



JOURNAL OF SOCIAL AND HUMANITIES SCIENCES RESEARCH



2017

Vol:4 / Issue:13

pp.1325-1337

Economics and Administration, Tourism and Tourism Management, History, Culture, Religion, Psychology, Sociology, Fine Arts, Engineering, Architecture, Language, Literature, Educational Sciences, Pedagogy & Other Disciplines

Article Arrival Date (Makale Geliş Tarihi) 01/11/2017

The Published Rel. Date (Makale Yayın Kabul Tarihi) 05/12/2017

The Published Date (Yayınlanma Tarihi 05.12.2017)

TURKEY MARINE TOURISM CLUSTERING SITUATION ANALYSIS ¹

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ABSTRACT

In this study performed with the purpose of ensuring that the development of the tourism industry which is as a significant part of economic development becomes well and planned and of enabling it sustainable, a pilot study which can be the basis for the macro level strategic plan has emerged by conducting tourism cluster and current situation analysis. With the study which is expected to contribute significantly to economic planning and development, Clustering analyzes were carried out by selecting marine tourism from the sub-sectors which are considered to be priority in accordance with the results of competitiveness analyzes of the existing tourism sub-sectors. Both quantitative and qualitative research techniques were used as scientific research methods of the study. Within these methods, both secondary and primary data collection techniques have been applied. In the analysis of the collected data, the methods such as Diamond Modeling, Clustering, Comparison, Strategic Thinking, which have validity and reliability in international competitiveness, have been applied and tried to create a pioneer in the macro level tourism strategic plan. According to the results of the research, it is foreseen that the marine tourism should be developed primarily in the sectors that need to be developed, the foreseen sectors were analyzed by detailed sectoral clustering studies, value chains were revealed, sector players and their roles were identified, missing players were identified, ratings of communication between players were revealed, moreover, the basis of cluster development work was prepared and the whole system was modeled. In accordance with the result of research, it is recommended that macro level implementation projects based on the clustering approach should be done as soon as possible. In addition, it is needed that sectoral cluster councils and implementation commissions should be established at each destination level, and sub-implementation projects should be identified and sector cluster development studies carried out accordingly.

Keywords:

1. INTRODUCTION

Today's world, in which the globalization process continues at full speed, has now become like a village through basic variables (economic, sociological, technological, etc.) that affect the process. More importantly, globalization brings the key factors to the top together with the competitiveness of the firm-sector-region-country. In other words, nations that can achieve sustainable competitive advantage can survive economically and continue to the race of existence. As it is known, strategy is as old as human history and it is a method used in art of war. As a matter of fact, all wars are won by strategies. This method, which has been used since centuries, has started to take place in the economic literature especially after the 1950s. In other words, now economic wars are being carried out with strategies. In this context, it has become possible by means of strategies to rise to a competitive position therefore to fulfill the sectoral and regional development.

Depending on the strategy and the strategies, sectoral competitiveness is in company strategies (global and local) as well as reflected in regional development plans. As a matter of fact, the United States (USA), states being a member of the European Union (EU) and developing countries are putting their competitiveness at the focal point of their planning work. As for the Approaches such as value chain and clustering, they emerge as effective methods to implement and obtain competitive strategies. When we examine our country in particular,

¹ "This work was supported by Research Fund of the Mugla Sitki Kocman University. Project Number: 17/219" Thanks to Research Fund of the Mugla Sitki Kocman University for their supports

Strategic planning and strategic management, which is considered as the final stage of our transition to national planning, has become extended and been implemented since 2000 years. The Competition Based Development Policy, which we have also adopted with the Lisbon Criteria, is the cornerstone of the economic development strategic plans both in terms of the member states of the EU and of our country. In this context, it is envisaged to make competition based sectoral development plans in accordance with the 9th Development Plan and the National Development Policy which State Planning Organization (DPT) has prepared. It is aimed with this study which was performed for the reasons mentioned above that the regional development will be realized by making the macro-level strategic plan of the marine tourism sector, which has an important place in terms of the national economy, and by enabling the transformation and development of the sector.

Many studies have been carried out on competitiveness and obtaining of competitiveness which have become an important agenda item particularly in regional development strategies, and which have been formed as a direct point of reference by leaving the principle of equality. Indeed, rising to a competitive position and making it sustainable has attracted the attention of many researchers and has been conducted them to channel their work into this direction. In this context, it has been started to develop methods in order to reach regional development goals by achieving sectoral competitiveness. The clustering approach and various analysis techniques depending on this are at the top of these methods which are used effectively.

The most important thing to note in this context is; the cluster must be considered as a tool, not as a goal. Because our goal is to realize the happiness of our people and make it sustainable. The use of appropriate techniques to achieve this goal is seen as a requirement of modern development. Clusters influence competition in three main ways; by (1) increasing the productivity of enterprises established in the cluster, (2) directing innovation that will increase productivity in the future and ensure the creation of new products, (3) encouraging the emergence of new business areas that expand and strengthen the cluster itself. Sectoral clusters provide to businesses involved in the cluster benefits as if they are businesses with formal connections to large-scale or other businesses, without waiving their flexibility.

