



2017 KIEP Visiting Fellowship Program



The Tourism Industry in Arab Spring: Effects and Perspectives

Chokri MAKHLOUF



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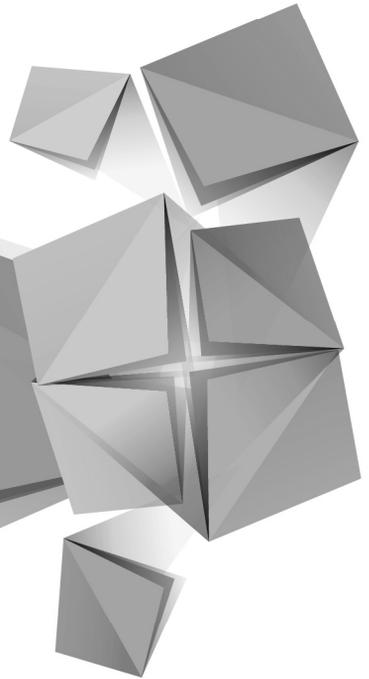
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The Tourism Industry in Arab Spring: Effects and Perspectives

*Chokri MAKHLOUF**

Abstract

The disturbance of Arabic countries especially in the MENA region called the “Arab Spring” has had a direct impact on the tourism industry of the Arab region. Volatile events, instabilities, political turmoil and extremism present the tourism industry with significant challenges. But in any event, future developments will depend in any case on the security situation in the country, as tourism is certainly a sector with many advantages in terms of foreign investment and foreign exchange. At the same time, it is a very sensitive sector. The slightest social upheaval, the smallest popular movement, these all have incalculable effects on the sector.

Tunisia is an excellent example of what can happen to the tourism industry in such cases. This paper explores first the effects that the Arab Spring has had on tourism industry performance. We aim to identify the influence that events of the Arab Spring had on tourism in Middle Eastern and North African States, namely by examining the cases of other countries such as Egypt and Tunisia in comparison

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with Morocco and the United Arab Emirates.

Finally, the study examines the policies and strategies adopted by Tunisian governments in order to mitigate the crisis in the evolving tourism sector, and to develop recommendations on how the tourism industry can recover from the Jasmine Revolution.

Keywords: Arab Spring; Jasmine revolution; tourism crises. Terrorism, fear, impacts, travel, tourism, effects

I. Introduction

The tourism industry is one of the most important industries in the world since it employs more than 250 million people worldwide. The number of international tourist arrivals (overnight visitors) in 2015 increased by 4.6% to reach a total of 1.186 billion worldwide, an increase of 52 million over the previous year. It was the sixth consecutive year of above-average growth in international tourism following the 2009 global economic crisis. Tourism flows were influenced by three major factors in 2015: the unusually strong exchange rate fluctuations, the decline in the price of oil and other commodities, and increased global concern about safety and security. This industry, which includes transport, lodging, and catering, was expected to generate \$12,119 billion of revenues and 279,346,000 jobs in 2016 (Asia-Pacific Economic Cooperation 2006).

Arrivals in the Middle East increased by 2%, while in Africa they declined by 3%, mostly due to weak results in North Africa. International tourism receipts grew by 4.4% in real terms (taking into account exchange rate fluctuations and inflation) with total earnings in the destinations estimated at US\$ 1,260 billion worldwide in 2015 (euro 1,136 billion). Worldwide, the tourism industry is also expected to indirectly

and directly contribute 10.9% to gross domestic product (Asia-Pacific Economic Cooperation 2006). However, the tourism industry is an extremely sensitive and vulnerable sector which can be impacted significantly by important events such as terrorism, political insecurity, and natural disasters (Coshall 2003). This is exactly what happened to Tunisia. Tourism in Tunisia is one of the important sectors of Tunisia's economy and a source of foreign exchange for the country. Tourism also has a ripple effect on other economic sectors, such as transport, communications, crafts, commerce and construction.

The geographical location of Tunisia, south of the Mediterranean basin, with 1,200 kilometers of mainly sandy coasts, a warm Mediterranean climate in summer and mild winter, a rich civilizational heritage (eight sites inscribed on the Unesco World Heritage List) and above all a low cost of tourism, make this country one of the main destinations of European tourists in Africa and the Arab world (the fourth most visited country after Egypt, South Africa and Morocco): Tunisia welcomed 7,048,999 visitors in 2008 and has set itself the goal of getting closer to ten million tourists by 2014.

However, the impact of many events, such as the 2011 revolution, the Bardo Museum attack, the Sousse bombing and the Tunis bombing, has led to a significant slowdown in activity.

In this context, and given the importance of the tourism sector for Tunisia as a major asset for its economy, a strategy must be implemented by the Tunisian state to formulate the appropriate plans and actions, on one hand to examine the impact the revolution will have on the tourism industry, and on the other hand to determine the solutions that Tunisia must follow to normalize operations in the sector.

The Tunisian economy has experienced a remarkable fall since the Jasmine Revolution. A decrease of 40% in the number of visitors was recorded in the tourism sector compared with previous years. However, businessmen and investors are worried about the situation in the country, in addition to the continuous strikes in numerous sectors that have been triggered since January 14, 2011. Growth rates rose to nearly 5% last year, in comparison to 1% in 2011. Government authorities must take appropriate

policy measures for the recovery of the Tunisian economy, which heavily depends on managing the tourism crisis.

Political, economic and social stability is very important for the tourism sector, which is a very sensitive sector. Therefore, the Tunisian tourist authorities must adopt an effective plan to upgrade the security of the country. Since the economy of Tunisia depends mainly on tourism, what is the impact of the Jasmine Revolution on the country? What is the impact of the revolution on the tourism sector in other countries? Finally, what strategy should the tourism authorities and the Tunisian governments do to remedy the effects of the revolution?

Better decisions must be made to attract tourists again. To ensure the success of the tourism sector in Tunisia, recommendations must be offered to Tunisian tourism officials. A study would be necessary to bring tourists back after a revolution that disrupted the political situation of the country. Finally, the example of other countries in the same situation as Tunisia, and also countries that have not experienced the revolution, will be cases to analyze in this paper.

1.1 Social and Political Situation

Tunisia was ruled by President Habib Bourguiba after gaining independence in 1956. For 30 years, the country improved women's rights and ratified a personal status code. Tunisia was one of the most advanced and modern countries in the Arab world.

Tunisia is one of the oldest political entities of the Maghreb. Open to the Mediterranean world, the country has welcomed on its soil many civilizations: Phoenician, Roman and Arab-Muslim. The first country in the Maghreb to have been Arabized, Tunisia became independent in 1956 after 73 years of French protectorate ("Islamists set sights in Tunisia" 2011).

