botrytized Grasă de Cotnari, has been particularly successful.

Romania is formally divided into seven large viticultural districts; however, the smaller regions within each district, such as Cotnari, Dealu Mari, Murfatlar, Odobeste and Recas, are better known. Dobrogea, the littoral region to the east of Bucharest on the Black Sea, is the warmest of Romania's districts. Murfatlar represents some of the best known and most exported wines of the country. In addition to wine, the seaside resorts draw tourists to this region.

The districts of Muntenia and Oltenia are large producers of Cabernet Sauvignon, Merlot, Chardonnay, Pinot Gris and Aligote. Romania's famous Dealu Mari vineyards produce some of the best native variety, Feteasca Neagra, making a currant-flavored red wine that ages well. A trip to Dealu Mari is slightly more than one hour from Bucharest on a new four-lane motorway, while Murfatlar is a two-hour trip. Both regions receive tours from the capital, but most Romanian wineries do not receive visitors without appointments.

The third and most popular wine district is Moldova. Its Cotnari region produces *Grasa de Cotnari*, a sweet, perfumed wine that is an icon of the Romanian industry. Sadly, the Moldova district is distant from Romania's capital and is not served by a modern motorway. The regional city Iasi is surrounded by ten monasteries, many of which are famous for their wines. The wine region encompasses a mixture of small striving wineries run by newly minted entrepreneurs, five-hundred-year-old wine-making monasteries, and one mega-winery, Cotnari S.A. The European Union has assisted in the modernization of Cotnari

SA and some of the smaller enterprises. It would seem that Iasi should attract more tourism [51], but this ancient capital of Moldova, "Pearl of Romania" and one-time capital of the nation, is fairly isolated from the rest of the country and, except for a biweekly flight from Rome, from most of Europe.

Infrastructure

There is some signage for wineries around Cotnari, Dealu Mari and Murfatlar, but many of the smaller and ecclesiastical wineries have received neither signage nor paved roads from the Romanian government. The route from Iasi to Cotnari lacks a freeway and requires a one-hour drive. The potential and limitations of this region, considered the best for enotourism in Romania, were described in a recent article by the Romanian tourism researcher Mihaela Oprea Ciopi. In a SWOT analysis she writes that "although much improved, the infrastructure is not reflected in European standards" [52].

Two Romanian wine industry scholars have suggested that Transylvania has the most potential for wine tourism in Romania because of "neatness of architecture" and "pleasant countryside" [53]. Transylvania, at this time is also kept remote by a poor and lengthy road system. There are numerous hotels and spas in all three of the major regions, Dealu Mari, Murfatlar and Cotnari but few of them are associated with wineries.

Language and Education

Romania concentrates on secondary languages both in school and at home. About 30% of Romanians claim to watch English-language television much of the time [54]. It is estimated that more than five million Romanians are fluent in English. Furthermore, two university programs train future skilled labor for wine sales and marketing. The potential for developing wine-tourism programs at the high school level is great.

Attitude

A small survey found that wine researchers and winery personnel consider Dealu Mari to be the only region that conducts wine tourism effectively at the time of this writing. Three-fourths of those researchers surveyed and interviewed by the author listed infrastructure as the greatest obstacle to wine tourism in Romania. Road quality was listed as the greatest hindrance, while cooperation among stakeholders and poor marketing were second and third. Possibly indicative of residual Communist-era thinking, several of the interviewees thought that the government should initiate improvements while only one person believed that change demanded more expenditures by the wineries themselves.

The social anthropologist Monica Heintz has commented on the complexity of Romanian attitudes toward work and toward working together for a common goal [55]. A history of several generations growing up under socialism where the prevalent attitude was to distrust the government or to game the government, has created a "social and moral crisis" resulting from "the unsettledness of the present" as Romania

attempts to change to ideals of capitalism. If this is true, the wine tourism may be delayed until a new generation takes the helm of the nation [56].

6.3. Serbia

History and Government Influence

Serbia has begun to reestablish itself on the world's wine map after two decades of unstable national existence. Wine has been produced in the area since the beginning of the Roman Empire and probably through the Slav/Serbian invasions in the sixth century. The early Serbian Nemanjić dynasty (1166–1371) encouraged viticulture in the region [57], and winemaking continued erratically through the Hapsburg/Ottoman rule until the late 19th century, when both sides of the Sava and Danube Rivers were united into a single state. As a major part of the Socialist Federal Republic of Yugoslavia (SFRY) in the 20th century, Serbia (along with its SFRY neighbors) became one of the world's top 10 wine producers by volume. However, the Serbian wine produced during President Tito's rule was intended to economically slake the thirst of its neighbors and the USSR. Serbia's wine production diminished rapidly with Russia's attempt to lower alcoholism in the 1980s, and the subsequent Balkan war of the 1990s left much of its vineyard land devastated. Presently, Serbia exports about 5% of its wine. Recent revitalization of the industry and encouragement from the Serbian government have resulted in numerous new quality-oriented small producers [58]. Meanwhile, the old Communist-era industrial wine plants search for buyers and solutions.

