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CONCEPTUAL AND ORGANIZATIONAL-ECONOMIC JUSTIFICATION OF THE
EFFECTIVENESS CREATION OF THE CROSS-BORDER CLUSTER (Romania-Moldova) TO
PROMOTE THE DEVELOPMENT OF WINE TOURISM ROUTES

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Introduction

The study "Conceptual and Organizational-Economic Feasibility Study of a Cross-border Cluster (Romania-Moldova) for the Promotion of Wine Tourism Routes Development" aims to identify the feasibility study in order to elaborate a joint strategy for the Romanian-Moldovian cross-border cluster that would contribute to the formation and efficient development of wine tourism routes. The study presents a brief analysis of best international practices of formation and development of such clusters, mainly from the point of view of structural and functional organization. The tendencies of development of wine tourism clusters in the modern business environment are revealed. The study covers such methodological aspects as: methodological tools for creation and indicators for analyzing the effectiveness of development of wine tourism cluster. The algorithm of sequence of formation and analysis of functioning which will rationally use the revealed resource wine tourist possibilities of the region and at the same time to consider conditions and requirements of the modern market is offered. Also in the context of the research the conceptual foundations for the formation and development of a transboundary wine tourism cluster in the Central and Southern regions of the Republic of Moldova have been presented. Thus: it has been researched the existing legal framework of the Republic of Moldova in general, and of ATU Gagauzia in particular, which fosters, on legal grounds, the creation and development of the cluster in the country. A vision of the "core and framework" of wine tourism cluster that meets the real organizational, technical, infrastructural and socio-economic conditions of functioning in the region has been presented

The study applies methods of system approach - analytical-statistical, structural-logical modeling. Bibliographic and informational sources included the results of studies of domestic and foreign scientists on the analysis of cluster formation in the sphere of wine tourism



1. Analysis of foreign experience of applying the cluster model of wine tourism management

1.1. Specifics of the main wine tourism cluster regions in the world

World development and practice of tourism business in foreign countries show that clusters have the leading place in the diversity of forms of integrated structures. What is the reason for this?

- First of all, increased competition in tourism, leads to the fact that in order to maintain a high level of efficiency, sustainable economic development (income marginalization), implementation and commercialization of innovative ideas, and, accordingly, the main "players" of the industry more rational to cooperate in this form of integrated structure;
- Secondly, [17] points out the improvement of the quality of life of people in the tourism cluster;
- Thirdly, the development of the ecological component of the territory, through joining efforts, in preservation of flora and fauna, reasonable utilization of all kinds of waste, application of alternative energy sources (especially of natural character), purification and protection of water, land and air resources;
- Fourthly, it is the cluster form of integrated structure, especially in tourism, allows to fully apply, develop the accumulated business experience and strengthen, expand the specialization of the regional offer to potential and real customers of tourist services

The analysis of definitions of "tourism cluster" in scientific economic sources is mainly associated with economic and spatial agglomeration of enterprises (organizations) associated with the provision of tourist services. The characteristic features of wine tourism cluster, according to [15], are:

- the geographical proximity of enterprises (organisations), both manufacturing and non-manufacturing;
- joint participation in the provision of tourism services, production and sale of wine products;
- collaboration, cooperation at different stages of the joint process of tourism service provision;
- attracting additional funds to the region

Thus, it is the wine cluster that allows inter-sectoral interaction of voluntarily united enterprises of winegrowing and winemaking industry, tourist and recreational spheres of activity in the region, research institutions

Currently, according to experts [21], "clustering" covers 50% of the economies of developed countries of the world. The industrial sphere of Scandinavian countries is almost completely covered by clusters. In the U.S., the cluster form of business organization and management involves



more than half of the enterprises, which occupy more than 60% of the country's GDP. For example, in the European Union, by 2019 there were more than 2 thousand clusters in various sectors of activity. Clusters employ about 38% of the EU working-age population

Speaking about the classification approach of clusters in the global tourism industry, we can cite a large number of approaches. In the basis of classification of world tourist clusters marketers take into account the following segmentation features: isolated development over a long period; established specifics in the traditions of economic development; level of provision with strategically important natural resources; capacity of national markets; role of political factor in the functioning of the state

A brief factor analysis allows us to highlight the following global examples of clustering in tourism (Table 1.1.):

Table 1.1.

Examples of successful clusters in the global tourism industry

Types of tourism clusters	Country(s)/region(s) of the country
Geographical segmentation	
Cross-country (transnational) clusters	Countries of the Mediterranean and Adriatic Seas; the Caribbean; the Alpine region
Clusters within whole states	Cambodia, Scotland, Singapore
Specialized tourism clusters within the country itself	Wineries and gastronomy of France, Spain, Greece
Tourism clusters within the region	Sardinia, Catalonia
Tourism clusters of a single city	Barcelona
Tourist clusters formed around a unique tourist destination	Biosphere Reserve in São Paulo, Butterfly Valley in Rhodes)
Types of tourism activities	
Clusters formed on the basis of wine tourism	Napa Valley (California, USA)
Clusters formed on the basis of sports tourism	The Alps
Clusters formed on the basis of shopping tourism	Milan, Andorra
Clusters formed on the basis of business tourism	Luxembourg
Clusters formed on the basis of congress tourism	Rimini
Clusters formed on the basis of sport study tourism	Wales

Specificity of formation and effective functioning of such tourist factors in the world, again, based on the analysis of leading experts in the industry, indicates that they are mainly formed and operate on the principles of public-private partnership (PPP). In Western practice, "Public-Private Partnership" (PPP) is an instrument of attraction of business to perform state and municipal tasks



associated with the provision of public services, development of public infrastructure, implementation of large and complex technology development projects. The common understanding of PPP is based on the UN Millennium Declaration [34], according to which the purpose of PPP is to implement public projects: financing, construction, modernization, management, operation of infrastructure facilities and provision of social services. According to [24] there are different forms, models and mechanisms of interaction between the public and private sectors that have proved effective in practice, for example, the state promotes the development of cluster initiatives in the field by creating a platform for dialogue of cluster participants, improving the skills of the local workforce through the implementation of retraining programs, creating a region brand to attract domestic and foreign tourists, etc.

An example of an effectively operating North American tourism cluster can be the thematic cluster of wine tourism, developed in the Napa Valley (California, USA), the main wine-producing area of the country, it registers up to 5 million people annually, the total area of the cluster is 14 hectares (figure 1.1.) [24]. The tourist cluster in this territory began to develop at the turn of 1970-1980, the author of the idea is the American entrepreneur Mondavi R., he combined the last American achievements in the field of technology, management and marketing with the European art and traditions of winemaking, he changed the relations between winegrowers and wineries. The experience of the successful cooperation between winegrowers, who since the 1960s have been exchanging methods of cultivation, has played an important role in the formation of the tourism cluster. It was their consolidation that made the cluster competitive



Fig. 1.1. The typical Landscapes of Napa Valley Wine Tourism Cluster, (Northern California, USA)

1.2. Advantages of developing wine tourism in modern conditions

The benefits derived from participation in the structure of the wine tourism cluster depend on the location in the cluster and the role in the cluster. Table 1.2 shows the elements interacting with the wine tourism cluster and the benefits they receive:

Table 1.2.