It appears to be a pole of stability in the region and enjoys a special position within the Arab-Muslim area because of its cultural and economic specificities. Thus,

its population is characterized by a great religious and linguistic homogeneity. In the field of education, Tunisia has also recorded notable improvements in recent years and is a good student of the Maghreb. Its educational system nevertheless faces many challenges. Upon independence, Habib Bourguiba, the first president of the Tunisian Republic, embarked on a new era in education. Relying on the structures set up under the protectorate, it has a policy of mass schooling by making schooling compulsory.

In 1987, President Bourguiba was dismissed by a coup and replaced by General Ben Ali. The advent of this second Tunisian republic opened a phase of economic growth which began with structural adjustment plan applied in the same year. At the beginning, the Ben Ali years seemed to be under the best auspices, with “openness” as a political agenda. Previously, the country had already experienced phases of decompression, when viewed with hindsight. But the temptation was great to consider that this time the opening would be of a completely different scope (“Tunisia’s Jasmine Revolution” 2011, p. 18676).

President Zine El Abidine Ben Ali had to reassure his population, particularly women, who were alarmed by rumors that there was the possibility that the status of women would be questioned. He then executed a “backward step, because there can be no development if half of society, women, are excluded.”

The Jasmine Revolution brought to power a generation of opponents who, during the dark hours of the Ben Ali regime, never thought of uniting and were at risk of tearing the nation apart. The Islamists are waiting in ambush for the failure of the new leaders to gather power and impose their anachronistic laws. Their propaganda is already trying to make the liberation of women a legacy of the dictatorship of Ben Ali.

1.2 The Economic Situation

The first period of Ben Ali was characterized by economic reforms, a good recovery of the Tunisian economy, “as if a Tunisian Big Bang had occurred in November 1987.” Tunisia recorded a peak in its GDRP growth rate in 1987, reaching 6.7% according to the World Bank (“Ali Baba gone, but what about the 40 thieves?” 2011). Almost all the reports that have been made on Ben Ali's first period show that Ben Ali succeeded in leading the country out of the economic crisis.

The second period of the Ben Ali administration has carried out reforms in the economy and led an upgrading of the Tunisian economy during the first decade of its mandate, while the second suffers from a deterioration in the economy and a discharge of the unemployment rate with a blocking of investment. During these two major periods in Tunisia's history, attention has been focused on the social or the economic and neglecting the other. There has often been an imbalance between these two axes which leads the country to a crisis situation.

Tunisian tourism, the second largest source of foreign exchange after oil, is a major part of the economy of the country, drawing its strength from the opportunities offered by a sunny coastline bordered by sandy beaches, and a blue azure. What is more, Tunisia is known for the richness of its archaeological sites located in picturesque towns that all benefit from excellent hotel infrastructures. These are aimed at a European clientele, mainly French, German and Scandinavian.

In Tunisia, tourism is divided into five main zones: the northwest coast, the coast of Carthage and Sidi-Bou-Saïd, a few kilometers from Tunis; the Gulf of Hammamet, which includes Nabeul; the Sahel stations, which include Sousse and Monastir; the south, with Djerba la douce (also nicknamed the island of the Lotophages according to legend) and the Saharan escapes of Matmata, Tozeur, Nefta, Kébili and Douz. The policy of encouraging Tunisian (especially seaside) tourism was initiated at the beginning of the 1960s. Since then, the number of visitors has increased from 105,000 in 1963 to 2.1 million in 1981, then to 3.5 million in 1992. Finally, it was 7 million in 2008. The annual receipt for this sector constitutes 9% of the gross national product

(Tunisian National Office of Tourism).

The industry is estimated to support 510,000 jobs by 2021, which is 13.1% of the total jobs in Tunisia (World Travel & Tourism Council [WTTC] 2011). The tourism industry has occupied the first position for the export of services and products. In addition, the foreign receipts generated by tourism also amounted to 44% of the trade deficit (Poirier & Wright 1993). The contribution of travel and tourism to total GDP was almost 9% in 2009 and is expected to be 14% in 2021. The destination is also expected to welcome 9,700,000 international tourists in 2021. The tourism industry contributes indirectly to the gross domestic product of the country since it provides a great deal of employment for the construction of hotels, tourism marketing, aviation, sanitation services, fuels, purchases of food, and cleaning products (WTTC 2011).

The tourism industry in Tunisia has been historically dominated by European tour operators (“Travel and Tourism in Tunisia” 2009). Considered as a mass sector, tourism in Tunisia has been marketed as an all-inclusive package including airfare and hotel. In the 1990s, 80% of the tourists came via a tour operator (Poirier & Wright 1993). The dominant tour operators have been Tui, Thomson, and Nekerman. All of these key players have their own subsidiaries in the major European countries. The consolidation between wholesalers made them increasingly dominant as hotels in Tunisia were not able to coordinate their prices to gain influence (“Travel and Tourism in Tunisia” 2009). Consequently, an unbalanced relationship has been established between tour operators and hoteliers. This has forced hoteliers to sell their properties at a low rate. In an effort to boost the tourism industry, Tunisia has started to negotiate with some European countries an opening sky agreement between both of them (“Tunisia: Open Sky agreement by 2010” 2009).

1.3 Historical Background of “The Jasmine Revolution”

Starting from November 7, 1987 and up to January 14, 2011, Ben-Ali was the

President of Tunisia. According to the constitution, Tunisia was a free republic but in truth it was an authoritarian regime. Human rights were not respected, so there was neither freedom of opinion nor freedom of the press; justice was often instrumentalized on the part of Ben Ali; the opposition was not respected; there were political prisoners, etc., making it feasible to talk of a dictatorship. Ben-Ali censored the press, blocking reporters from expressing their opinions freely. He manipulated election results and announced false unemployment rates. He spoke of about 14% of the people being unemployed, but European observers found that 25% of the population (up to even 50% in some regions) is unemployed. Since independence from Tunisia, agriculture has ensured food security and 12.3% of Tunisian GDP. About 16.3% of the labor force was employed in the agricultural sector in 2006.

Tourism and textile production are alongside agriculture the two most important sectors for Tunisia. But for young Tunisians there is no great prospect in these areas. School education is of high quality in Tunisia and so there are many young graduates who cannot find work. The current generation of Tunisia is more developed than the previous generation. They know how to use the internet and other types of media and want to be a part of the European society, which is much more modern than Tunisia. “Living and letting live” is a revolutionary idea, which has not yet completely arrived in the old and historical government of Tunisia. After December 17, 2010, protests against unemployment, nepotism and administrative power turned into political protests against the Ben Ali regime. The regime tried to stifle these revolts by tapping the phones, reading Protestant blogs on the internet and trying to block internet sites. But these attempts did not succeed. Facebook was the Protestants' favorite medium of communication, which they used to code their messages, share videos and exchange information about the protests. So the revolution in Tunisia was a revolution of Tunisian youth.