To summarize, industrial clusters; (1) provides players with access to new and complementary technology in the cluster, (2) conduces to achieve the synergy economy or the economy of mutually interdependent activities, (3) distributes the risks, (4) realizes to conduct joint R & D studies with suppliers and users, (5) demonstrates a defensive approach to reduce competition, (6) reveals mutual benefits achieved from the combined use of complementary assets and information, (7) accelerates the learning process, (8) reduces transaction costs, (9) forms an entry barrier within the market and/or can overcome the barriers.

2. SUBJECT, SCOPE AND LIMITS OF THE RESEARCH

The professional activities which are carried out by marine vessels at sea, which are aimed for tourism and other professional activities directly supporting them are defined as "Marine Tourism". In our country, the Marine Tourism income constitutes about 20% of total tourism income. In the field of maritime tourism, the most relevant and competent institution against the public and the sector is the Chamber of Shipping within the framework of the responsibilities determined by the law. With the Law for the Encouragement of Tourism; The name of the sector which had been "Yacht Tourism" was changed and expanded as "Marine Tourism", "Cruise Ship" and "Cruise Ports", "Daily Trip Boating" are included in the scope of Law. For this reason, marine tourism is used instead of yacht tourism in the study. The main support of the research project on national scale is the action plan and goals of Turkey Tourism Strategy 2023 of the Ministry of Culture and Tourism. It was focused in this study on diversification and dissemination activities in tourism within the main purpose of reducing the negative effects created by mass tourism and increasing tourism revenues. The study also emphasizes enabling the sustainable competitiveness of the destinations with the headings such as planning, organizing, quality of service, strengthening infrastructure and superstructure, r&d, branding (Ministry of Culture and Tourism, Turkey Tourism Strategy 2023 Action Plan, 2007). This study, dealing with the subject of sustainable competition for Mugla Region Marine tourism, fully coincides with the mentioned strategic plan. Moreover, the study coincides with the plan in terms of the effective use of non-renewable and scarce coastal resources dealt by the Coastal Master Plan which was prepared by the Ministry of Transport in 2011 (Ministry of Transport Tourism Coastal Structures Master Plan Studies, 2011).

2.1. Scope of the Research

The research, as the need of its purpose, requires to deal in a holistic way with the effectiveness of Marine tourism sector stationed in Mugla Region, interaction of internal and external conditions and adopts the system approach. The Diamond Model (Porter, 1999) used in the research allows the system to be divided into subsystems. Since the research was dealt with the view of holistic perspective and in a regional context, it

was based on modern and postmodern theories of management. The scope of the research is drawn by institutional theory and new institutional theory (Burns and Stalker, 1994, Gulati, 1998, Palmer and Biggart, 2002, Powell and DiMaggio, 1983, 1991, Selznick, 1957) in terms of examining the structure and functioning of institutions operating in a particular environment; resource dependency theory (Barney, 1991; Mizruchi and Mina, 2002; Oliver, 1997; Pfeffer and Salancik, 1978) and the theory of population ecology (Hannan and Freeman, 1977) in terms of measuring whether competing or not, the rate of change and the ability to use resources; the studies handling the strategy and structure (Alfred D. Chandler, 1962; Miles and Snow, 1978, Mintzberg, 1979), since decision-makers (entrepreneurs, management groups) evaluate the opportunities and threats in the region by constantly monitoring the conditions that are constantly affecting maritime tourism, and considering weaknesses and strengths of the sector in terms of resource and structural characteristics, clusters and networks approaches (Porter, 1990, 2001; Wasserman and Faust, 1994) for evaluating network relations in a stationed sector in a region. At the same time, the study does not ignore the management models which are located after the post modern management theories since they handle the subject in terms of the needs and expectations of the final consumer (yacht tourist), quality, sectoral performance indicators and which are named as the current management approaches. The concept of governance included in the scope of the research is one of the most up-to-date discussions and research topics in management and organization, tourism literature. In this research, the governance which takes place as state in Diamond Model and which includes minimum state structure understanding and public-private mixture management models in the new period, being as multi-actored, local, gives priority to rationality within network relations was included in the scope as a management model.

It has also benefited from the tourism clusters literature (Bulu and Eraslan, 2004, Bulu and Eraslan, 2008, Bulu et al., 2007, Cunha and Cunha, 2005, Erkus-Ozturk, 2009; Novelli, 2006; Yuzbasioglu et al., 2012) in terms of nets and relationships that are very important for the tourism industry. The macro scope of the research is related to the regional development (Erkus-Ozturk, 2009) since it studies the contributions made by the sector operating in one region to the socio-economic indicators of the region. Since the research includes a very detailed analysis that covers sources related to marine tourism, as giving an idea of sustainability, it can also contribute to sustainable tourism discussions, in a limited way.