Members of the participants and the benefits of their interaction in the wine tourism cluster



Participants	Advantages
State (administrative) structures of the country/region	<ol style="list-style-type: none"> 1. The number of taxpayers of the country/region increases; 2. Interaction with business is strengthened through diversification of economic development of the territory; 3. Development of the country/region is strengthened through innovation and expansion of macroeconomic trends; 4. Motivation for strategic country/regional cost planning is strengthened; 5. Social obligations to the population of the country/region are fulfilled more fully; 6. The authority of the wine tourism cluster is applied: authorities more effectively promote their initiatives with the assistance of administrative structures, initiating and implementing draft laws, programs and development strategies
Companies of the country/region	<ol style="list-style-type: none"> 1. Subsidized training and retraining programs for employees of enterprises (organizations) of the wine tourism cluster; 2. Improved market infrastructure is being created; 3. There are more opportunities for research and development of companies' products/services; 4. Costs are reduced by the joint application of similar services and suppliers by wine tourism cluster companies; 5. There are opportunities for companies to enter international markets more successfully; 6. The environment is conducive to increasing productivity and introducing innovation; 7. Knowledge sharing, cooperation between companies/organizations with complementary assets is strengthened; 8. The barrier to entry for companies to markets for products/services and supply of raw materials and labor is reduced; 9. New opportunities for companies to access financial resources are being initiated
Country/region	<ol style="list-style-type: none"> 1. Markets for local country/regional goods/services are expanded; 2. Migration from the country/region is prevented or reduced; 3. The prerequisites for the sustainable development of the region based on the rational natural and economic use of its resources of the country/region are created; 4. The infrastructure of the national/regional economy is developing: insurance, banking sector, transport, services, manufacturing, etc; 5. Innovation activity of enterprises, development of science and education in the country/region increases; 6. Development of national culture, local traditions and preservation of cultural monuments is strengthened; 7. There is an increase in local employment and budget revenues

Source: [26]



Thus, the wine tourism cluster functions as an open complex self-organizing system, the elements of which are united by material, information and financial flows. The result of integration processes arising from the interaction of cluster subsystems is the formation of synergistic effect, the essence of which lies in the establishment and development of relations between economic actors to coordinate their activities in accordance with common interests

2. Methods to develop and assess the effectiveness of the results of wine tourism cluster functioning

2.1. Tools required for the creation and development of a wine tourism cluster

Wine tourism cluster is a specific organizational and economic structure and the analysis of the effectiveness of its activities is a fundamental element in determining its position over the past period in order to work out a strategy for its further development. The research shows that general economic methods are applied when analyzing the effectiveness of wine tourism cluster activities (Figure 2.1.):

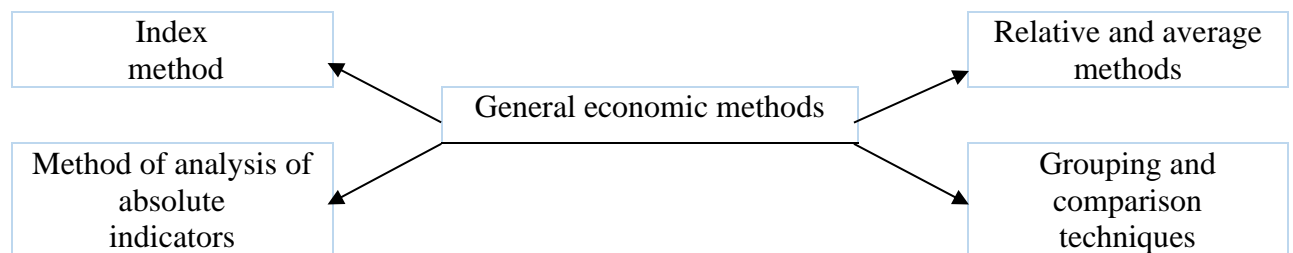


Fig. 2.1. General economic methods of analysis of wine tourism cluster performance

The practice of wine tourism clusters shows that both quantitative and qualitative methods of analysis are adaptive in the process of study and analysis of their activities. Most scientists consider it appropriate to assess the cluster system through the level of consumer service, defining a set of criteria indicators [25; 16]. Cluster development can be determined through the calculation of economic, scientific and technical indicators and the calculation of the economic effect of the innovations invested (Table 2.1.):

Table 2.1.

Indicators used to assess the effectiveness of wine tourism cluster functioning



Direction of analysis	Key indicators
Analysis of economic efficiency of operations	<ul style="list-style-type: none"> ● Gross sales of products/services; ● Gross profit: from infrastructure improvement; from introduction of inventions, patents, know-how; from licensing activities; from joint promotion of tourist products; ● Profitability of sales of products/services; ● Capacity utilization and utilization rate; ● Volume of attracted investment funds; ● The payback period of the investment; ● Capital construction period; ● Labor Productivity; ● Productivity; ● Turnover of current assets, etc.
Analysis of human resources policies	<ul style="list-style-type: none"> ● Income of cluster employees/workers; ● Job growth; ● The level of continuous training and professional development of participants; ● The level of organization of working conditions, etc.
Analysis of the level of innovative development	<ul style="list-style-type: none"> ● Number of new products/services; ● Costs of innovation; ● Number of products/services improved; ● Number of investments in modernization and creation of new technologies; ● Number of joint scientific research in the wine tourism cluster, etc.
Analysis of the level of scientific and technological development	<ul style="list-style-type: none"> ● Specific weight of modernized information and communication technologies; ● Specific weight of modernized technological processes; ● Product/service automation coefficient; ● The level of organization of production and labor; ● The level of competitiveness of companies - members of the wine tourism cluster and their tourist products in the markets with high solvent demand of the population, etc.
Level of development of the core of the wine tourism cluster	<ul style="list-style-type: none"> ● The level of development of the core of the wine tourism cluster; ● Level of education of employees/workers; ● Level of certified products/services; ● Level of core uniqueness (number of exclusive authentic services, products, facilities)
The uniqueness of the wine tourism cluster	<ul style="list-style-type: none"> ● Level of development of wine tourism cluster components; ● Number of enterprises belonging to the wine tourism cluster; ● Number of joint projects; ● Number of joint tourism events/activities; ● Growth of new companies in the wine tourism cluster over a certain period of time; ● Number of projects completed over time; ● Number of new projects, etc.

The conceptual justification of the importance of wine tourism cluster performance analysis methods as a basis for the development of the subject under study is supported by a number of prominent scientists in their works (table 2.2.):

Table 2.2.