Mohamed Bouazizi, who was born on March 29, 1984 in Sidi Bouzid, died on January 4, 2011 in Ben Arous. The young Tunisian came from a poor family whose father, an agricultural worker, died very early. There were seven children and this great family suffered a setback after the loss of land. This is why the young Bouazizi

had to work very early in the fields and then later on occasionally as a mason. He left high school to finish and work to support his family. At the age of 19, he became a salesman of fruit and vegetables, constituting the only income of the family. But the police confiscated his goods, his scales, and fined him without authorization. This made his dream of buying a pickup truck for sale less and less feasible. On December 17, 2011, his work equipment was again confiscated from him, leading him to complain to the governorate, where he was insulted and hounded. Bouazizi, in despair, humiliated himself before the governorate by immolating himself. He was transported to the hospital of Sfax, the maritime city, then to the hospital of Ben Arous, near Tunis, where he finally died on January 4, 2011. This gesture from a simple slap was the beginning of a revolution in Tunisia and became the origin of a butterfly effect that impacted the Arab world (Abouzeid 2011, January 21).

The trigger for social disputes was the exorbitantly high food prices, high unemployment rates, lack of investment and poor prospects for youth in the region. The younger generation is relatively well developed, yet the chances of obtaining suitable employment are low. The regime itself, which controlled the media with a complete system of censorship, presented its way of governing the country as a great economic success. Growth in the economy was 3.1% in 2010, according to official figures. The International Monetary Fund praised the government during the financial crisis in 2007. While the north of the country, including the capital city of Tunis, regularly received large-scale infrastructure assistance, other areas were not as well served. The country was relatively calm in the north and the tourist areas. Tourism is one of the main branches of the economy. 13.9% of the power of the country's economy depends on it. The government was considered corrupt ("Tunisia's Jasmine Revolution" 2011).

II. Tunisia and the Impact of the Jasmine Revolution

Up to now, only the UN had released a human casualty assessment for the Tunisian revolution: 300 dead and 700 wounded. Tunisia now has more precise figures. According to the report published by the national commission to investigate abuses committed since December 17, 2011, 338 people lost their lives and more than 2,174 were injured. But this balance is not yet final.

This is Tunisia's first official report on the victims of the revolution. After more than a year of investigation between hospitals, families and the administration, the commission released a casualty count of 338 dead and 2,174 injured.

Tourism in Tunisia experienced the worst decline after the revolution, according to tourism indicators, falling dramatically by two million tourists and 3,000 jobs lost, with a 33% drop in revenue in 2011. Thomas Cook canceled all flights from the United Kingdom to Tunisia until the end of October 2016. While service to Tunisia was resumed from April, operators had to comply with the instructions of the British Foreign Office which "always discourages any trip to Tunisia except for imperative reasons."

The tour operator Thomas Cook also withdrew this destination from its offer until the end of August. Belgian Foreign Affairs advises against going to Tunisia since the killing that killed 38 people in a hotel by the sea (Becheur 2011). But as the cancellation of reservations concerns customers from the UK alone, the British tour operator always offers flights and stays in Tunisia from Germany, Austria and France, countries that do not advise countries of the Maghreb.

The tour operators Jetair, Sunjets VIP Selection cancelled all departures to Tunisia until the end of August 2015, announced TUI Belgium, which brings together the three brands. "Affected travelers may change their vacation without charge to another travel destination, or cancel them with refund of the amount paid." (Travel Weekly 2011).

Nevertheless, this decline has resulted in the need for a Tunisian tourism revolution

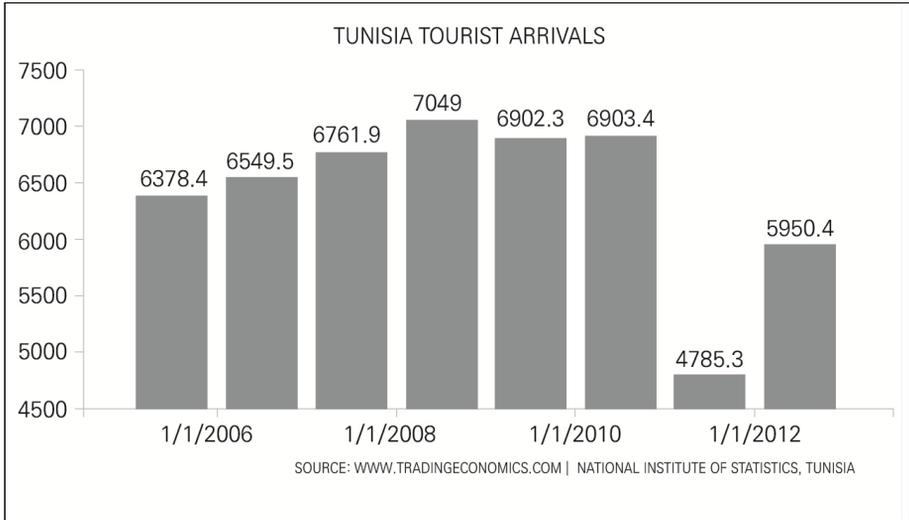
to achieve a goal consistent with the nation's expectations. Observers have criticized the leaders for their lack of innovation and promotion of tourism products in Tunisia. Despite the diversification of tourism products stemming from its rich cultural heritage, ecological tourism and responsible tourism, tourism Saharan tourism, medical tourism and thermal tourism in Tunisia has remained enclosed in seaside tourism (Sun, Sea, Sand) due to lack of promoting and development of different types of tourism.

The hotel sector, already in crisis and heavily indebted, nevertheless seems to cut corners on services to find its account ("Tunisia's Jasmine Revolution" 2011).

Algerian tourism in Tunisia is constantly on the rise and the market has increased the most in recent years (+ 35% between 2013 and 2014). In 2014, Tunisia welcomed 1.3 million Algerian tourists according to the national tourist office and all the indicators suggest that it will manage to stay on course this year. In a gloomy context, where from January to June 2015 tourism receipts had already declined by 12.2%, Tunisians can count on their neighbors to fill – at least in part – the shortfall generated by the absence of Europeans.

The tourism sector situation has created a need for development and enhancement of the various tourist offerings, to improve the infrastructure and to transfer quantity tourism to quality tourism.

Tunisian tourism needs renewal to rise among the flagship destinations through investment and efforts in marketing and promotions.

Figure 1. Tourist Arrivals in Tunisia, 2006-2012

Source: National Institute of Statistics, Tunisia (2017a).