2.2. Question/Problem of The Research

The basic question of the research can be summarized as "Why Turkey can not capture the competitive advantage in marine tourism". The research and reports of the Ministry of Culture and Tourism, Turkish Union of Chambers and Exchange Commodities, academicians, the international associations and organizations (such as the OECD and the UNWTO) reveal that marine tourism can not have a steady development in the general tourism pie in Turkey and that marine tourism has problems. To give an example at regional level, development agencies, the chambers and Exchange commodities in the region, researchers state at every opportunity that the Mugla region, which has the highest marine tourism potential for Turkey with the rate as 36% falls back in competition. In addition to all these, in a related and supportive context, TUBITAK project named as "Information Sharing Networks of Yacht Building Groups in Turkey, Comparative Analysis of Intellectual Capital and Institutional Environment in terms of Innovation and Performance Effects" conducted by Sarvan et al. contains a detailed analysis of a sector that has a significant lack of data in its context in terms of problems, sources of problems and proposals of solutions. Further research and strategic plans and programs are needed to sustain competitive advantage in maritime tourism in the light of the studies conducted as based on both country and region and sector. The "Yacht Tourism Master Plan" (1992) was followed in 2011 by "Tourism Planning of the Coastal Master Plan" of the Ministry of Transportation and the Chamber of Shipping in April 2015 referred to the "Yacht, Present and Sustainability of Marine Tourism" in an enclosure prepared by itself. All sectoral and public studies have created the infrastructure for the question of research and created inspiration for the research to conduct a scientific analysis and develop solution proposal without losing the tourism perspective.

The coasts play important roles in the economic and social activities of the region, city and even the country they are related to, as a transitional zone between land and sea. Therefore, the advantages and privileges arising from the potentials of the coastal areas are decisive in the economic, natural, social and spatial development and orientation of the coastal settlements to which they relate. As a coastal use area and activity, marine tourism is one of the sectors that contributes to the country's economy and causes changes in the coastal areas and settlements that are the areas of activity. Marine tourism is influencing socio-economic structure both in terms of industrial structure and regional scale by gathering urban uses in their surroundings and becoming a point of attraction. "Tourism", one of the sectors that uses coastal area very common, gained a quality which

develops investments and business volume, creates income, provides foreign exchange, opens employment areas and affects social and cultural life, achieves important social functions in terms of political way with great dimensions gained in both internationally and nationally. Especially in international tourism, the numerical increase in tourism expenditures has made tourism one of the top sectors in international trade. Especially, the superiority of tourism types such as marine tourism and health tourism in terms of expenditure and income, benefit and cost have been recognized and both developed and developing countries have turned to these sectors in the context of diversification of tourism activities.

However; the tourism sector is experiencing sharing problems with other sectors demanding the use of same coastal areas. The biggest problem experienced in coastal areas is the use of land. Especially after the 1960's, as a result of internal tourism movements, land was used prodigially by private people, time to time even by public institutions in the coasts of Marmaris, Aegean and Mediterranean. In this development, industrialists, big and small capital owners, tourism investors, citizens having land in tourism areas, real estate agents, middle classes and public institutions played different roles. Because each one has different roles with different level in sharing the shores. Problems arising in the sharing of these areas cause conflicts between interest groups. As a matter of fact, Gocek Marina has come to the fore with conflicts between public authorities and local people more recently. The studies addressing maritime tourism have focused on the benefits of the industry, but have not adequately examined the sectoral effects of the interest groups (all entrepreneurs investing in the industry, big capital making investing in tourism sector, small entrepreneurs making tourism and resting investments, people who were residents before the coastal settlement opened to the tourism, real estate agents, builders, middle classes, labor class and marginal sector members who are in the level of not having share from the increase in speculative value by purchasing from the coastal areas, public bureaucracy) who are having interest on the coast which is scarce and not renewable source.

3. LITERATURE SCANNING AND EVALUATING

It was explicitly stated in "TR32 REGION Yachting Activities "in the information note (2011) of GEKA that Turkey who is not surrounded by the sea on three sides can not fully evaluate these resources, and investments and necessary measures are not taken to improve this demand or promote the related areas beyond the existing natural, historical and cultural potential of the southern and western coasts and the related attraction features. Due to its geographical features, Turkey has considerable advantages in terms of marine tourism. The fact that Turkey is situated on a peninsula that connects European and Asian continents and that the three sides are surrounded by the sea reveals its importance in terms of marine tourism. In particular, the interesting geomorphological features of the Turkish coasts, the natural coast which is sheltered and sometimes meets with forest, the lack of coastal erosion, historical and cultural richness of it are other factors that increase the importance of our country in terms of marine tourism. The Aegean coast has a great potential for yachting due to its geographical location with its short sheltered coastline, vegetation and short-range navigation to the nearby islands. In addition, the geographical proximity to the countries of France, Spain, Italy, Greece which are developed in terms of marine tourism and the Adriatic coasts and the presence of coasts in the Mediterranean, which is an inland sea, also provide advantages for Turkey (Acikbas, 2006; Sarvan et al., 2010). Since the main point of view of this study was competitiveness, marine tourism and regional development, and the literature, it was mainly benefited from strategic management and tourism literature in the study.