Studies in the context of analyzing the effectiveness of wine tourism cluster functioning



Author(s)/ bibliographic source	Fundamental conclusions
<p>Pike S. / [Pike S. Destination image analysis: A review of 142 papers from 1973 to 2000 // <i>Tourism Management</i>. - - 2002, № 23(5). - - P. 541–549.]</p>	<p>The scientist investigated in detail the content and conclusions of the research presented in the articles considering the concepts "Evaluation of tourism clusters", "Cluster efficiency in tourism", "Cluster theory", "Cluster in tourism", "Tourism development", "Competitive advantage and cluster evaluation". The validity of the use of literature review of scientific articles. It indicates that the analysis of articles contributes to the development of tourism in the design of various strategies or directions of development of tourist destinations</p>
<p>Claveria O. and Datzira J. [Claveria O., Datzira J. Forecasting tourism demand using consumer expectations // <i>Tourism Review</i>. - - 2010, № 65(1). - - P. 18–36.]</p>	<p>According to the authors, the demand for wine tourism cluster is preferably measured not only by the number of visits, but also by the number of days of accommodation, as, in their opinion, these indicators are related to internal profitability and sustainability of wine tourism regional cluster development.</p>
<p>Mercer C., and Celine S./ [Mercer C., <i>Urban and Regional Quality of Life Indicators</i>. - Brisbane: Institute of Cultural Policy Studies, Griffith University. 1994, - 245 p.; Selin S. Developing a typology of sustainable tourism partnerships // <i>Journal of Sustainable Tourism</i>. - - 1999, № 7(3). - - P. 260–273.]</p>	<p>One of the acute problems of modern tourism is the difficulty of collecting baseline information and the lack of calculated indicators of economic efficiency in tourism</p>
<p>Wong K.N., Tang T.C. [Wong K.N., Tang T.C. Tourism and openness to trade in Singapore: Evidence using aggregate and country-level data // <i>Tourism Economics</i>. - - 2010, № 16(4). - - P. 965–980.]</p>	<p>The link between tourism cluster and investment, trade turnover, interest rates in the region where the cluster is located is highlighted</p>
<p>Rudchenko N./ [https://cyberleninka.ru/article/n/klastery-v-turizme-osobennosti-klassifikatsii-protsess-formirovaniya-i-metody-otsenki]</p>	<p>Firstly, the obtained results of wine tourism cluster performance evaluation should be compared with the annual research data and ranked by tourism markets, if possible. Secondly, the data of inbound and outbound tourism of wine tourism cluster should be taken into account. Third, seasonality should be calculated and taken into account. Fourthly, tourism resources have specific characteristics which should be taken into account in the analysis of wine tourism cluster</p>

It is the tourism resources that are decisive in defining the characteristics of the cluster and constitute its constituent elements. It is the uniqueness of tourism resources and local traditions of the Republic of Moldova that influence the choice of specificity of the wine tourism cluster. Therefore, in addition to the indicators presented above, the following indicators should be calculated for a productive analysis of wine tourism cluster functioning efficiency:

- dynamics and structure of tourist flow;
- The average number of days a tourist stays in the territory;

- Income received by tourism enterprises per one tourist;
- the number of employees employed in the tourism sector;
- a repeat visit to the cluster;
- appearance of new attractions in the wine tourism cluster

2.2. Algorithm of creation and assessment of efficiency of wine tourism cluster functioning

Modern studies are aimed at arguing the fact that the analysis of the formation and development of wine tourism cluster activity and the calculation of the above indicators should be built according to a certain algorithm, which appears as follows (figure 2.2.) [27]:

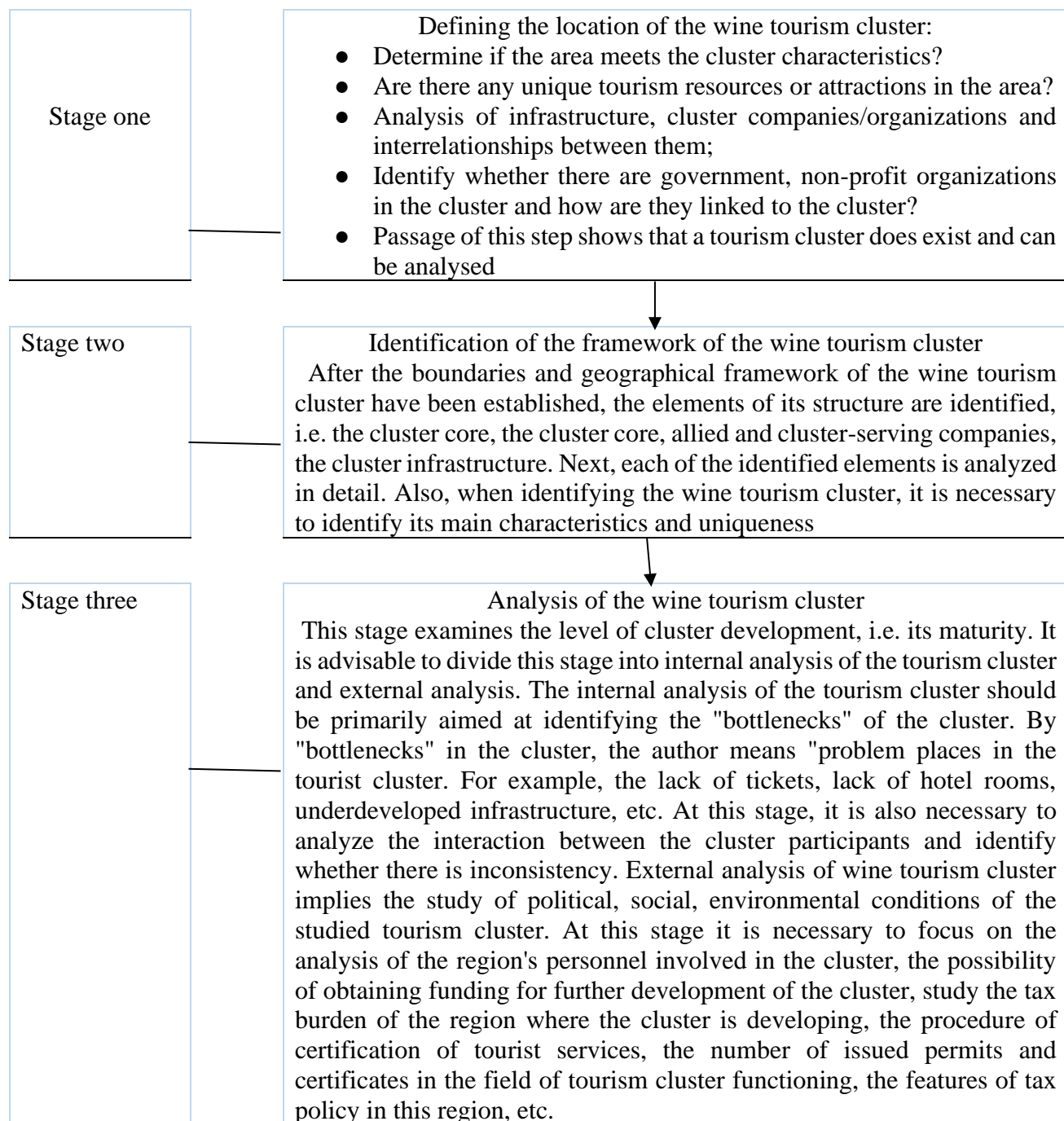


Fig. 2.2. Algorithm of the sequence of formation and development of wine tourism cluster activities

The presented algorithm of tourism wine cluster analysis is impossible to implement without a full-fledged (detailed and versatile) information base

3. Formation of the cross-border wine tourism cluster in the Republic of Moldova and the border area of Romania

3.1. Study of the current institutional and regulatory framework for the formation and development of wine tourism cluster in the Republic of Moldova