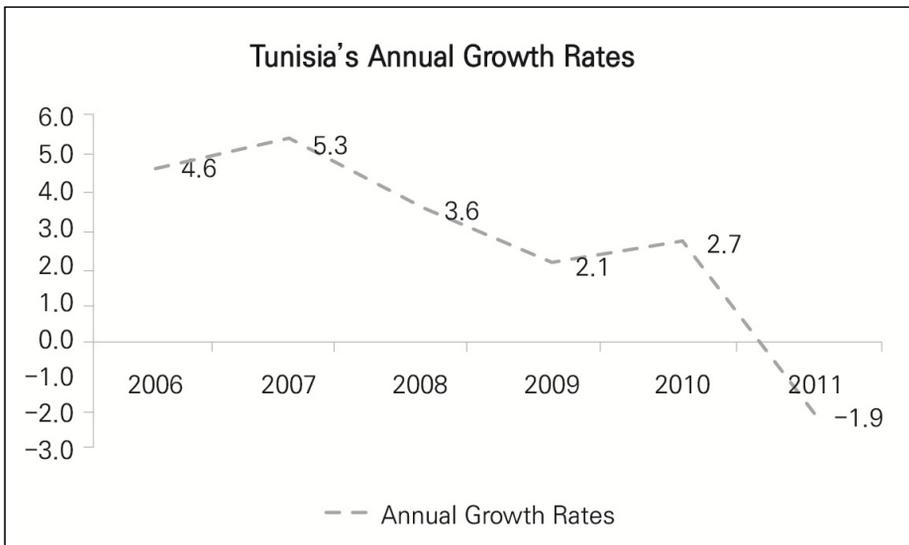
Figure 1 above shows how the tourism arrival to Tunisia was affected after 2010 due to the economic crisis, following a strong increase from 2006 to 2008. After an increase from 2009 to 2010, a sharp decline in tourism arrival numbers is visible for 2011, recovering only slowly in 2012.

2.1 Socio-Economic Effect of Terrorism Attack

The terrorist attack on the Bardo museum in Tunis severely damaged Tunisia's tourism sector, which accounts for more than 7% of the country's GDP. More than 480,000 jobs depend directly or indirectly on this sector, or about 12% of the working population (3.79 million people in 2014, according to the World Bank). The attack thus destabilized the entire Tunisian economy. "Experience shows that the tourism industry is very resilient and that destinations such as Tunis are recovering quickly

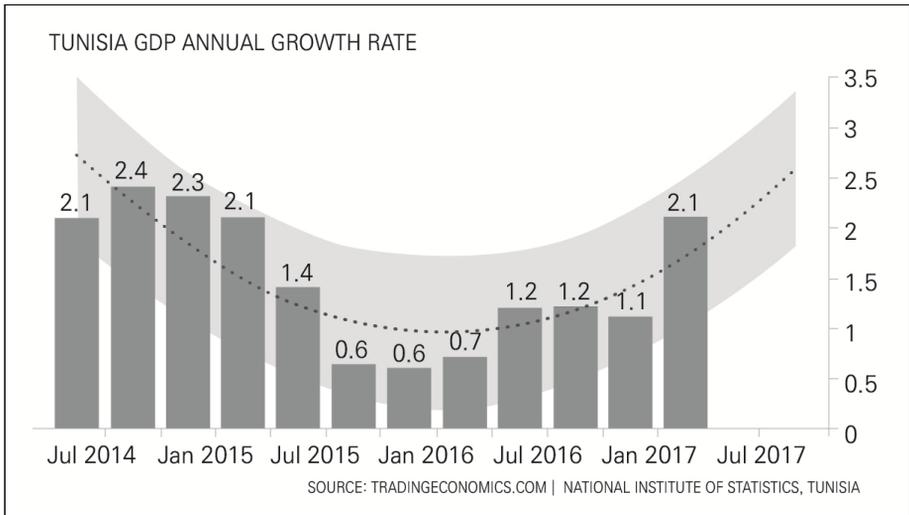
in a few months,” said David Scowsill, CEO of the World Travel and Tourism Council (WTTC). However, the consequences of multiple events such as the Sousse bombing and the Tunis bombing have led to a significant slowdown in activity. (Oxford Business Group 2010).

Figure 2. How annual growth rates were affected after 2010



Source: ERS International Macroeconomic Data Set.

Figure 3. How the annual growth rate was affected from 2014 to 2017



Source: National Institute of Statistics, Tunisia (2017b).

Since the Jasmine Revolution, the whole industry has lost more than 19,000 jobs.

2.2 The Impact of Tourism Arabic Spring on Other Countries

We will first of all observe the impact of this revolution on the different markets issuing tourists. Differences in foreign policies between different Arab countries can be perceived. This will help us to make recommendations for the destination in the second chapter. Next, we will discuss the developments that this country should consider, its recovery policy and the stabilization of the tourism industry. We will discuss diversification, partnership and networking between the public and private sectors.

The Case of Egypt

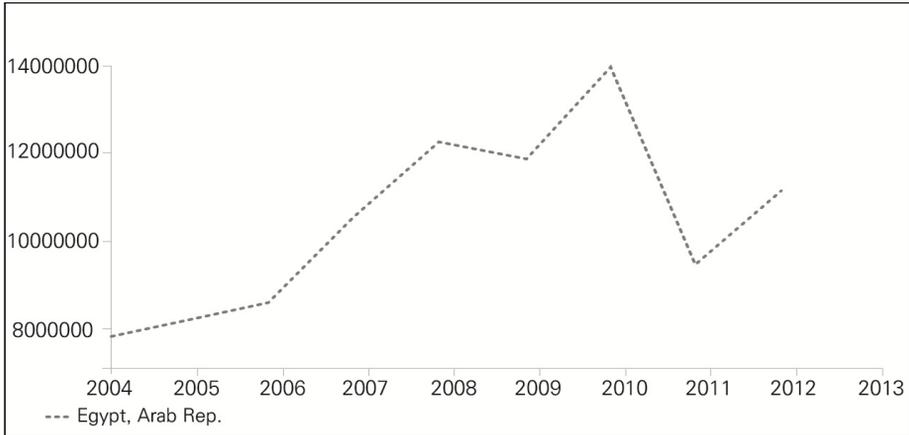
Following the Egyptian revolutions of 2011, tourism activity dropped by around 70% in the main tourist sites, resulting in a loss of around 7.5 billion euros this year due to cancellation of stays to this destination. In 2012 and 2013, tourists returned to Egypt, including the Russian, German and British clientele, while the French continued to leave this destination. Two explanations can be found for this phenomenon. First, the differences in advice to travelers between each government of the issuing countries. The French, English, Italian or Swiss governments advised their fellow citizens not to go to Egypt, while Russia considered it still possible to take bathing stays and cruises, but recommended citizens to avoid the zones of manifestations. These indications were also followed by the TOs of the issuing countries. For example, TUI (German TO) continued to commercialize Egypt, while Thomas Cook suspended its stays and offered on-site clients to be repatriated. As can be seen, the decisions taken by the issuing markets influence the recovery of tourism.