4. CLUSTER AND NETWORKS IN TOURISM

The existence of marine tourism industrial concentration in the Mugla region, which is the research area, made it as necessary to examine literatures of cluster and nets. Porter (1998) describes the cluster as concentration of the co-operative and related players (academicians, practitioners, decision-makers, tourism stakeholders) who are adding value to each other, who are playing, or having potential for, an effective role as either directly or indirectly in the subject of production of a product or service linked to each other with the production chain (Porter, 1998). Clusters are seen as networks in which all players within a city, region, country, continent are connected to each other. There is no research on the relationship structure of Mugla Region Maritime tourism within the literature. According to Porter's widely accepted cluster definition (1998), the network of relationships is an important element for clusters. Therefore, the sector is considered as an industrial area in the research because there is not enough data about Mugla Marine tourism network within the scope of tourism and travel industry. However, this gap in the literature could not be ignored and local, national, global network of relationships analysis were included to the research from the perspective of regional governance. Due to product distinction, tourism has certain geographical locations. It is widely recognized that clusters are a powerful regional development tool (Porter, 2002; Rocha, 2004; Sarvan et al., 2012) and that tourism is a strong instrument of regional industry competition (Engelstoft et al., 2006), it is important to discuss the role

of tourism clusters in regional politics. Moreover, the criterion for classification of a given area / zone is 'tourism cluster' (Braun, 2005, Santos et al., 2008). Despite the broad acceptance of the concept of clustering, there is a lack of consistent and accepted methodology by all in the subject of formulating the criteria which define the limits and distinguish simply in accordance with the geographical concentration or more advanced network systems by which tourism clusters can still be distinguished from a real cluster (Capone and Boix, 2005; Eraslan, 2008, Arsezen and Yuzbasioglu, 2015). The cluster concept is suitable for certain characteristics of tourism activities. Tourism product specificity means a deep link with the local region, encouraging joint action by related businesses to increase the value and attractiveness of the tourism destination. In most economic activities, the product reaches consumers. However, the tourism product depends on a specific region. To consume tourism products, customers have to travel. The prospective cluster of tourism activities is expanded by the features of other tourism activities such as solidarity and complementarity among local actors, integration of local culture and heritage (Cunha and Cunha, 2005; Arsezen and Yuzbasioglu, 2015). As stated, the attractiveness of a destination depends on its ability to differentiate and the value of its tourism product.

Eraslan et al. (2010) emphasizes that tourism is not based solely on the attractiveness of the main attractions (the coasts and historical regions), it is also based on the quality and comfort of the services of the hotels, restaurants, souvenir shops, airports, mean of transportation etc. In this context, the cluster and network profile of the Mugla Region marine tourism, cluster phase and development level will be tried to be determined in the study.

5. DIAMOND MODEL

Porter (1990) explains that geographical concentration has increased local competitive power in Diamond Model. According to the model, harmonious and strong relations between buyer, supplier and other institutions are important for the performance of the cluster. Due to the alliances and coalitions between businesses, competition is at the level of supply chains, networks or clusters, which encourages cluster formation (Wilk and Fensterseifer, 2003). It is essential to create and to be able to maintain a competitive advantage for the long-term sustainability of both businesses and regions and the countries (Porter, 1990). In the same way, the sustainability of a cluster depends on this, as well. (Bulu and Eraslan, 2008). Therefore, countries, regions and, of course, clusters must do competition and strategy analysis and behave accordingly. There are many competition and strategy analysis methods, and Porter's diamond method is dynamic one among them (Bulu and Eraslan, 2008). Porter argues that the economic growth depends on clusters and analyzes this development with his diamond model. This diamond model consists of four main factors; as demand situations, production situations, strategies, structures and competitiveness of related and supporting industries and companies, and two external factors; as state and luck (Porter, 1990). The reasons why Porter's Diamond Model is preferred in this study are listed below:

- ✓ Porter's diamond model is considered to be one of the most suitable models for exploring the reasons behind the competitive power gained by a national sector in international trade and making general inferences (Gurpınar and Barca, 2007).
- ✓ In Porter's Diamond Model it is possible to see the entire system as a process with positive and negative effects. The diamond model was found to be suitable for study because it will be tried to investigate the whole and positive/negative aspects of dynamic relations within the framework of system approach in the study.
- ✓ It collectively handles the determinants of competitive advantage within the system approach. With its this aspect, it overlaps with the level of analysis of the study.
- ✓ It has a potential to be reduced to particular issue in order to reach a more valid paradigm. Since the particular issue in this study is Marine Tourism and Mugla, The model was found suitable for the study.
- ✓ It contains key factors and key variables that influence competitive advantage. As stated in the objectives of the project, the analyzes will be conducted over these main factors and variables.
- ✓ It allows you to analyze the factors that affect competition both individually and together. In this way, it has been thought that it is suitable for testing with the structural equation modeling described in the method of research.