Wine Regions and Geographic Influence

Serbia's northern border region is geographically part of the larger Pannonian Plain, which makes up most of Hungary to the north. Through that plain flows the Danube River which, intersecting with the Morava River, has left its mark of Sandy Loess to brown steppe soils throughout the northern half of Serbia.

Serbia delineates eight active winemaking regions, which are fairly well dispersed throughout the country. Three of these lie within two hours' drive of Belgrade and therefore can be considered particularly good candidates for wine tourism. Of these three, Bannat, along the eastern border with Romania, and Srem, along the Danube south of the University town of Novi Sad, have the greatest potential. On the northern border with Hungary is the Subotica-Horgoš area which has the active Palić Wine Route with six or more wineries open to the public by prior arrangement. While this region lies on the main route from Budapest to Belgrade, the condition of the highway presents an obstacle to tourism. The drive presently requires more than two hours from the capital.

The Bannat region lies on the side of the Vršac Mountains. The mega-wine factory Versacki Vinograde dominates the region and owns over 1,200 of the region's 2,000 hectares. Its Tito-era winery is one of the largest in the world, six stories high and for obvious reasons built in the shape of a

"Y." The entire facility was recently sold by the Serbian government, which was eager to sell. The property is valued at more than 17 million Euros, but the only bid was 5 million Euros from a Chinese Consortium [59]. Versacki dominated the wine business for more than one-half century, and only recently have small wineries started to appear in Vršac and the neighboring town of Gudurica. The elegant Hapsburg-era architecture in town, along with regional 13th century monasteries and three- and four-star hotels contribute to a possible weekend wine tourism stop.

The town of Sremski Karlovci is the center of the Srem wine region. It lies between the Fruška Gora mountain and the Danube. It is more advanced than the other wine regions in development of wine tourism. It is set to open its first "in-the-vineyard" winery, a rarity in Serbia. Most wineries throughout the Balkans are not estate wineries, surrounded by their produce, but locate themselves in the town. The town winery and tasting room is a model similar to that of Burgundy, France, but the wineries of the western United States discovered late in the 20th century that estate wineries appeal to tourists as more romantic [60]. This region, with more than 20 wineries open, appeared to the author to be more receptive to non-appointment tourist visitors than other Serbian wine regions.

Serbia lays claim to some interesting native grapes. Smederevka, grown around the town of its name, Smederevo, was mentioned by the Roman Emperor Marcus Aurelius Probus. The native Prokupac and the Vranac (meaning "black stallion") are two notable red grapes. An additional claim to notoriety is that Phylloxera is said to be non-existent in a few Serbian vineyard regions, allowing plants to be grown on their own roots and not grafted. Two-thirds of the wine production is white. Serbian appellations are based on sub-region and grape with no formal system yet adopted. Most wine is produced within individual family compounds; therefore, true acreage and production levels are hard to determine.

Infrastructure

The new National Tourism Organization of Serbia has created an elaborate website that promotes the wine tourism routes [61]. As mentioned above, the lack of modern highways impedes the development of wine tourism at this time. Additional activities such as outdoor sports and architectural tours are also lacking in the wine production regions visited by the author. Fine restaurants exist in all these regions, but a lack of signage in English, or in the Roman alphabet, discourages many international tourists. Through concentrated efforts of a few, the government has positioned signage along some of the wine routes.

Language and Education

While conflicts continue to occur over laws in parts of Serbia requiring Roman/Cyrillic signs for Croatian minorities, the nation is eagerly beginning to implement online English programs in its secondary school systems [62]. English was spoken only by the marketing and sales department at Versacki Vinograde, the largest winery in

Serbia. None of the other Bannat wineries visited by this researcher had bilingual personnel. Only a small number of the wineries in Sremski Karlovci had bilingual tasting room personnel.

Serbia realizes the tourism and wine potential in its higher education system. A Tourism program is given through the Faculty of Economics at the University of Belgrade. A wine tourism specialty course is offered in the Faculty of Geography, Tourism and Hotel Management at the University of Novi Sad. The Wine Tourism Academy of Serbia in Belgrade has begun to offer courses for winery personnel on subjects including wine terminology. The agricultural research station at Novi Sad supports a large “no-spray” vineyard with test crossings of 132 different cultivars. It has been quite successful and is admirable, producing new hybrids like Petra and Panoni, which are being planted by in several marginal regions of Serbia.