In the Republic of Moldova, tourism is a branch of the national economy with complex functions, including assets and services provided for consumption to persons traveling outside their usual environment for less than one year with a purpose other than to perform a paid activity in the place visited [1]. The most important condition of tourism development in the country space is its institutional and normative-legal support. Currently the touristic activity is primarily regulated by the Law of the Republic of Moldova "About Tourism" [2]. In ATU Gagauzia there is no such law of the People's Assembly of ATU Gagauzia, which would regulate the development of tourism at the regional level. The basics of regulation of the tourist activity in Moldova are stipulated by the following program documents: National Strategy for tourism development in the Republic of Moldova: Tourism 2020; Strategy for regional development of the Republic of Moldova (2016-2020); Strategy for regional development of ATU Gagauzia (2017-2020); Strategy for socio-economic development of ATU Gagauzia (2017 - 2022). An important step in the development of tourism industry in the region of ATU Gagauzia was the fact that in accordance with item 2, article 11 and article 12 of the Law of the Republic of Moldova № 438 "On the regional development in the Republic of Moldova" from December 28, 2006, the Regional Development Agency of ATU Gagauzia has decided to take as a basis and be guided by the Regional Program "Enhancing of the tourism attractiveness of the ATU Gagauzia 2019-2025" for attracting donor funds for implementing the concept-projects on tourism and the prepared measures. The Ministry of Economy of the Republic of Moldova has elaborated and submitted the National Program of Tourism Development for 2021-2025, as well as the Action Plan for its implementation. The document was elaborated in relation to the completion of the Tourism Development Strategy "Tourism - 2020" implementation period and is harmonized with the objectives of the "Moldova - 2030" program. With the support of the United States Agency for International Development in the Republic of Moldova (USAID), in collaboration with the Government of Sweden, with the Government of the United Kingdom, a Strategic Tourism Development Program for the years 2020-2030 "Tourism-2030 Program" has been developed and is actively implemented

The institutional framework for the management of the tourism sector in the country in 2021 is not represented by a state-level agency. In the Republic of Moldova there is a Public Association "Asociația Națională pentru Turism Receptor a Republicii Moldova" (ANTRIM) [28], one of the main functions of which is to promote Moldova as a tourist destination in the international market. In ATU Gagauzia the coordination of tourism development is carried out under the aegis of the General Directorate of Economic Development and Tourism of Gagauzia [36], within the Department of Tourism Development and Promotion. National Bureau of Grapes and Wines (NBGW) was



formed as part of the public-private partnership for implementing policies in the wine industry [32], with one of its strategic development directions being the promotion of the image of wine products in the domestic and export markets, including wine tourism. Along with this, in ATU Gagauzia functions a public organization Association of wine producers from ATU Gagauzia "Gagauzia-Vin", which promotes (among others) the brand Gagauz Mallari and a favorable image of wine tourism in the region

3.2. Defining the potential and boundaries of wine tourism cluster location in the Republic of Moldova

The Republic of Moldova is a small but very beautiful country, with a population of less than 3 million people, located between Romania and Ukraine. The capital of the Republic of Moldova is Chisinau, the local language is Romanian (according to the Constitution of the Republic of Moldova at the end of 2021 - Moldovan language), Russian is widely used. The ATU Gagauzia (Gagauz Yeri) is situated in the southern region of the country. According to the responses of tourists, the country has hospitable people and delicious traditional (national dishes) cuisine. According to [19] the Republic of Moldova is an ideal destination for travelers of all types, and wine tourism is a strong point of the country. A number of studies have been published, confirmed and substantiated by substantiated claims [18], that a country as small in territorial scale but huge in opportunities as Moldova has an undeniable tourism potential. Certainly, it is worth mentioning that the forced pandemic situation (caused by a new kind of virus COVID-19), led to a decline in inbound tourism worldwide. However, the right measures of state regulation of this industry development will "straighten out" the statistical indicators determining the effective development. It is important to state that the current tourism industry in the Republic of Moldova is a "Start-up" industry compared to international tourism in many other countries around the world. Thus, the practice of rational and effective management has shown (effective tourism marketing strategy and action plan written [18]) that in just 2 years (2016-2018) the Republic of Moldova has transformed from "the least visited destination in Europe" into a "must-visit country" [33]. Bloomberg.com named the country as one of the 10 fastest-growing tourist destinations in Europe [13] [Internet access: These Are the Fastest-Growing Destinations in Europe. <https://www.bloomberg.com/news/articles/2018-09-24/these-are-the-fastest-growing-destinations-in-europe>]

After a steady decline in inbound tourism in recent decades, Moldova's undervalued tourism industry is now seeing vital signs of growth. So in 2017, 145,000 tourists visited Moldova, an increase of 19.6% compared to 2016 and 54% compared to 2015 [18]. The growth continued in 2018. Thus, according to the National Bureau of Statistics of the Republic of Moldova [35], travel agencies and tour operators provided tourism services to 376,600 tourists in 2019, an increase of 16.4% (+ 61763



tourists) compared to 2018. The increase in the number of tourists was due to an increase in outbound tourism (+ 17.6%), domestic tourism (+ 14.9%), as well as host tourism (+ 3.0%). Tourists came to the Republic of Moldova in 2019 (Figure 3.1.) from Romania (17.4%), Austria (13.2%), Germany (8.0%), Russian Federation (7, 0%), Ukraine (6.6%), Poland (5.0%), UK (4.8%), China (4.2%), Italy (2,9%), USA (2.5%), Netherlands (2.3%), Japan (2.2%), Turkey (1.8%), Sweden (1.5%), Finland (1.4%), Israel and France (1.2% each), Switzerland and Czech Republic (1.1%) and Lithuania (1.0%):