- ✓ The diamond model also represents the total competitiveness position of a sector at the same time. It allows for a systematic analysis with its this feature.
- ✓ The diamond model has been widely applied successfully by many researchers and experts (Eraslan et al., 2008). In this respect, the study can be verified with literature support.

6. MARINE TOURISM

It is necessary to summarize the general concepts and definitions of marine tourism and yacht profile in terms of determining the field of study. According to the Marine Tourism Regulation "Yacht" term refers to sea vessel which is built in yacht form, used for sightseeing and sports purposes, whose yachtsman number is not exceeding 36, which doesn't have the property of cargo and passenger ship, which is stated as "Commercial Yacht" or "Private Yacht" in tonnage documents (measurement certificate) (Acikbas, 2006). The person who participates personally into a yacht travel and use yacht is called as yachtsman. Marine tourism is the all tourist activities that consist of yacht, sea cruise and marina, that take place between the arrival of the tourist to the yacht and the leaving of the yacht after a certain cruise. According to the Marine Tourism Regulation, the places which form potential for sea tourism in order to develop marine tourism in the country, which were declared with the approval view of the Council of Ministers and the Chief of General Staff, are called "Yachting Region". According to the Marine Tourism Regulation, the name of the marina means the the places determined as Main Marina, Secondary Marina, Yacht Docking Sites and Boat Yards. Marinas are classified and documented according to the qualifications of the sub and superstructure determined in the Regulation and, in addition to these, to the facilities they provide (The Law for Encouragement of Marine Tourism, 2007).

Despite the Yachting, defined as a resort-based leisure and leisure industry that has become very popular in recent years, comes into prominence in the Caribbean Islands and the Mediterranean financial, industrial and physical area, it is also being made in the America, Africa, Asia and the South Pacific in the world (Acikbas, 2006). The Mediterranean Region is one of the important yacht tourism centers of the world with its temperate climate, protected bays, geography consisting of many countries with different cultures along the coast, natural and historical riches. The development of high-scale policies on maritime tourism in Turkey is summarized chronologically below:

- ✓ Establishment of the Inter-ministerial Marinas Inspection Commission in 1967,
- ✓ 1968-1977 Second Five-Year Development Plan, the decision of establishing a marina chain and being operated by the Ministry of Transport,
- ✓ In the 1970s, Western European and American tourists began to come to Turkey with their yachts they rented from Greece,
- ✓ At the end of 1970s, in the Ministry of Tourism, putting marine tourism on the agenda, determination of various marina places, preparation of development plans by State Planning Organization,
- ✓ Bodrum Marina in 1976, Kusadasi Marina in 1977 and Cesme Marina in the same period came into service,
- ✓ 1973-1977 Third Five-Year Development Plan, the regulation of marina and yacht docking sites in cooperation with the Ministry of Tourism and Promotion and the Ministry of Transport,
- ✓ 1978-1983 Fourth Five Year Development Plan, development of cruise tourism, marine tourism and marina management in the Tourism Encouragement Framework Decision, adoption of a draft law to provide the development of marine tourism in 1981,
- ✓ With the Tourism Encouragement Law No. 1634 published in the Official Gazette dated 16.03.1982, the efforts to remove the formalities and legislation in front of the development of marine tourism,
- ✓ Addressing the subject with all the details with the "Regulation on the Development of Marine Tourism" published in the Official Gazette dated 04.08.1983,
- ✓ 1984-1989 VIth Five-Year Development Plan, the development of charter transport and the decision to encourage tour operators of domestic travel agencies,
- ✓ 1990-1995 VIIth Five-Year Development Plan, Estimates that the mooring facilities of 5600 would require marina investments that would be able to moor 19,000 new yachts during this period,

- ✓ 1996-2001 VIIIth Five-Year Development Plan, predicting the reorganization of the Marine Tourism Regulation,
- ✓ In 1997, making by Ministry of Culture and Tourism the "Marine Tourism Master Plan" to be prepared in order to determine the priority investment areas in terms of marine tourism, to solve the problems in this issue and to direct the sector and to completing the "Marine Tourism Physical Plan"
- ✓ 2009 Re-arrangement of Marine Tourism Regulation as Marine Tourism Regulation,
- ✓ 2010 Ministry of Transport, General Directorate of Railways, Ports and Airports Construction, the Study of Tourism Coastal Structures Master Plan,
- ✓ 2012 Chambers of Shipping, Sea Sector Report,
- ✓ 2013 The Ministry of Transport, Maritime and Communication, fact sheets on marina management in our country.