Attitude

In interviews, wine industry and wine tourism personnel expressed concern about the attitudes of some new winery owners. “They often don't want to work as a team,” said Milos Kalapis, president of the newly founded Wine Tourism Academy of Serbia [63]. Another interviewee said, “I tell them you cannot do this alone. Individualism is a reaction that many coming from the Communist era have, while others favoring the old way of doing things assume they have a right to lifetime employment.” [64]. The 200-plus employees working at Versacki Vinograde may soon have that last assumption tested when the new owners take control of it.

Regardless of whether the interviewee favored individualism or cooperatives, every one said that the government had failed to provide adequate infrastructure to assist in wine tourism development.

6.4. Croatia

History and Government Influence

Croatia's wine culture dates back to the 5th century BCE, when Greece economically and culturally transformed the region through the Dalmatian Islands. By the beginning of the Common Era, Croatia's proximity to Rome prompted an increase in wine production and exports. Slavic language-speakers entered Croatia during the Middle Ages taking on the wine production. This period may represent the first case of legal standards in Balkan winemaking: a statute for the island of Korčula was imposed in 1214 protecting the region's appellation [65, 66]. As with the rest of the Balkans, Croatia experienced a setback in wine production during several hundred years of Ottoman rule followed by a renaissance of the wine industry during the 1800s under the Hapsburg Empire. The destruction of European vineyards by the *Phylloxera* aphid was late arriving in Croatia but eventually destroyed almost all of the vineyards [67]. Islands can sometimes protect species from pests, so a few pre-*phylloxera* vines still exist today on the islands Korčula

and Susak.

The SFRY communist era resulted in the establishment of several large cooperatives and their production of less-than-stellar wine. In the 1991 war of independence from Yugoslavia, many of Croatia's vineyards and wineries were destroyed. In the aftermath, recovery may improve wine quality because it has demanded new plantings and trellising systems favoring the best sites.

Croatia has a claim to being the origin of one of America's most favored varieties, Zinfandel. (It is also the origin of one of California's favorite mid-20th century vineyardists, Mike Grgich, an advocate of that grape variety.) Plavac Mali, used in many Dalmatian blends, is a scion of the original Zinfandel (Crljenak Kaštelanski), which is aboriginal to Croatia. Both of these varieties are still grown in a many places in Dalmatia. Through 2,500 years, Croatia has been a gathering place for grape varieties that have been carried on trading routes through the larger region. It boasts dozens, if not hundreds, of varieties that are grown only in Croatia, as well as all of the popular Western European varieties. The present-day Croatian government has been instrumental in developing a wine industry and an appellation system for the country.

Wine Regions and Geographic Influence

Croatian wine regions are divided into the coastal (and island) Mediterranean climate and the inland buffered Continental climate. The interior and coastal wine districts are divided into regions which are further divided into smaller *vinogorje*, (literally “wine hills”). Altogether there are more than 300 such regional designations. Istria and the Slavonian regions grow nearly one-half the wines [68]. There, wine tourism has begun to grow, but large producers and wholesalers are more common. The region that has always focused on tourism and whose wines are most regaled by the critics is Dalmatia.

The coast of Croatia is especially promising for wine tourism in that it has a long vacation season coupled with extraordinary natural beauty. Add to this the availability of outdoor sports that include wind surfing, game fishing, kite surfing, water skiing, mountain hiking and boating. No one questions Croatia's position among the top 20 world destinations for tourists [69]. Its proximity to Italy, Austria and Germany has made it a magnet for tourists. In 2011, Croatia eclipsed previous records for both tourist dollars (8 billion) and numbers of visitors (11 million), and it is by far the most visited country in the Balkans [70]. The wine industry has not been blind to this surge and small- to medium- sized wineries have upgraded and hung out signs in most seaside towns.

The Pelješac peninsula and islands of Brač, Hvar, Korčula have especially been sought after for their fine examples of Croatia's indigenous flagship red wines: Plavac Mali, Zinfandel and Babić. Grk, Parč and Pošip are indigenous whites which, while always having been popular amongst Croats, are now winning fans on the international stage.

Korčula is home not just to the floral white wine Pošip, but

also to the large cooperative winery of the same name. PZ Pošip is a symbol of the communist era that has succeeded in the new capitalist economy. With more than 80 vineyard owners, some with only one-half hectare, the cooperative has modernized and become profitable in the 21st century. PZ Pošip will soon have the largest tasting room on the island, receiving tourists without appointments. The other 20- plus wineries on the island have also modernized and are receiving tourists on the same basis.

Infrastructure

Croatia's infrastructure has ascended to the level of most EU nations. Four- and five-star hotels abound in most towns and even villages along the coastal highway. Once the last 100 kilometers of the four-lane toll road is finished, a trip from Zagreb to Dubrovnik should take less than five hours. A very efficient and frequent ferry system takes tourists to Brač, Hvar, Korčula. There are also ferries from most major Croatian cities to several ports in Italy. Signage is above average for the Balkans. The Pelješac peninsula offers a variety of water sports, archaeological sites, and fine restaurants.