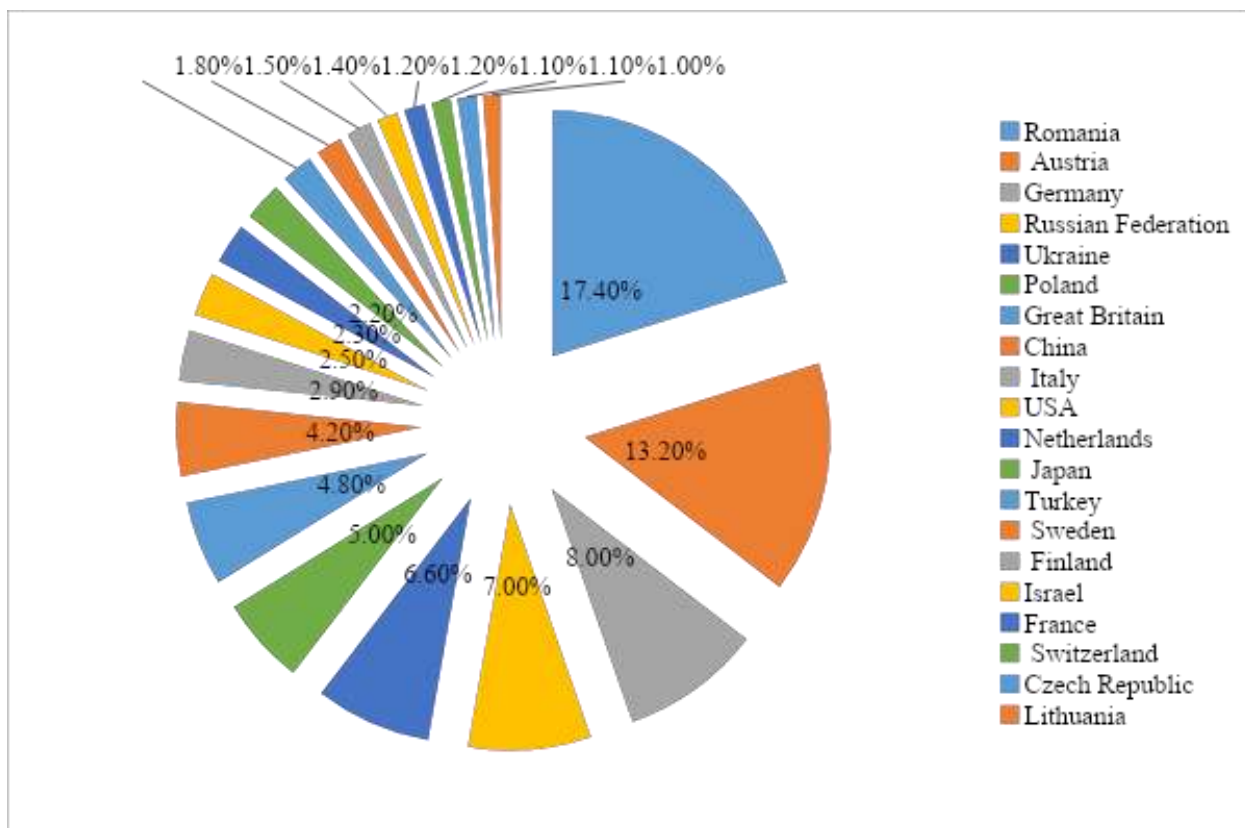


Fig. 3.1. Structure of tourist arrivals in the Republic of Moldova (by country) in 2019, %

In 2020 (due to epidemiological situation COVID-19) travel agencies and tour operators provided tourism services to only 124.5 thousand tourists, which is 33.1% compared to 2019 (see Figure 3.2). Thus, the number of tourists in 2020 compared to 2019 decreased by 252.1 thousand visitors due to a decrease of 235.9 thousand visitors (-76.0%), 12.9 thousand visitors (-65.0%) for "outbound" tourism, and 3.3 thousand visitors for "inbound" tourism. In 2020, approximately 7 thousand foreign tourists and travelers who visited the Republic of Moldova used the services of travel agencies and tour operators

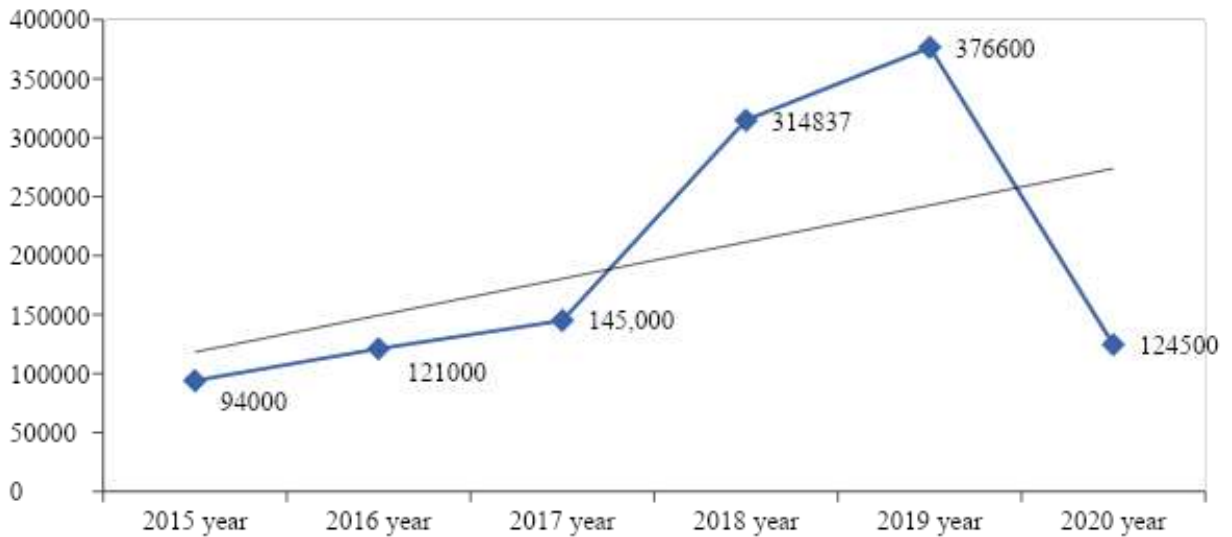


Fig. 3.2. Evolution of the number of tourists in the Republic of Moldova over the period 2015-2020, (thousand people)

Inbound tourism in the Republic of Moldova is positioned as a "niche tourism product" with an "emphasis" on wine, gastronomy, rural tourism and "non-extreme 'soft" adventure tourism. However, the results of the survey of foreign tourists show that wine tourism prevails: 60% of foreign tourists claim to value wine and food in the Republic of Moldova the most [19]

Winegrowing and winemaking on the territory of Moldova originated 4000 to 5000 years ago, when the "Dacians" learned how to make wine from grapes. Winemaking developed when Greek settlers who arrived on the Black Sea coast towards the end of the 3rd century B.C. brought with them their winemaking traditions and shared them with the local population. The first records on wine date back to 7000 B.C. Wine was used as a medium of exchange for other goods/products and as a trophy reward after hostilities. These facts elevated wine to the level of a national product of the Republic of Moldova

In 2020, despite the COVID-19 pandemic, wine exports declined by only 12% in volume and 7% in value (Figure 3.3) [35]:

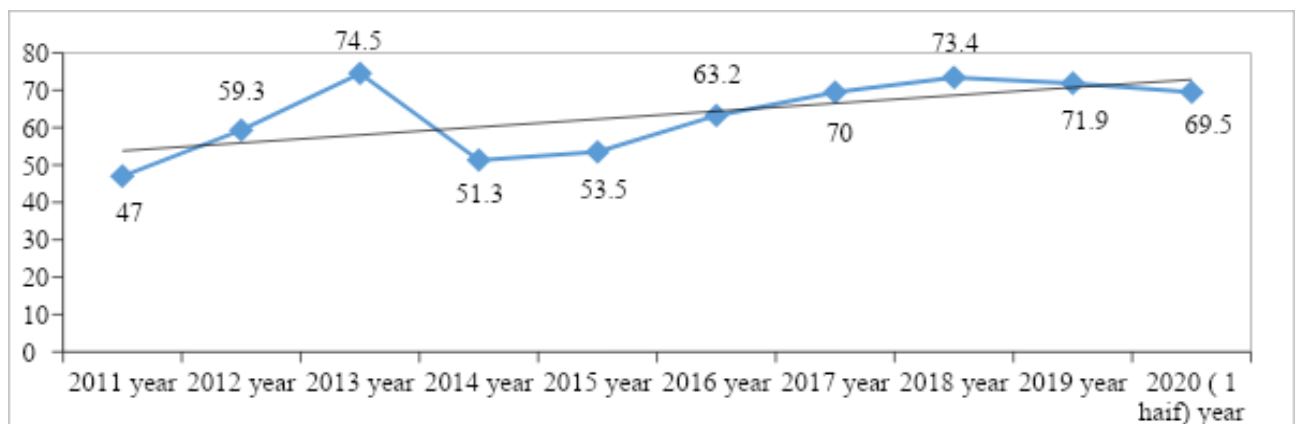


Fig. 3.3. Dynamics of exports of bottled wines of the Republic of Moldova for the period 2011-2020. (mln. litres)

The Republic of Moldova continues to actively export wine products to 63 countries (both "East" and "West") (Figure 3.4.) [35]:

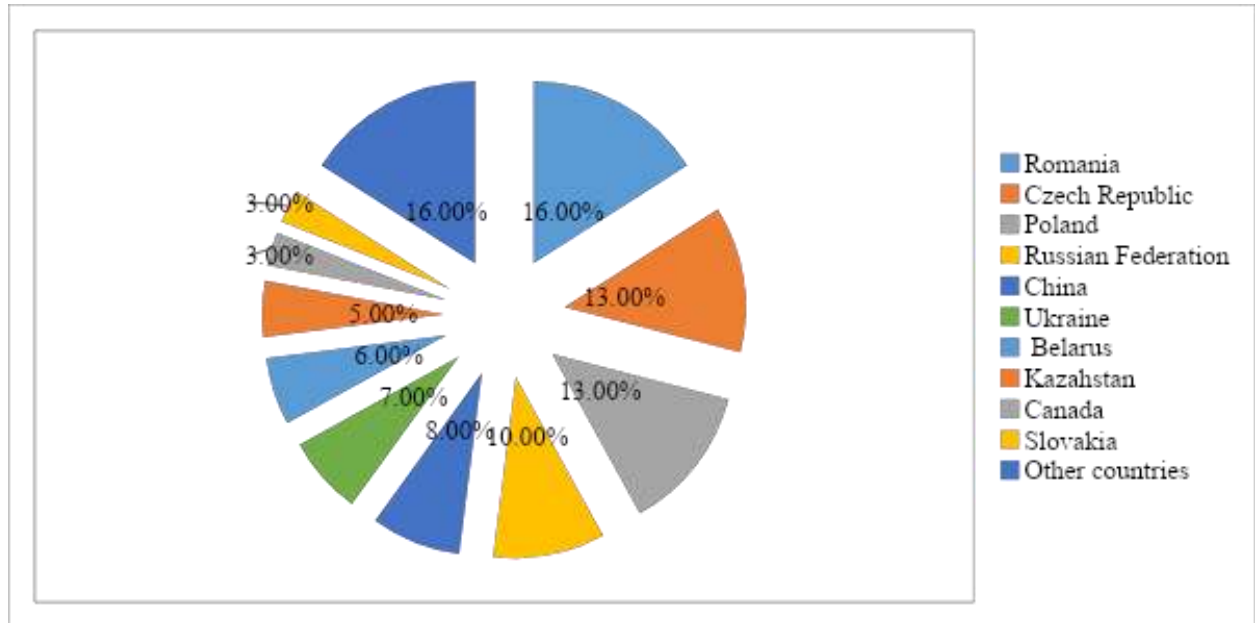


Fig. 3.4. Structure of geography of export of bottled wines of the Republic of Moldova in 2020 (January-June), %

Quiet wines generated 80.2% of total revenues in the Republic of Moldova in 2020, divines and distillates 14.5%, fortified wines 3.3% and sparkling wines approximately 2%

Noteworthy are the results obtained by wine companies in the Republic of Moldova in 2020 at international competitions organized by ONVV (National Office of Vine and Wine of the Republic of Moldova) and funded by FVV (Wine and Wine Foundation of the Republic of Moldova), namely registration of a record number of awards: more than 950 medals, which exceed the success of 2019. The arsenal of planting material in the country provided the following structure of vineyard varieties composition (Figure 3.5.) [22]:

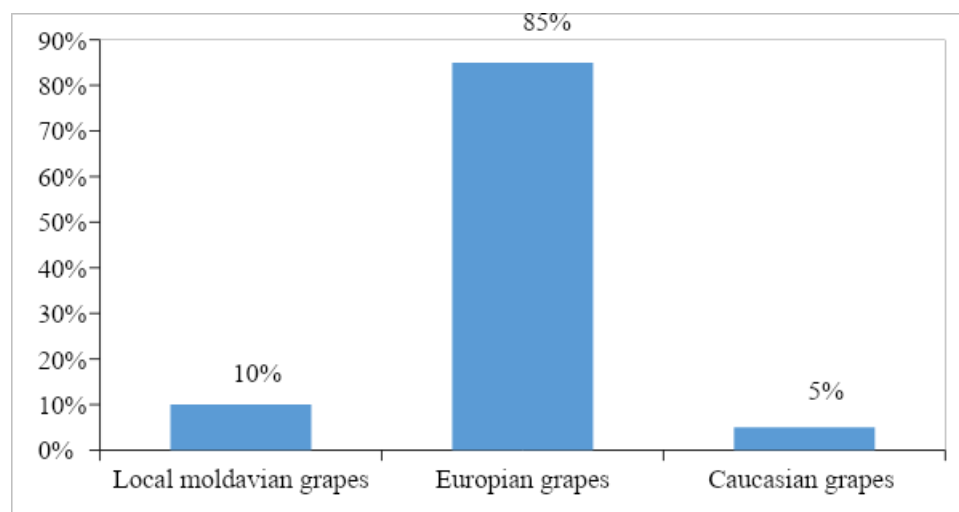


Fig. 3.5. Structure of grape variety origin in the Republic of Moldova.

The analysis of the structural composition presented in Figure 3.5. indicates the cultivation, almost overwhelmingly (85%), of European grape varieties, which allows the production of wine familiar in taste to European tourists, but with the "Moldova's flavor", which makes it unique. Moreover, according to the annual report of the International Organization of Vine and Wine [29], the Republic of Moldova ranks 19th globally in terms of wine production among wine producing countries (Table 3.1; Figure 3.6.):

Table 3.1.

Grape wine production (excluding juices and musts) at global level for 2019-2020

(unit: mhl)

Name of Country	Year						2020 year/2019 year Var. in volum (+;-) (mhl)	2020 year/2019 year Var. in %
	2015	2016	2017	2018	Prov.2019	Prel.2020		
Italy	50,0	50,9	42,5	54,8	47,5	47,2	-0,3	-1 %
France	47,0	45,4	36,4	49,2	42,1	43,9	+1,8	+4%
Spain	37,7	39,7	32,5	44,9	33,7	37,5	+3,8	+11 %
USA	21,7	23,7	23,3	24,8	24,3	24,7	+0,3	+ 1,0 %
Argentina	13,4	9,4	11,8	14,5	13,0	10,8	-2,2	-17%
China	13,3	13,2	11,6	9,3	8,3	N/A	N/A	N/A
Chile	12,9	10,1	9,5	12,9	11,9	10,3	-1,6	-13 %
Australia	11,9	13,1	13,7	12,7	12,0	10,6	-1,3	-11%
South Africa	11,2	10,5	10,8	9,5	9,7	10,4	+0,7	+7 %

Germany	8,8	9,0	7,5	10,3	8,2	8,9	+0,7	+ 11 %
Portugal	7,0	6,0	6,7	6,1	6,5	6,5	0,0	0%
Russia	5,6	5,2	4,5	4,3	4,6	4,7	+ 0,1	+ 2 %
Romania	3,6	3,3	4,3	5,1	3,8	3,6	-0,3	-7 %
Brazil	2,7	1,3	3,6	3,1	2,2	2,2	0,0	0 %
Hungary	2,6	2,5	2,5	3,6	2,4	2,9	+0,5	+22 %
Greece	2,5	2,5	2,6	2,2	2,0	2,0	0,0	-2 %
Austria	2,3	2,0	2,5	2,8	2,5	2,7	+0,2	+10 %
New-Zealand	2,3	3,1	2,9	3,0	3,0	3,3	+0,3	+11%
Moldova	1,6	1,5	1,8	1,9	1,5	1,2	- 0,3	-18,0 %
Bulgaria	1,4	1,2	1,2	1,1	0,9	0,9	- 0,1	-7,0 %
Georgia	1,2	0,9	1,0	1,7	1,8	1,7	- 0,1	- 3 %
Croatia	1,0	0,8	0,7	1,0	0,7	0,7	0,0	-7,0 %