In addition, the type of stays chosen by consumers influences the stimulus. One may note that the French focus their holidays in Egypt on cultural tourism, whereas the German and Russian customers prefer the seaside stays and the cruises. Cultural tourism is more practiced in cities where demonstrations were held. For example, the French market declined by around 45% for this destination between 2012 and 2013. It then becomes necessary to find areas of tourist diversification for this destination in order to attract this clientele again. All tourist actors agree that sales have been falling since the Arab revolutions. Despite a slight recovery, they will start falling again because of the events that are taking place. However, they agree that a longer transition would be beneficial for the country to regain its stability. For some, the takeover of power by the Muslim Brotherhood would be detrimental to the development of tourism, since their ideals are contrary to this one (alcohol, swimsuit etc.): “They do not help tourism professionals, and Morsi does not make any effort.” Yet, for them, Egypt remains a country that has enormous tourism potential and is always dreaming. We will now try to understand in the next subparts what possible developments

would be possible to prevent the situation from getting worse.

In the short term, the destination will want to intensify its communication to the main issuing markets, e.g. Russia, Germany and Great Britain, in order to bring them back. Egypt also wants to move to the neighboring countries (Gulf countries), whose standard of living is constantly increasing but also towards the Egyptians who represent 40% of the tourist clientele. They will have the heart to conquer the Asian market, still very little attracted by this destination. The leitmotiv of the revival will be diversification. As we have seen above, TOs mainly sell seaside tourism, culture and cruises on the Nile. During the revolution, cultural tourism fell, and only seaside tourism continued to function. However, this tourism, which is often practiced in a closed and all-inclusive manner, is only slightly favorable to the development of the territory. Egypt therefore wants to develop new forms of tourism in order to attract new customers, but above all to ensure a more homogeneous and fair tourism development. Over the last few years, new forms of tourism in Egypt have emerged, such as hydrotherapy and balneotherapy. Hiking and trekking began to become more democratic in the desert parts of the country. In addition, religious tourism, with domestic tourists, is beginning to gain momentum. Business tourism, on the other hand, remains undeveloped, although only Cairo has good infrastructure. Alternative forms of tourism are still underdeveloped in Egypt, although ecotourism is beginning to progress. However, solidarity, participatory, responsible, rural tourism etc. could become priority areas for diversification, since they would help to relieve congestion on visited tourist sites, which are becoming increasingly delicate.

Figure 4. Tourist Arrivals in Egypt, 2004-2012



Source: World Bank (2014c), p. 1.

Figure 4 above shows how the tourism arrival to Egypt was affected after 2008 due to the economic crisis, following a strong increase from 2004 to 2008. After an increase from 2009 to 2010, a sharp decline in tourism arrival numbers is visible for 2011, recovering only slowly in 2012.

2.3 Comparison of Tunisia with Morocco and the United Arab Emirates

The political stability of the kingdom has not been shaken by the events. On the contrary, the constitutional reform and the choice in the legislative elections of a moderate Islamist party and its attachment to the monarchy prove that the Moroccans do not see their future in a violent revolution.

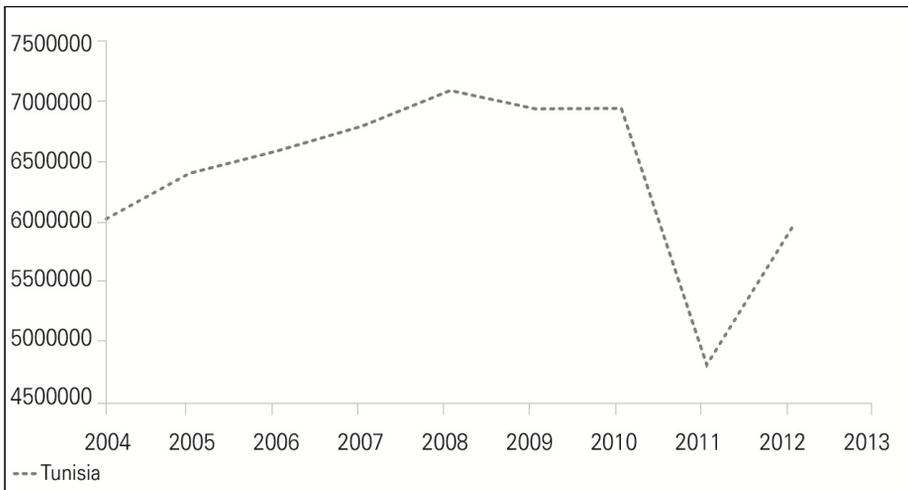
The example of neighboring countries was also perceived as a warning: the more favorable political and economic situation in Morocco already led the Moroccans to having much more to lose than their neighbors. They also discovered the “price”

(in the true sense of the word) of a revolution, seen coming back from friends or family members who worked in Libya, Tunisia, and Egypt. In short, scalded, they have no wish to experience such a crisis.

Apart from a few very limited and limited exceptions, Morocco has never developed a waterfront and seaside resorts as seen in Tunisia. Its tourist offerings are very varied, between cultural stays, sports holidays (golf, horseback riding), or nature treks in the desert. Moroccans have long developed the know-how, and have all the necessary infrastructure. Nevertheless, because of its more qualitative orientation, and despite the crisis, it does not propose a large volume of offers low cost, comparable to what one could find in Tunisia.

Morocco therefore has an opportunity to position itself as “the Mediterranean country for a holiday in the sun.” It must seize this opportunity with an active policy, from a commercial, marketing point of view, but also by strengthening the quality of its offer.

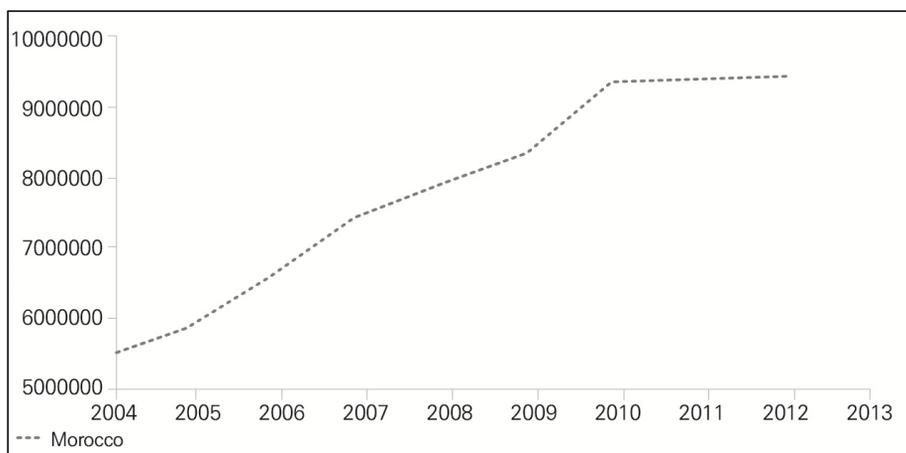
Figure 5. Tourist Arrivals in Tunisia, 2004-2012



Source: World Bank (2014b), p. 1.