Language and Education

According to the European Commission, 49% of all Croatians speak English well enough to have a conversation. There seems to be a pride in multilingualism in that 78% of all Croatians claim to speak a second language [71]. About half of the Croatian wineries visited in this study had personnel who spoke English to the author.

University of Zagreb Faculty of Economics offers numerous programs and classes (conducted in English as well as Croatian) in tourism, although none in wine tourism. Likewise, the university's Faculty of Agriculture offers every level degree in Agriculture with a specialty in viticulture. The University of Split also provides an undergraduate and graduate program in viticulture.

Attitude

Croatia has an abundance of independent, entrepreneurial spirit, which sometimes reportedly leads to difficulties in decision-making. A university researcher confided that "it is sometimes hard to get them to listen to what is good science in winemaking" [72]. One winery owner close to Ston stated, "The problem is that the wineries here all have different desires . . . some to produce a lot of wine--500,000 bottles of cheap wine--to make a lot of money. Others, like us, just want to make good products" [73].

Many Croatian wineries do make excellent products; however, some lack business acumen. The owner of a small winery in Čara said that last year she sold 80% of her wine through the tasting room and 20% to a restaurant. "This year it is the opposite," she said, "and we have none to sell in the tasting room." When asked about the wisdom of not keeping any wine for retail sales and selling everything to restaurants, she answered, "Why not? I sell it all at the same price." [74]. Such a marketing strategy does not encourage wine tourism. But generally, there seems to be a positive attitude in Croatia

toward its tourism as well as its wine industry.

6.5. Montenegro

History and Government Influence

Montenegro's long colorful history is about as rocky as the "black Mountains" that the country is named after. While is not certain whether the early tribes or later hill people living in those mountains drank wine, it is likely that the Illyrian civilization living on the coast and in the valley around Lake Skadar did. Although most Montenegrin families produce wine, or have kin who do, there is little mentioned about wine in this country's history until 1963. That year, Montenegro, as a constituent of SFRY, started a vineyard and orchard around Čemovsko field near what was then Titograd (Podgorica). In the 1970s, with money from the World Bank and U.S. Banks, the 226-hectare vineyard grew to 2,310 hectare with more than 11 million vines. It was an amazing feat. Today, Plantaze is the largest single vineyard in the Balkans, and it represents more than half of the vineyard land in Montenegro. The government owns 51% of the company, which turned a net profit of 3.1 million Euros in 2011. The company employs 662 people [75].

Wine Regions and Geographic Influence

Plantaze is not just the 800 pound gorilla in Montenegro's wine industry; it *is* Montenegro's wine industry. The vineyard, possibly the largest continuous vineyard in Europe, extends from the outskirts of Podgorica to edge of Lake Skadar. The land is flat and mostly homogeneous glacial till, but of very low vigor. The corporation depends on 30 wells for water, replenished by good precipitation in the winter. With more than 290 days of sun, and high heat in the summer, the appellation is ideal for many red wines [76].

Plantaze offers three tasting venues, but all require appointments. The most extravagant is Šipčanik cellar, once a hangar for Marshal Tito's air force. This cave, bored into a mountain, now ages more than two million liters of wine in large oak vats. It, as well as the other two tasting rooms, are venues for large corporate events seating well over two hundred. At present, it appears to have potential for greater use.

While there are about 30 other small wineries in the country, they are all family-sized boutique wineries or wine-taverns. These wineries mostly buy grapes from local growers, which include small vineyards in the hills surrounding Podgorica [77]. The red grape Vranac dominates throughout the region, and makes an exceptionally fine wine. Krstač is the indigenous white grape that the wineries ferment to dryness. An additional 70 varieties are grown including Chardonnay, Cabernet Sauvignon, Sauvignon Blanc and other Central European varieties. Zinfandel and Primativo (clones of the variety *Crljenak Kasteljanski*) are claimed to have originated here.

Infrastructure

Podgorica and Plantaze are a little over an hour's drive from the Montenegrin seaside resort town of Budva. There

are good paved roads throughout the country, although the road from neighboring Croatia is sluggish at best because it is not a "limited access highway." The road through Bosnia Herzegovina to Dubrovnic or Sarajevo offers outstanding vistas but is of poor quality and sometimes closed in the winter. An expressway along the coast would be an excellent investment for tourism.

Several ferries each week make the nine-hour trip between Bar, Montenegro and Bari, Italy. There is also a small auto ferry connecting Kamenari and Lepetani which blessedly saves the tourist an extra two hours' drive around Kotor bay. There are direct flights into Podgorica from Vienna, Rome and Frankfurt. If not traveling by auto, Montenegro, and Podgorica in particular, are very accessible.