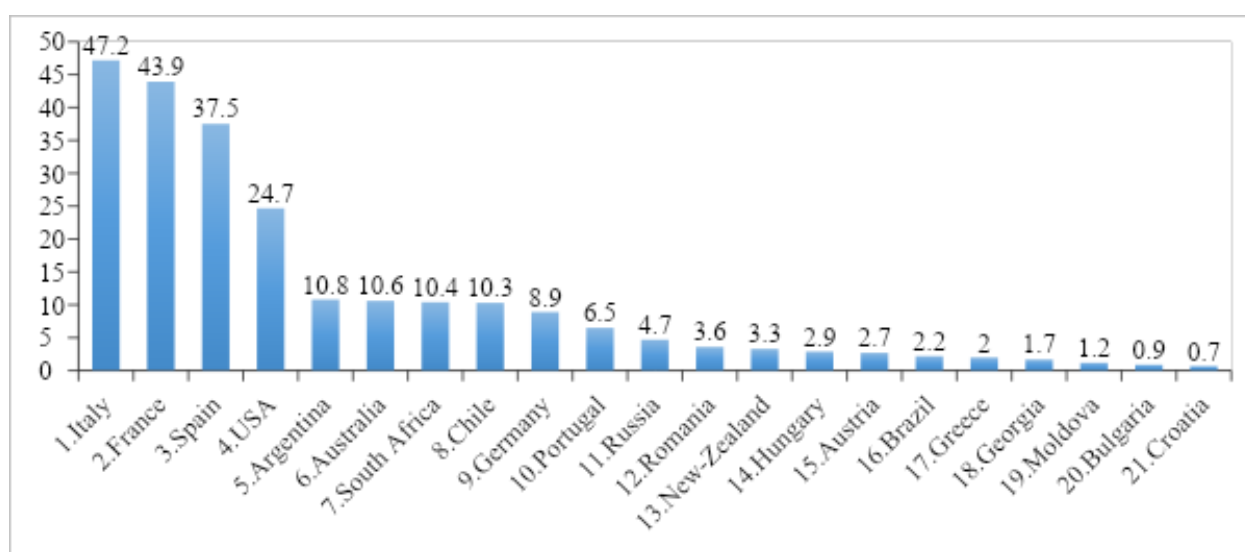


Fig. 3.6. The world ranking of wine producing countries (as of 2020), (unit: mhl)

In 2020, in the Republic of Moldova the grape harvest decreased by 39, 2 % and the amount of wine produced by 42, 2%. At the same time, thanks to the promoted policy, active involvement of its participants and a consistent strategy in this area, the industry retains its competitive potential for further development [37]. Despite pessimistic forecasts, according to statistical data, in 2020 the export of wine products of the Republic of Moldova decreased by 18% in volume and by 7 % in value. In contrast, exports of bottled wines increased by 9 % overall, with growth in most exporting countries. Nevertheless, the red wines produced from the 2020 harvest are of the highest quality with a high maturity potential

The "Tourism 2030 Program" of the Republic of Moldova, is focused on investing in sustainable development of rural areas, as the country is experiencing a high level of depopulation, due to the exodus of indigenous people from rural areas to urban areas and mass migration abroad. According to experts in the field of tourism, by attracting foreign tourists, small and medium-sized family businesses are motivated to retain and open more jobs [18]. In the framework of the project "Moldova Competitiveness", funded under the USAID fund, as well as funded by the Government of Sweden, a tourism development program "Go-Regional" was developed and implemented, which aims to stimulate the development and strengthening of activities of producers of tourist services, tourist facilities, cultural tourist events, tourist routes, as well as management capabilities of local tourist "destinations". Thus, according to the priorities of the program, it is important to increase the capacity of producers of tourist services to attract and support tourists for longer periods of time (at least up to 3 days of stay), the ability to generate and increase the growth rate of the number of jobs

3.3. Identification of the structural components of wine tourism cluster in the Republic of Moldova.

A review of the business literature on wine routes, a study of the results of academic publications, creates a clear picture of the global concept of wine tourism and the presence of great potential in the implementation of wine routes in the Republic of Moldova. Below are some key facts (for 2019-2020), stating the state of viticulture and winemaking industry in the Republic of Moldova (including Gagauzia):

- 1) Over 200 small and medium scale winemaking companies, registered in the National Registry of Grapes and Wines of the Republic of Moldova (including 16 companies registered in the State Registration Chamber of Gagauzia (see Table 3.2));
- 2) 15% of the active population in the Republic of Moldova is involved in wine production;
- 3) the number of wineries hosting tourists in the Republic of Moldova has increased from 9 in 2015 to 23 in 2019 (including 4 wineries in Gagauzia (see Table 3.2.));
- 4) More than 80% of all wine production of the Republic of Moldova is exported, which is \$129 or 5% of the country's exports;
- 5) The Republic of Moldova has over 128,000 hectares of land under vine plantations, which is one of the highest densities of vine plantations to the surface area of the country in the world (ranking 6th among European wine-producing countries by size of vine plantations);
- 6) 3 historic wine regions with Protected Geographical Indication (PGI) status for wine recognized by the EU have been formed in the Republic of Moldova: Codru, Stefan Voda, Valul lui Traian;

- 7) In 2013, the National Office for Vine and Wine (NOVW) was opened as the main body that manages the Moldova's wine sector;
- 8) Moldova's wines (at the end of 2020) are sold in 63 countries, mostly in highly developed EU markets, showing steady growth over the last 5 years;
- 9) The first wines with Protected Geographical Indication (PGI) status recognized in the EU were released as early as 2016;
- 10) 13% of Moldova's wines (of the total volume produced) are certified with the Protected Geographical Indication (PGI) status, and are recognized in EU countries;
- 11) 2014 has already seen significant progress in the international recognition of the quality of wines produced in the Republic of Moldova: more than 1000 awards at international competitions/exhibitions;
- 12) Today more than 30 varieties of technical grapes are cultivated in the Republic of Moldova: 85% European grape varieties; 10% Black Sea grape varieties; 5% local varieties;
- 13) White wines in the Republic of Moldova account for 60% of production from the following varieties: Chardonnay, Sauvignon Blanc, Muscat Ottonel, Aligote, Pinot Gris / Blanc, Feteasca White / Regala. Red wines (40% of production) are produced from Merlot, Cabernet Sauvignon / Franc, Pinot Noir, Rara Nyagre, Fetska Nyagre, Saperavi;
- 14) In 2020, the bottled wine market grew by 5% in volume terms and by 0.2% in value terms (as of the first half of the year);
- 15) In 2020, the National Office for Vine and Wine (NOVW) released the first Wine Tourism Guidebook "ReVin cu drag", dedicated to wine tourism opportunities in the country;
- 16) In 2020, the Virtual Moldova Platform created the first virtual map of wineries in the Republic of Moldova.

Table 3.2.