As it can be seen, relevant stakeholders have the awareness relating to the importance of marine tourism and an idea about the steps to be taken. What is important here is to create concrete programs and action plans in the interests of common interests and shared goals and constantly update them. The dynamic environment of marine tourism requires this. Hence, this study may contribute to updating and concretization actions.

Mugla Region is one of the important yacht tourism centers with its temperate climate, protected bays, geography consisting of many countries with different cultures along the coast, natural and historical riches. In this section, it was intended to evaluate the development performance of the marine tourism in the Mugla Region in the light of quantitative data but sufficient indicators could not be reached because the data on marine tourism in Turkey are extremely inadequate and incomplete and not up to date. France, Spain and Italy have 88% of the total yacht mooring capacity in the Mediterranean (Ministry of Transport, Maritime and Communications, 2013). Turkey's share is around 3%. The marinas in Mugla province have a high rate as 36% of the capacity of the marina in our country (Ministry of Culture and Tourism, 2013). Mugla Province is also in the first place with 39% share as a potential investment area followed by Izmir with 28% share and Antalya shares with 9% share. It is estimated that the docking capacity of the yacht will increase to 15,574 by 2030 (Karanci et al., 2011).

7. METHOD

Economic development, industrial space and cluster-based and strategic management and planning are a repetitive and self-contained process that requires a large group of participants (stakeholders). Participants involved in this process; consist of, on the one side, the government and its central and local institutions, on the other side, local authorities and regional economic forces (development agencies, chambers, municipalities, unions) and other relevant non-governmental organizations (Eraslan et al., 2010). For this reason, the entire study program has been prepared on the basis of the participatory approach in order to achieve the widespread of the study, to be effective, thus; to reach to tangible results by following the pionering studies (Eraslan et al., 2010; Sarvan et al., 2012; Yuzbasioglu et al., 2011).

One of the most important stages of the research is the selection of data and information collection method and tool. Since cluster-based development researches have a significant socio-economic characteristic, the behavior of people, cultural structures, namely sociological texture is very important and qualitative research techniques have to be used. As a matter of fact, human and social behaviors are examined in social science fields such as psychology, sociology, anthropology, education and economic development. It is difficult to explain these behaviors in numbers.

Measurements show us that how many people behave how. But it cannot answer the question "why". It is called qualitative research that explores the meaning of human and group behavior. Moreover, many of the existing data currently available for use in this research consist of either inadequate or inaccurate information. This situation naturally affects the analysis results of the conducted research in the negative way. In this context, data were used for this research through qualitative research techniques (developed by testing reliability and validity in the past researches).

In the qualitative research, the data obtained by these techniques are compared with each other by using multiple data collection techniques, if possible, for the most clear and detailed investigation, description and disclosure of the phenomenon or event to be investigated. The use of more than one data collection technique within a research is called as diversification. As a secondary data collection method, written (articles of

newspapers and magazines, scientific publications and books, sectoral publications, booklets and association records of civil society organizations, member lists and addresses, promotional brochures of industry and companies, related internet resources etc.) and visual documents of the players related to sub-sectors operating in the Region have been researched and examined.

8. FINDINGS

The results of the Analysis of Competitiveness Performance of Tourism Cluster and Public University Industry Cooperation (KUSI) are given in Table 1 below.

Table 1: Competitiveness Performance of Tourism Cluster and Public University Industry Cooperation

Tourism Cluster	Diamond Model						KUSI Cooperation
	Demand Conditions	Company Strategies	Factor Conditions	Related Supporting Sectors	State Support	International Competitiveness	
Traditional Tourism	Good	Weak Moderate	Good	Moderate Good	Moderate Good	Moderate	Moderate
Marine Tourism	Good	Moderate Good	Good	Weak	Weak	Moderate	Weak
Health Tourism	Moderate	Moderate	Good	Moderate	Moderate	Weak Moderate	Weak
Sport Tourism	Good	Moderate	Good	Weak	Weak	Weak Moderate	Weak
Congress Tourism	Moderate Good	Weak	Moderate Good	Weak	Weak	Weak	Weak
Gastronomy Tourism	Weak	Weak	Moderate	Weak	Weak	Weak	Weak
Belief Tourism	Weak	Weak	Good	Weak	Weak	Weak	Weak
Nature Tourism	Good	Moderate	Good	Weak	Weak	Weak	Weak

The results of the Analysis of Competitiveness Performance of Marine Tourism Cluster and Public University Industry Cooperation (KUSI) are given in Table 2 below.

Table 2: Competitiveness Performance of Marine Tourism Cluster and Public University Industry Cooperation

Tourism Cluster	Diamond Model						KUSI Cooperation
	Demand Conditions	Company Strategies	Factor Conditions	Related Supporting Sectors	State Support	International Competitiveness	
Marine Tourism	Good	Moderate	Good	Weak	Weak	Moderate Weak	Weak

The Index Variables that make up the Cluster Development Level are given in Table 3.