The region also has numerous tourist attractions in addition to wine. The Tara river gorge, the second deepest canyon in the world, runs through Durmitor National Park and is a popular white-water rafting site. In addition to the pleasant beaches along Montenegro's coast, the closest tourist destination to Podgorica is the Ostrag monastery, only an hour away. Mountain hiking is another popular outdoor sport for visitors to Montenegro.

Podgorica, Budva, Bar and Kotor Bay offer luxury hotels while the smaller villages offer a variety of dining and lodging possibilities. Although both water and electricity have been problems in many of the resort villages the major complaint about infrastructure given by winery personnel who were surveyed was the lack of expedient roadways. Signage in the capital is poor, even for Plantaže facilities. However, signs for wineries and wine taverns are evident along the highways. The Plantaže website is entertaining and elaborate, possibly a little too much as it requires a good amount of time to search out information.

Language and Education

Although few people in the tourism industry speak English, outside of the coastal resorts, Montenegrin institutions of higher education are building greater English language proficiency. An institute for agriculture also teaches viticulture. Two universities have faculties of tourism and hospitality but, as yet, no courses or programs on wine tourism. However, a course on wine business and culture is taught in the Faculty of Business at Univerzitet "Mediteran," and Montenegro has an active sommelier program.

Attitude

If Plantaže directs wine tourism, it does so in a benevolent and seemingly democratic manner. The corporation is 51% owned by the Montenegrin government, the rest by shareholders, many of whom are also employees. A wine grape growers association with about 100 members was started by Plantaže fifteen years ago. The winery's director of research and development, Dr. Vesna Maras, emphasized that Plantaže not only "promotes wine tourism" for itself, but also promotes it generally, for other wineries. In Podgorica, the researcher observed a wine tourism map published by Plantaže, which did include many surrounding wineries. In encouraging visitors, Plantaže may be leading the way in

tourism. Dr. Maras said that the "private sector is not developed [enough] yet to satisfy the need. Many ... people here do not understand the importance of tourism" [78].

6.6. Macedonia

History and Government Influence

Macedonia's history of winemaking dates back to the Paconia and early Greek invasion of the region by Philip II of Macedon, father of Alexander the Great. Wine has been important to the people living there throughout Byzantine, Bulgarian, Serbian and Ottoman rule. When it was a part of Yugoslavia, Macedonia was said to have been responsible for two-thirds of Yugoslavian wine production [79]. Its output diminished rapidly at the breakup of the republic.

Although not as much affected by the Balkan wars as other nations on the peninsula, Macedonia has had its share of struggle with political and ethnic divisions. An uprising to the west, in Albania after the end of the Kosovo War destabilized Macedonia for a while. Even now, continuing charges of discrimination against Macedonians of Albanian descent play against the country's acceptance into the E.U.

Macedonia also has a unique problem: its name. Its entire southern border, with Greece, was closed as a result of the controversy over Macedonia having the same name as the historic region in Greece. Eventually, "Republic of Macedonia" constitutionally became the nation's name. The country was accepted into the UN under the title "the former Yugoslav Republic of Macedonia." However, even this name is a sticking point. The E.U. awarded to Greece the appellation of Macedonian wine as a protected geographical indication (PGI), and that hinders the marketing of the Republic of Macedonia's wine to Central Europe.

Today Macedonia grows about 60,000 hectares of grapes, 80% of which are intended for wine [80]. The wine industry in Macedonia has recovered along with its economy. Macedonia has a remarkable level of production. It exports almost as much wine per square kilometer of total land as Italy, the world's number one exporter. However, this success is not without some disappointments. At the end of 2011, 22 of the 84 registered wineries of Macedonia had their licenses taken away for failure to pay the vineyards for the grapes they had bought [81].

Wine Regions and Geographic Influence

Macedonia has three wine regions, which divide the country evenly from north to south. The middle region, Povardarie, which follows the Vardar River through the country, accounts for 85% of the country's wine production. Most of the vineyards and wineries of this region are found around the towns of Negotino and Kavadarci, two hours south of Skopje. But vineyards of this region start just 15 kilometers from the capital in the north of the country. The Tikves sub-region, near Kavadarci, in particular seems well suited in terms of climate and soils for grape growing.

There are a healthy number of wineries for a country the size of Macedonia, and their concentration boosts the potential for wine tourism. However, a few large wineries

dominate the industry and landscape. Stobi, Bovin, Skovin, Elenov, Ohrid and Tikves each produce from several hundred thousand to several million liters of wine per year. The largest part of this production is exported in bulk to Germany, Russia and other European wineries. The interest that these mega-wineries have in tourism is secondary to their interest in wholesale bulk and bottle sales.