Figure 5 above shows how tourist arrivals to Tunisia were affected very strongly in 2010 (after a predominantly steady growth from the 90's onwards). A strong upwards surge after 2011 is visible, the tourism arrival numbers of 2012 however were not at the pre-Arab Spring level by the end of 2012.

Figure 6. Tourist Arrivals in Morocco, 2004-2012



Source: World Bank (2014d), p. 1.

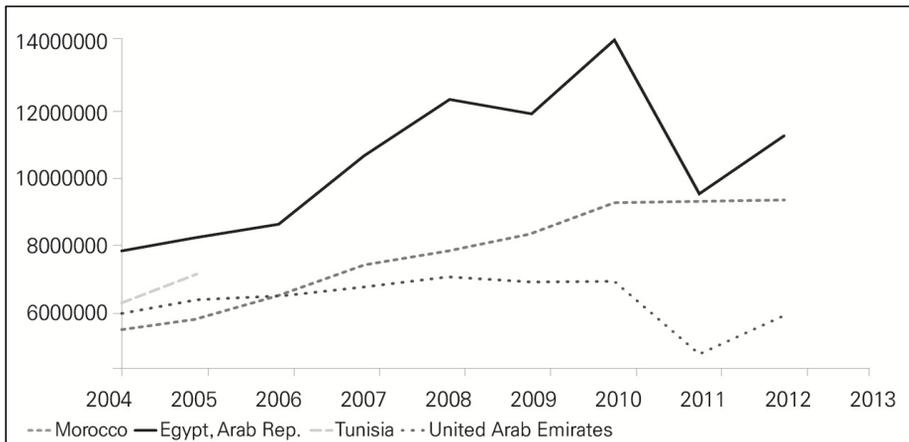
The year 2013 meant a gain in tourism of 7% for Morocco in comparison to the previous year with a total of 10,046,000 visitors. However, much welcomed tourism expenditure to the country actually declined by 0.5% in 2013 (Al Arabiya News 2014, p. 1).

United Arab Emirates (UAE)

Tourism continues to rise, particularly thanks to the inhabitants of the Gulf countries. Now they prefer to spend in the huge malls and visit the Emirate rather than the countries of North Africa or Lebanon, to the tense political situation.

The Russians and the Chinese are also increasingly attracted by Dubai, which enjoys an excellent image and modern and attractive tourist facilities, grand attractions and an open atmosphere where it is good to relax, comments Mohamed Naser Ebrahim, partner of Hanlin Tourism & Travel Services LLC. The tourism industry, the first in the Emirate, will continue to prosper for at least the next decade. The entrepreneur has just launched, in partnership with a Chinese partner, a travel agency precisely dedicated to Russian and Chinese tourists, and then, thirdly, German. Mohamed Naser Ebrahim stressed the importance of service quality and their synergies. Like the construction of Dubai, designed on the model of Singapore as a trading platform, Dubai's services and logistics are built for great consistency.

Figure 7. International Tourism, Number of Arrivals



Source: World Bank (2014a), p. 1.

Figure 7 shows the strong decline in tourism arrival numbers of Egypt and Tunisia after 2010. Morocco's data shows stagnation but no decline from 2010 to 2012, while there is no data available after 2005 for the UAE by the World Bank.

Tourism benefited from the Arab Spring by attracting visitors from North African and Gulf countries who see Dubai as a safe haven destination. With 11.6 million

admissions in 2014 (+ 5.6%), the hotel occupancy rate exceeds 80% and tourism generates about 18% of Dubai's GDP, the 4th most visited city in the world. Nevertheless, the combined effect of the appreciation of the dollar (and consequently of the dirham) and the economic slowdown in Russia and China had a significant impact on the number of Russian, Chinese and even European tourists in 2015 and 2016, and subsequently the income generated by this sector.

III. Recommendations

Tunisian tourist attractions are strongly represented by seaside tourism. The tourist season is mainly over the summer and spread out over a fairly short duration of about three months, due to the low level of development for alternative tourism and low valuation of the potential of Tunisia in this area. Despite the landscape and natural richness within the country, as in the case of the Sahara or forest ecosystems, these resources are poorly exploited and the development of ecotourism remains at an embryonic stage. Low consumption of local products and services by tourists outside hotels remains, in most cases, confined to the hotel and not many tourists consume local products or services, resulting in a low impact on local development. The all-inclusive formulas have devalued the tourist potential; Tunisia's prices are much reduced, which generates low revenues, compared to the countries of the Mediterranean. Tunisian authorities must now promote the tourism industry by launching aggressive marketing campaigns to restore consumer confidence and improve the country's image.

3.1 Increasing the Promotional Budget

The creation of a large tourism promotion and marketing department, a structure specializing in the professional organization of tourist events, and a directorate of

studies, analyzes and prospects will be necessary. The latter will have to provide most of the basic plans and policies for tourism development, nationally and internationally, accelerate the realization of strategic studies on tourism promotion and marketing and increase substantially the promotion budget, the multiplication of tourist offices abroad, which will implement its marketing, promotion and communication strategy in partnership with the main tour operators, tactically and entirely focused on sales support.

3.2 Giving Financial and Tax Incentives

To offer more benefits to tourists visiting Tunisia, the government can also lower the price on airline tickets. Currently, ticket prices include various taxes called airport taxes, which add to the starting value of the ticket. Travel agencies, airlines and websites are obliged to announce the reduction of ticket prices.

3.3 Creating Alliances with the Media

The creation of new partnerships between tourism and the media offers an excellent opportunity for dialogue. Tourism, like the media, has the noble mission of bringing people around the world, bringing cultures closer together and promoting the values of tolerance and solidarity.

The media are important players in the tourism sector, not only to disseminate information but also to reach out to the public and raise awareness of the sector and the principles underpinning sustainable tourism development. Tunisia is an example for the world of a country that has consolidated its democracy, as evidenced by the recent award of the Nobel Peace Prize to the Quartet of National Dialogue. Tunisia is also a destination of excellence and a major player, in the long term, in the region and in the world (Chandonnet 2002).