Table 3: The Index Variables That Make Up The Cluster Development Level

Cluster Development Variables	Index Range			Cluster Regions		
	Istanbul	Muğla	Antalya	Izmir	Aydin	
Size of Cluster	0.25	129	53	48	80	23
Rate of Local Relation	0.50	0.37	0.37	0.22	0.32	0.31

Cluster Development Ratings are in Table 4.

Table 4: Cluster Development Ratings

Cluster Development	Index Range	Cluster Region				
		Istanbul	Bodrum	Antalya	Izmir	Aydin
Relational Capital	0.25	66.95	64.79	67.02	59.20	67.13
Rate of Local Relation	0.50	36.77	36.55	22.08	32.10	30.90
Number of Business	0.25	100.00	41.09	37.21	62.02	17.83
Level of Cluster Enhancement		60.12	44.74	37.09	46.35	36.69

Marine Tourism Clustering Analysis is given in Figure 1.

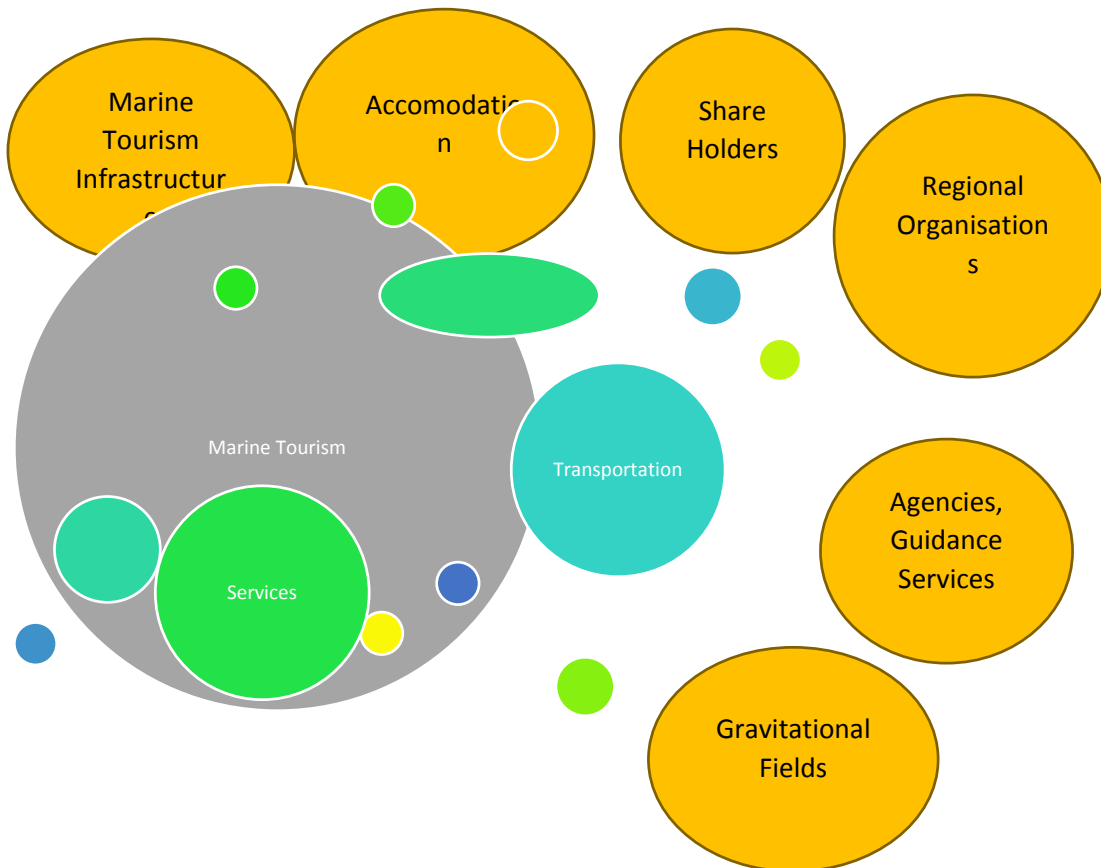


Figure 1: Marine Tourism Clustering Analysis

9. MARINE TOURISM SECTOR CLUSTERING PLAYER ANALYSIS

9.1. Service Sector (Supply Sector) Players

The high quality service offered by the harbors makes the position of marinas stronger within the Marine Tourism cluster. The type of relationship of marinas with the cluster is the provision of goods and services. The daily trip boats are important because they enable middle and lower income tourists to benefit from the marine tourism facilities with limited days and limited opportunities. Accordingly, the ports on which these vessels received services are among the important players in the marine tourism cluster. In the stated scope, port of cruise ships and boats have a strong position in the marine tourism cluster and the type of the relation with the cluster is the provision of goods and services. It is important from the point of view of the marine tourism clustering, it enhances the added value of this cluster.

The yacht manufacturing business maintains its strong position among the main players of the marine tourism clusters. Its relation with clustering is in the type of goods and services, and it has a strong relationship with clustering.