Still, some wineries, such Tikves Winery in Kavadarci, attempt to bring in tourists. The 35-million-liter winery started in partnership with Metaxa Winery of Greece soon after the Ottomans pulled out of Macedonia in the 19th century. It grew to the enormous size it is today during the Communist years, but its production began to wane in the 1980s. In 2003, a consortium called M6 bought the winery and invested 12 million Euros to modernize the old plant.

Tikves has a large tasting room and restaurant but reservations are required. A worker boasted that the number of visitors had increased from 6,000 six years earlier to 10,000 today. That number still seems low (35 visitors per day) considering the size of the operation. Other large wineries like Ohrid Winery on the eastern border and Eleno Winery near the border of Greece, have similar histories and investors, waiting for the boom in Macedonian wine.

That boom will benefit from a growing focus on quality in both the vineyard and the winery. Currently, most wineries largely depend on what the researcher estimates to be 10,000 small farmers [82]. The inconsistency in quality of the wine grapes that are received from this multitude of producers hampers the production of high-quality wine. The ubiquitous bulk wines have limited the reputation of the Balkan region in the world wine market. Here, Tikves may have a solution: employing modern methods of grape selection, testing and sorting.

Infrastructure

In spite of its abundance, Macedonia, like Serbia, is landlocked and a long drive from Central Europe or the Mediterranean coast. However, various tourist attractions exist around the vineyard regions. Tikves has one of Europe's best ornithological sites, and not far from Kavadarci and Negotino are Macedonia's premiere archaeological ruins. The popular domestic and international resort towns on Lake Ohrid on the border of Albania offer beaches as well as vineyards and wineries.

Macedonia's major toll-expressways run through the middle of the country from the Serbian border to Greece. Neither Greece nor Serbia has met these with the same quality of road. More than a dozen international carriers have flights connecting Alexander the Great Airport to major European destinations. Several large four-star hotels exist in the capital, but none are in the winery/vineyard regions. At least two large tourist agencies within the country conduct winery tours, sometimes combined with visits to archaeological sites and an overnight stay at a winery. A few wineries offer small hotels and restaurants. Some, like Kamnik Winery in Skopje and Popova Kula south of Kavadarci include other attractions, such as hunting or

boating. Only a few more than half of all wineries take in visitors for wine tasting, and almost all of those require prior notification. The minor roads to the wineries are usually paved, but for the most part, signage for these is poor throughout the country and where signs are found, they are predominantly in Cyrillic.

Language and Education

Since 2007 English has been mandatory in the first grade, but throughout Macedonia there is a lack of qualified English teachers. Ironically, the teaching of English, which would be a long-term help in tourism, has suffered because of the great immediate demand, and higher pay, for English speakers in the tourism sector [83]. The new University of Tourism and Management in Skopje may help satisfy the needs of that burgeoning industry.

Attitude

While there is an immense energy in both the wine and tourism industries in Macedonia, wineries have yet to develop consistent ways bring the passing tourist into the winery. They have no formal wine trail organizations like those that have formed in neighboring Serbia yet enough wineries exist to make such an organization an attraction. Some Macedonians blame the government for not being more proactive and spending more on advertising its tourism. However, the situation may be more complex than that. The head of Tikves Winery's tourist relations believed that the government gives back to the winery some money it collects from taxes on the wine to help with tourism. There has been a consistent increase each year in the number of tourists visiting Macedonia, but statistics and observations suggest they are not overcrowding the wineries [84].

6.7. Thrace, Turkey

History and Government Influence

The Thracian plateau includes that portion of Turkey abutting regions in Bulgaria and Greece and considered part of the European continent. It contains mildly a undulating countryside that descends very slowly to the Sea of Marmara in the south. The plateau has been producing grapes and possibly wine for at least six millennia [85]. Winemaking originated at the other end of present-day Turkey, in the Caucasus Mountains bordering Armenia and the Republic of Georgia.

Modern-day Turkey enjoys a love-hate relationship with winegrowing. While the Anatolian Peninsula supports more vineyard land than does the United States, most of it is used for raisins and table grapes. Turkey's production of wine is only beginning to reach a critical mass, but it may yet get recognition from the wine world.

In 1925, Mustafa Kemal Atatürk, the founding father of post-Ottoman Empire Turkey, founded the country's first commercial winery. For many years after the leader's death Turkey's wine production remained stagnant. The past five years have seen the wine industry quadruple, but both Turkey's government and its culture create some obstacles to

success. Bowing to pressures from fundamentalist political factions, Turkey has instituted reforms during the past decade that have suppressed the wine making. In 2003 a 65% tax was imposed on all wine sold in the country (and over 200% on sparkling wine). This has since been retracted for domestic wines, but newer legislation limits sales in other ways. In May, 2013, under prime minister Tayyip Erdoğan, Turkey passed a law prohibiting the sale of alcohol after 10 p.m. and prohibiting the advertising of wine and beer anywhere in the country [86].