Accuracy, Accountability and Transparency: It is within these parameters that

journalists should work. The actors in the tourism sector must connect with journalists in an appropriate manner and with adequate means, as the media are the main vehicle for reaching the general public.

In this regard, the impact of the media, especially journalists today, has a great impact on the image and positioning of countries. There is a need not only for professional coverage of crises, but also for access to information and the facilitation of resources, in a timely manner, by the authorities responsible for tourism.

On the other hand, the Internet has become an increasingly used medium during emergencies. It allows you to transmit your information without filter to many people simultaneously as well as the possibility of providing additional information. Today, everyone is a journalist because it is enough to have a camera or a mobile phone to make a video or take a picture on the crisis and publish it on the Internet (Asia Pacific Economic Cooperation 2006).

Given the growing importance of this digital medium, government authorities or institutions must be present in the information flow offered on the internet. The challenge is to manage the bad buzz on the Internet to avoid that social media and traditional media in turn revive the buzz in a negative spiral and increase the severity as well as the duration of the crisis. The harmonization of the information conveyed on all media is fundamental in a crisis situation, as the propagation of superfluous or contradictory information can create confusion and increase the anxiety and sometimes cause panic.

3.4 Providing Added Value to Tourists

The Tunisian tourism sector remains strongly dominated by seaside tourism, which accounts for much of the revenue. Nevertheless, this form of tourism is characterized by its low sustainability: low prices, high seasonality, a customer that consumes few local products, a low contribution to the development of inland regions, overexploitation of resources and negative impacts on the environment.

Other recommendations would be to: enable diversity of attractions (tourism of discovery, tourism health and well-being, tourism freshness in the interior and mountainous regions); spread the tourist season; develop and promote intercessions and winter; strengthen local tourist information strengthening markets that are not dependent on air transport; bring out an offer adapted to domestic tourism; the establishment of tourist attractions that highlight the wealth of resource biological sciences and raise awareness of the problems of extinction of rare species; and the financing of actions to conserve biodiversity through ecological tourism (tariffs for access to parks and nature reserves).

3.5 Increasing Cooperation Internally and Internationally

Creating frameworks for meetings and collaboration, promoting relationships between the internal stakeholders (hoteliers, travel agencies, industrialists and traders) and external stakeholders Tourism Offices Program and supporting them (especially in the field of technologies), providing incentives for the role of webmaster in specialized tourism entities (recruitment or freelance).

Follow the market trend and understand the consumer develop a relevant site in the appropriate language, optimize the Internet as a medium and inspire visual content, build relationships campaigns and displays on social networks, Designing the Role: Management of the communities (ensuring the watch, moderating opinions and measuring the return of actions).

Dynamizing blogs and social networks, maintaining a large presence on social networks (25% of site visits come from Facebook). Displaying the image of bloggers, and share trips (the Internet user seeks consideration and attention), develop partnership relationships with key leaders of social networks with the manager of the communities. Establishing an SEO strategy to get ahead of the competition (keyword, the links that point to the site); Paid referencin: information, links to sites. Specific location (banner of known sites), Follow-up of positioning “Ranking” on aggregators (Badawy 2011).

Monitoring reputation: Controlling Internet communities with access to community sites, Creating a network of community Internet users who can defend the interests and image + key leaders Watch videos and photos published on sharing platforms such as “Youtube” and “dailymotion.”

3.6 Upgrading Tunisia’s Image

Tunisia benefits from a great diversity of cultural and natural sites and a variety of specific intangible heritage components. These resources constitute a sustainable resource for the diversification of the tourist offer and for the development of new products, responding to the world market evolution. In order to encourage the sustainable exploitation of cultural and natural heritage, the State must establish a national strategy for the development and promotion of cultural and natural tourism. The National Map of Cultural and Natural Tourism is one of the major components of the action plan to be taken into consideration.

3.7 Tourism Quality Management Program

The process of obtaining this label involves well-defined criteria and commitments (quality of reception, availability of information, quality of services, encouraging the discovery of Tunisia as a destination, competence and qualification of staff, quality of listening). The aim of this approach is to increase customer loyalty, gain market visibility, ensure the sustainability of companies and ensure quality diagnosis through upstream support and an impartial and transparent audit.

Successful nurturing of a quality label is dependent on an effective training system. In this connection, a reform should be initiated as a first step and the modernization of training schools should lead to the creation of a training agency in the tourist trades whose main task will be to consolidate the interactivity between training and

profession.

The development of a new standard for hotel classification, aimed at improving the visibility of hotel units and bringing them into line with international standards would be a valuable measure. This signifies a comprehensive approach to the whole chain of services in the tourism industry. Tunisian tourism has no choice but to offer total quality to improve its resilience to the vagaries of the conjuncture.

3.8 Promoting Cultural Tourism

Tunisia is a popular destination for tourists around the world, thanks to its strategic geographical position, the climate of political and social stability, its beautiful golden beaches, its splendid, recent or renovated hotels, all along the coast, next to a large choice of luxurious clubs, to its seaside resorts offering many leisure activities and to its sports, wellness and thalasso activities.

With all these assets, Tunisia is also a land full of history, a crossroads of all the civilizations of the Mediterranean.

Its cultural and civilizational specificities also make it a tourist attraction to discover: archaeological sites, historical monuments and museums and to learn about Arts and Crafts or to attend cultural events such as festivals, exhibitions and even conferences. The heritage attracts a large number of tourists and can be visited throughout the year.

After years of neglect, cultural tourism is slowly beginning to take shape in Tunisia. The rich heritage of Tunisia is very important and covers a large part of the civilizations of the Mediterranean: Berber, Punic, Roman, Byzantine, Arab, Turkish, Andalusian, etc. With the world's largest collection of Roman mosaics (Bardo Museum), the main remnants of Carthage civilization, countless ancient sites, remarkably preserved medina and exceptional monuments (El Jem Colosseum, Mausoleum and Capitol of Dougga, Grand Mosques of Kairouan and Tunis ...), Tunisia is a leading destination for cultural tourism. One of the world's largest archaeological museums, it boasts some of the

world's foremost monuments, the first mosque founded in the Maghreb, some of the best preserved medinas in the Arab world and no less than seven sites and monuments inscribed by UNESCO on the World Heritage List.

The cultural and heritage landscape of the country is marked by the wealth and peculiarities of its history. These riches can be a lever to boost the national tourism product, namely: Carthage, which is founded by the Phoenicians, is one of the largest cities in the ancient world. From its earliest days tourists can visit the sanctuary of “Baal” and “Tanit” as well as several residential quarters, the Roman period has left impressive vestiges like the immense Antonin baths, sculpted columns and capitals, the amphitheater, amphitheater, etc. The town of Dougga is entirely preserved with monuments of all beauties (the Capitol, the Theater and an exceptional Numidian mausoleum).