9.2. Food - Beverage Businesses

These businesses are in different forms and include different cuisines. On the other hand, the negativities experienced in service quality have not been solved yet. Food and beverage businesses are medium-sized enterprises in the marine tourism cluster. The types of relationships with the cluster are based on the provision of goods and services and the power of the relationship is in moderate level.

9.3. Travel Agencies and Tour Operators

Travel agencies and tour operators in the marine cluster are especially important in organizing and selling blue tours and daily tours. With their this aspect they fulfill the basic function of product formation. Being of

specialist travel agencies in this area also brings travel agencies and tour operators to the position of a strong player in the marine tourism cluster.

9.4. Entertainment Businesses

Entertainment businesses are one of the medium level players which are in the scope of the supply chain within the marine tourism cluster. Even if they are not one of the basic elements for the formation of the cluster, their existence are regarded as attraction factor for tourists. There are ample and varied entertainment facilities in existing ports and in the surrounding area. Relationships with the cluster are assessed within the scope of product and service provision.

9.5. Transportation and Logistical Businesses

Air transportation companies are the most prominent enterprises in terms of marine tourism clustering. The positions in the cluster vary according to the number of flights and the season.

9.6. Small Industry Sites

Small industry sites consist of small repair shops that support the relevant units at marinas in fixing, maintenance and repairing of yachts and boats. The types of relations between these sites and the marine tourism cluster are related to the provision of goods and services.

9.7. Financial Agencies

Financial agencies are strong players in the cluster because they are important elements for each player in the marine tourism cluster and they are effective in financing the clusters.

9.8. Civil Society Organizations

The industrial and commercial chambers in the region are assisting the maritime businesses in the cluster in a limited level. With this respect, they have a weak position level within the marine tourism cluster. The chambers of shipping comes at the forefront of sectoral non-governmental organizations. It contributes directly to the marine related businesses within the cluster. Therefore it is one of the players with strongest level in the cluster. The relationship with the cluster is the type of providing know-how.

9.9. Public Administration

The Ministry of Culture and Tourism is particularly effective in the establishment and audit of accommodation, travel and catering businesses along with marinas and other ports. It is in a strong player position within the health tourism cluster due to the presence of the authority to develop alternative tourism products.

Relation level of the Ministry whose relation type is regulator is high. Special Environmental Protection Board (OCK) continues to conduct its activities very effectively. Its determining role within the conservation of natural areas and the structuring process provide a strong position to this board within the cluster of marine tourism. Relationship with the cluster is regulatory type and the level of relation is strong.

9.10. Local Administrations

Local administrations cannot be at high level in the maritime tourism cluster according to the legislation. They don't have any regulatory role in marine tourism. The services they provide for the formation of the clusters and the limited control authority provide them with a mid-level player position.

9.11. Certification Institutions

When considered in the context of certification institutions, the Yacht Harbors Association, which comes in the forefront and whose headquarter is in London, controls the harbors and grades the yacht harbors in accordance with the number of anchorages. It performs an important function in terms of showing world-wide standards and qualities of yacht harbors.

9.12. Media

The relation type is goods and service, and the level of relationship with the cluster is weak.

9.13. Information Producing Institutions

Universities are in a weak position in the cluster and their relationship with the cluster are weak. A research institute for sectoral clustering does not operate.

9.14. Value Chain

When it is looked at the marine tourism sector value chain, it is seen that there are micro, meso and macro level project areas. There is an urgent need to build a structural model for the relations of the cruise and boat harbor enterprises who have a strategic position in the sector with the information producing institutions, media, certification and other transportation players. Moreover, it is understood that the level of the relationship between local governments, CSOs, food and beverage businesses is moderately weak in the development of the industry. Developing the marine tourism sector, which is very important for Turkey, as an alternative product, the necessity of developing more powerful and productive communication models with these players in the value chain are clearly seen.

10. CONCLUSION AND RECOMMENDATIONS

As a result, the marine tourism emerges as a strategic product in terms of destination. Relations in the current structure are insufficient in respect of sector growth and development strategies. In this framework, if the relations among the related stakeholders are developed, the marine tourism locomotive is needed for the future. The development of relations at the longitudinal level of the sector will allow the creation of a sustainable and developing tourism area.

Since it overlaps with the jurisdiction of many ministries, it has emerged that the inter- ministerial coordination committees should be structured. According to the legislation, while the marinas are under the responsibility of the Ministry of Tourism, the independent docking areas are under the responsibility of the Ministry of Transport, Maritime Affairs and Communications. The fact that relevant ministries are involved with different level of authorisations makes the solution difficult. It is necessary to establish a body to provide coordination between relevant ministries and institutions. Or the subject may be carried out by the Prime Ministry, but still an institution should be set up to provide coordination. An urgent coastal master plan and marine tourism strategic plan should be prepared with the participation of all stakeholders.

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