Such restrictions work against wine tourism; however, as one winery owner put it, “the government will change... have to change again, sometime” [87].

Wine Regions and Geographic Influence

There are 26 wineries in Thrace presently and in spite of the new legislation, the number is likely to increase. The sub-peninsula has a perfect Mediterranean climate for grape growing. In addition, one of the world’s major capitals is less than two hours away. Doluka, a giant wine corporation with capacity of 14 million liters is located within an hour of Istanbul at Cerkezkooy. Doluka’s beginnings, like those of Kavaklıdere winery outside of Ankara, date back to the era of Atatürk in the 1920s when there was a great demand throughout the region for cheap wine. Several other large Turkish producers include Kayra, Pamukkale and LA on the Anatolian peninsula. But the smaller wineries both around Izmir and in Thrace are the ones that are likely to hold the promise for growth in wine tourism. They have already begun to market themselves internationally as receptive to tourist.

Turkey’s viticulture is divided into seven general areas, but this survey is concerned only with the Thracian region. Many people in the Thracian wine industry agree that Izmir is the competition to beat in enotourism. “They were born into tourism,” one vineyard owner commented [88]. The Izmir region has integrated hot springs, hot-air balloon rides and archaeological sites into its wine trails.

This does not mean that the 26 wineries on the Thracian arm of Turkey don’t have attractions worth visiting. The wine region is on the expressway from Central Europe to Istanbul and has sites such as the historic Sula Bay to visit. The wineries have just not coordinated and organized quite yet to the degree that the wineries in Izmir have.

Thracian wineries may seem too far apart to create a cohesive wine trail. Yet this is what Mustafa Chamlija, a one-time vice-president for Arthur Anderson accounting firm and now vineyard and winery owner, wants to do. “Connect the 26 dots,” [89] he said, and then “the wine trail connects to wine trails in Bulgaria and Greece.” One winery, Arcadia Vineyards, has moved ahead with enotourism, creating a small hotel among the vines. Others seem to have similar plans. Necdet Uzan of Chateau Nuzan, a small winery just forty minutes from Istanbul said that “wine tourism will eventually happen here” [90]. But for now, it is easier for the urbanites to make day visits to the winery or for

Uzan to take his wine to the city.

Infrastructure

Chamlija Winery owner Mustafa Chamlija said “we have good roads, but they are all for business, not for tourists.” With the new legislation limiting advertising in place, it is too late to place signs along the highways advertising wineries or giving directions. There is also a lack of good hotels throughout this predominantly farming region. Most international tourists stay in Istanbul. What hotels and spas there are on the coast are not up to EU standards and are mostly rented by working class Turks, whose interest in wine, even if they are not very religious, is cursory. One wine blogger commented that the government has, in the past, given money to help develop wine trails, but that there will have to be a major political change before that will happen again.

Language and Education

Some English is spoken throughout much of Thrace. It is required in schools and 13% of Turkey’s population claim it as a second language [91]. English proficiency is said to be a factor in determining social class in Turkey. Faculties of tourism are found in many Universities in Turkey, some with programs specializing in food and beverage management. The Kayra Wine Center in Istanbul, associated with the large winery of the same name, teaches wine and sommelier courses.

Attitude

Agronomically, what is obvious about Thrace is that the region grows far more sunflowers than grapes. Over 300,000 hectares (25% of the farmland) are dedicated to the picturesque crop [92]. The cost efficiency of sunflowers is not close to that of wine grapes, but grapes are a risky crop in Turkey today. Because of the recent turn toward religious fundamentalism in the rural population, no grower wants to be seen selling grapes to a winery, so all negotiation must be done through a middle man, who pledges (falsely) not to make alcohol. All this makes it hard for wineries to influence vineyard management. It is difficult for wineries to obtain good fruit unless they grow it themselves [93].

First-hand accounts suggest that there is a great difference between the large wineries in Turkey, which so far have been benevolently ignored by the government, and the small striving wineries which receive some resistance in their attempts to set up shop. Overall, however, the amount of optimism among the Thracian wineries is surprising considering the conservative retrenchment of the government. In 2008 two agricultural economists interviewed 42 winery owners throughout the country and found that 43% were positive about the future while the rest rated it as pessimistic or bleak [94]. The wineries in Thrace appear to be optimistic and have a European orientation for business. They also have the support of wineries across the borders in Bulgaria and in Greece.