The amphitheater of El Jem, Colossal monument of blond stone, it is the third of the Roman world by its dimensions and one of the best preserved. In addition, Bulla Regia is famous for its beautiful Roman houses with an underground floor ..., etc. In this respect, cultural tourism is not merely a question of placing the tourist in front of a monument, but must be developed around a program of enhancement of sites and museums, a quality framework to publicize a heritage, a history and better understand the current specificities of Tunisia.

In the context of increased interest in cultural tourism in the world and its role in enriching the tourism sector, Tunisia has worked to promote this sector in the service of economic development, especially as development indicators hence the capacity of countries to exploit the cultural component in development plans.

As a result, Tunisia has chosen to put culture at the service of the tourist sector, within the framework of an approach aimed at integrating culture into the economic circuit, while at the same time ensuring the preservation of the attributes of national identity and its specificities cultural and civilization.

The safeguarding of heritage and its cultural enhancement in the service of tourism constitutes a challenge for Tunisia to promote cultural tourism, particularly as regards the protection of archaeological sites, at the service of cultural and ecological tourism.

In order to highlight this heritage, the Ministry of Tourism is actively engaged in inventorying all the components of this tangible and intangible heritage, in collaboration with the Ministries of Culture and Heritage Preservation.

In order to do so, a very ambitious study begun in July 2008 envisages in its final phase, planned for the end of 2009, to set up a Geographic Information System with an interactive map containing databases of cultural and natural tourism of Tunisia. This map of cultural and natural tourism will be a working tool and a reference document, thus enabling everyone (promoters, actors and operators in the sector) to see cultural tourism in a clearer way and to roadmap.

In addition, a national plan has been implemented since 2000 to promote cultural tourism, including the development of archaeological sites, the restoration of historic monuments and the establishment of a program for integration of the various components of the heritage in tourist circuits in order to attract the greatest number of tourists and penetrate new markets.

Among the targeted sites are the archaeological parks of Carthage, Oudhna, Dougga and Sbeitla, in addition to the Ennahli environmental park, the Monastir cliff park and the Ichkeul, Bouhedma and Chaâmbi national parks, the Utique archaeological sites, Bulla Regia and Kerkouane, in addition to the restoration of museum pieces and their treatment by the competent departments of the heritage laboratory. Restoration works included the museums of El Jem and Djerba, in addition to the creation of new museums and the opening of several archaeological sites to visitors in order to diversify the offer in the heritage field.

In this context, the Agency for the Promotion of Heritage and Cultural Development works to enshrine the principle of decentralization in safeguarding the rich national heritage, while integrating cultural industries to promote heritage through replicas of archaeological pieces, leaflets and postcards (Hazbun 2008).

3.9 Promoting Business Tourism

To highlight the advantages not yet exploited in the business tourism sector, including congress and events, while defending the interests of the operators operating in this sector, these are the main objectives to create a commission within the Ministry of Tourism.

The regulation of business tourism, by means of a specification defining the rights and duties of travel agencies wishing to operate a cultural or archaeological site for the organization of special events, is also a challenge. In the short, medium or long term, it is important not only to improve the infrastructure, but above all to consolidate know-how and highlight the integration of Tunisian traditions into the modernity. This integration is an essential component for Tunisia to be an investment destination for foreign businessmen. This is the case, for example, for Marrakech and Istanbul, the major destinations competing in business tourism.

This commission for business tourism will find the means – in the form of a workshop, projects, cooperation – to achieve its objectives, to increase the foreign exchange earnings of this promising and successful niche and to achieve transformation of this sector.

Finally, the business tourism sector may be the most vulnerable to the current situation of Tunisian tourism and all stakeholders must send strong signals of tranquility and stability in the country (Oxford Business Group 2010).

IV. Conclusion

The Arab Spring situation requires the South Mediterranean countries to develop innovative sectoral strategies to diversify tourism investment, supply and employment, and to better segment their tourism market. Unless bursting and wait-and-see prevail, the fall of autocratic regimes should be an opportunity for new governments to upgrade

and democratize their country's tourism sector by encouraging good practices (Private and public sectors, local populations, civil society) to make their voices heard and to defend their interests. Given the demands made by the Arab populations and the delicacy of the structural changes to be initiated, only this type of orientation, based on consensus and ownership, seems to enable tourism development to accompany the democratic transition of these countries.

As this work has shown, Tunisia must change its tourism policy in order to survive in this growing and increasingly competitive economic segment and stay in the tourism race. That is why Tunisia has opened the door to new opportunities to strengthen Euro-Mediterranean relations, which were often stymied in the past by the region's autocratic regimes. Both sides, the EU and Tunisia, now need to focus urgently on developing their partnership. This would also be an important sign that the EU is supporting Tunisia in its transition process.

Tourism in Tunisia experienced a worst loss after the revolution, according to tourism indicators, which fell dramatically by two million tourists and 3,000 jobs lost, with a 33% drop in revenue in 2011. Nevertheless, this decline has resulted in the need for a Tunisian tourism revolution to achieve a goal consistent with expectations. Observers have criticized the leaders because of their lack of innovation and good promotion of tourism products in Tunisia.

Despite the diversification of tourism products from the rich cultural heritage, ecological tourism and responsible tourism, Saharan tourism, medical tourism and thermal tourism in Tunisia has remained enclosed in seaside tourism (Sun, Sea, Sand) and the development of different types of tourism.

The tourism sector situation has created a need for development and enhancement of various tourist offerings, to improve the infrastructure and mutate quantity tourism to quality tourism.

Tunisian tourism needs renewal to become among the flagship destinations through investment and efforts in marketing and promotions (Asia-Pacific Economic Cooperation 2006).

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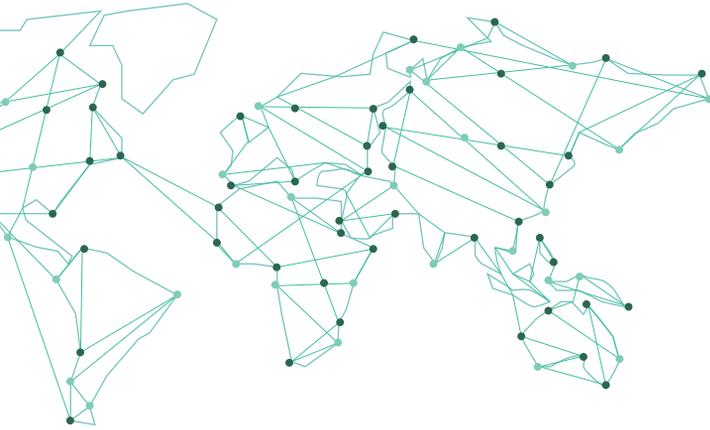
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