7. Limitations, Conclusions and Recommendations

Limitations, Obstacles and Complaints

This survey offers an initial look at the potential for wine tourism on the Balkan Peninsula. It is neither comprehensive nor is it a random sample of opinion. But, it highlights some obstacles to wine tourism and it hopes to stimulate thought and action toward solutions. Some obstacles have yet to appear at this phase of wine tourism—traffic jams along tourist routes that occur in major wine regions like Napa Valley and the North Fork of Long Island—but some have been well delineated by the people interviewed in this study.

Infrastructure: More than half of the interviewees complained about the lack of infrastructure, be it well paved and plowed roadways in Bulgaria, Romania or Serbia; signage and directions to wine regions in Bulgaria, Romania, or Turkey; or first class hotels and other tourist facilities in the wine regions of Macedonia and in Turkey's Tracian Plateau. Infrastructure, in the form of bed-and-breakfast lodging as well as tourist activities, was also the greatest concern for winery owners that Jurinčič and Bojnec surveyed in Goriška Brda Slovenia [95].

Language and Education: This was only a concern of wine professionals in Serbia, but a lack of English speakers in the tourism industry was also definitely noticed by the author in Macedonia and Montenegro. It is assumed that this problem is already being addressed and that English as a commerce language is becoming more common in all the Balkan nations. In addition, a desire for clerical specialties in wine at the secondary and college level was also suggested by some of the interviewees.

Government support of wine and tourism industries: While almost all regional interviews contained complaints about a lack of government involvement in wine tourism development, in some cases, as in Turkey, the concern was about too much government. Little can be done by Turkey's wine industry alone to change this, but these complaints are often symptomatic of the larger problem that follows: attitude.

Attitude: An invisible obstacle to wine tourism development is in the attitudes and expectations of winery entrepreneurs and workers. A number of academics and those who study the wine and tourism industries, as well as winery owners, expressed concern about a resistance to cooperativeness; a reluctance by winery owners and workers to unify their energies into marketing groups or wine trails. Other interviewees were more irritated by the tendency toward passivity, a willingness to wait for the government to act instead of combining their monies and labor to invest in the future. Some saw a lack of receptivity to new ideas and new ways of operating, such as direct sales. All of these behaviors may be syndromes of the post-Communist era. This is the area where history seems to have had the greatest effect on wine tourism in the Balkans.

Models

Nations and industries often look for models to follow when they are reinventing themselves. Most of the Balkan nations in this survey seem to have chosen the New World as a model for the new, leading wine nations they wish to become. Many of the winery and tourism personnel interviewed spoke of marketing concepts from the United States and technology from Australia and New Zealand. Analysis of the material here suggests that they would do well to also look closer to home, in particular to Central Europe, for the strategies that will lead them to success.

The Balkan wine industry, and maybe the tourist industries as well, have historic, geologic, and demographic similarities to those industries in France, Italy and Germany. Like Central Europe, the Balkan's new nations are built on the ashes of dreadful wars. On the other hand, America's wine industry was predicated on the conquest of lands owned by Mexicans and Native Peoples. Large parcels were bought or stolen. Most vineyard land in Central Europe is in small parcels, and has long been owned by tens of thousands of families. This is similar to land tenure in many Balkan states. In contrast, most of America's vineyard land--the total which is greater in size than the sum of vineyards in Bulgaria, Serbia, Croatia, Macedonia and Montenegro--is owned by corporations. Fewer than 1,500 family farms are growing wine grapes in the United States [96].

The development of the industry in Europe is different from that the United States as well. Most of Europe's permanent winery success stories are built on slow but continuous growth and the development of local markets, the originators of "locavore" and "locapour." This is unlike the American wine industry, which over the last two decades has morphed into a war of acquisitions and take-overs that have led to megacorporations such as Constellation Brands and E.J. Gallo. It is not that France and Italy haven't spawned such large wine groups, but in the United States the small family vineyard is the exception. Some in the United States are learning from Europe the importance of staying small and buying and selling local. In the wine business, this has resulted in learning to sell direct to the wine tourist who is often a returning customer.

The Promise of Balkan Wine Tourism

A final suggestion made by more than one interviewee was that it would cost the Balkan nations very little to form alliances that could enhance and promote contiguous border regions. Such cross-boundary regions would include (but not be limited to) the following:

- the wine regions along the border of Northern Romania and Moldova,
- the Sadova Coravia region of Romania with the Danube region of Croatia
- the Banat regions of Serbia and Romania,
- the Srem and Timok regions of Serbia with the Danube region of Croatia,
- the Subotica-Horgoš region of Serbia with the Pannonian vineyards of Hungary,
- The Lake Ohrid Regions of Macedonia and Albania.

the Povardarie region of Macedonia with the Macedonian region of Greece.

The possibilities are many and the synergies are great; as one wine tourism specialist put it, "It would be vineyards without borders" [97].

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