Vine-growing and wine-making enterprises of Gagauzia (Republic of Moldova), (on the end of 2020)

No. n/a	Company name	Enterprise category by scale	Availability of facilities to receive tourists
1	IM "Tecca" SRL	Small-sized	-
2	"Tartcomvin" SRL	Small-sized	Wine cellar, guided tours of the plant and production workshops
3	SRL "Nexovin"	Small-sized	-
4	SRL "Jemciujina"	Small-sized	-
5	SA "Aurnecvin"	Small-sized	-

6	"Vinuri de Comrat" SA	Medium -sized	Tasting room-restaurant, wine cellar, wine collection, wine shop, museum of Soviet times, tourist area for rest and tasting of national dishes, demonstration site of a grape plantation, retro music show, events
7	SC "Tomai-Vinex "SA	Medium -sized	Tasting room (under repair), wine cellar, guided tours around the plant and production workshops, wine tastings, wine shop
8	SA "Kazaiak-Vin"	Medium -sized	Wine cellar, wine collections, guided tours of the factory and production halls, wine tasting, wine shop, restaurant
9	"Invinprom" SRL	Medium -sized	Wine cellar, guided tours of the plant and production workshops
10	SA "Ciok-Maidan-Vin"	Medium -sized	-
11	"Şadrisvin" SRL	Medium -sized	-
12	SRL "Moldiug Vin"	Medium -sized	-
13	"ArcVinCo" SA	Medium -sized	-
14	"DK-Intertrade" SRL	Large-sized	Wine cellar, guided tours of the plant and production workshops
15	IM "Vinaria Bostavan" SRL	Large-sized	-
16	"CGL-PRIM" SRL	Home winery	Tasting room-restaurant, wine cellar, museum of Gagauz life, donkey-drawn cart, master classes, tourist area for rest and tasting of national dishes (restaurant), demonstration site of the vine plantation, demonstration production workshop, hotel (under construction)
17	SRL Winetage	Home winery	Wine tasting
18	"Negvin-Prod SRL	Not operational since 2013	
19	"Burlacu-Vin" SA	Not operational since 2009	

Out of 17 wineries, 14 are members of "Gagauzia-Vin" Association. However, currently only 2 enterprises are included in the national "Wine Route" and receive a large number of tourists: "Vinuri

de Comrat" SA (mun. Comrat), "CGL-PRIM" SRL ("Kara Gani") (Vulcanesti). In 2018 an ethno-cultural complex "Gagauz Sofrasi" (Congaz village, Comrat district) was opened, which has a wine store (collection, vintage, table and house wines)

In 2018, the Wine Tourism Accelerator Programme came into effect in the Republic of Moldova to support the development of new wineries, wine and food festivals and the installation of tourist signage in key wine regions. According to the latest figures, the country opened its first certified Sommelier School in 2013, in 2018 15 new wine service professionals in the Republic of Moldova were accredited with the European Sommelier Certificate and more than 20 food selection education events were held in local restaurants. Nevertheless, there is still a need for additional training at hospitality sites related to wine tourism

The existence and further development of wine tourism potential in the Republic of Moldova clearly defines the fact that its clustering with the involvement of all stakeholders, and bringing its functioning to new frontiers, opens up great horizons for expanding the national market borders, recognition at the international tourism market level and increasing the pace of quality tourism services

At present Gagauzia has approved an event tourism plan (2020), which includes important cultural events in the region, aimed at maintaining and developing the culture life of the Gagauzian people (three of them are included in the national calendar of festivals of the Republic of Moldova):

- National holiday "Hederlez" (held annually on May 6 at the horse farm "At-Prolin", Ceadir-Lunga municipality);
- Regional National Costume Festival "Gagauz Gergefi" (held annually in Vulcanesti municipality);
- Regional Carpet Festival "Gagauz kilimneri" (held annually in Haidary village, Ciadir-Lunga district);
- Wine Festival "Gagauz Sarap Yortusu" (held annually in Comrat municipality).

Also popular with tourists are the following festivals: the International Ethno-competition "Budjak sesleri" (Avdarma village, Ciadir-Lunga district); the gastronomic festival "Baur" (Kopcak village, Ciadir-Lunga district).

In Gagauzia 144 enterprises operating in the field of public catering: Comrat district: 83 enterprises (40 enterprises are located in Comrat municipality); Ceadir-Lunga district: 43 enterprises (23 enterprises are located in Ceadir-Lunga municipality); Vulcanesti district: 18 enterprises (17 enterprises are located in Vulcanesti town).

The level of provision of hotel rooms per 1000 residents in ATU Gagauzia corresponds to the average European level by 15,5% [10]. In case of large-scale events (exhibitions, forums, festivals) it is not



possible to accommodate a large number of tourists. According to the statistical data of the General Directorate of Economic Development and Tourism of Gagauzia, at the end of 2020 there were 14 hotels, hostels and agritourist pensions with 112 rooms and 236 beds

There are 4 tourism companies in ATU: 1 international TEZ TOUR (Comrat municipality), 3 national companies: SRL "San Air Service" (Vulcanesti, Comrat municipality, Copceak village); SRL "Damla Tur" (Comrat, Ceadir-Lunga); "Valcan Tur" SRL (Comrat municipality and Vulcanesti town)

According to the data of the General Directorate of Culture of Gagauzia, there are 137 registered monuments in the autonomy, which are divided into 5 categories: archeological, architectural, historical, built in public places military burials and military memorial objects. There is also an Art Gallery of Gagauzia and 13 museums, 7 of which are registered in the National Registry of museums of the RM: the Regional Museum of History and Local Lore of Comrat municipality and the National Museum of Gagauzia. Comrat, the National Gagauz Historical and Ethnographic Museum named. D. Kara Cioban (Besalma village), historical and ethnographic museums (mun. Ceadir-Lunga, v. Etulia (Vulcanesti district), Avdarma village (Comrat district), Vulcanesti town,. Cismichioi). There are local museums in operation: museum named after I. Bassa (village of Chirsovo, district of Comrat), the Center for carpet weaving and the Museum of Local lore in village of Gaidari, and the Historical and Ethnographic Museum in Cazaclia village. Cazaclia; private museums - "Apa Boba Evi" House-Museum (Kirsovo village, Comrat district); Museum of Bulgarian Traditions "Rodoliubets" (Kirsovo village, Comrat district), Ethno-cultural Complex Gagauz Sofrasi (Kongaz village, Comrat district). In total, there are more than 90 thousand museum exhibits

The Republic of Moldova has an International Airport (mun. Chisinau) placed 100 km away from the mun. Comrat. In Gagauzia the automobile transportation in the tourism sector (tourist transfers) prevails. In Gagauzia the biggest part of the vehicle fleet exceeds 8 years of exploitation and there is no equipment of the buses with tachographs, and the number of seats is more than 9 people. In the region there are taxi services covering the whole territory of the region (however only 4 settlements from 26 are represented by taxi providers). There is no water and air transportation in Gagauzia, only one direction in the region (but with long delays). There is no authorized car and bicycle rental service in Gagauzia [10]

All 26 settlements in Gagauzia have medical institutions for providing first aid. There are branches of the main commercial banks from the Republic of Moldova represented in the region, and there is an access to exchange offices of foreign currencies to the national currency

Also in Gagauzia, by the end of 2020, three providers of telecommunications, Internet and mobile telephony services will function efficiently



3.4. Internal and external analysis of the wine tourism cluster in the Republic of Moldova

The analysis of the condition and trends in the wine tourism industry reveals the main strengths and weaknesses, opportunities and threats to the development of this activity in the Republic of Moldova (Figure 3.7):

Strengths	Weaknesses
<ul style="list-style-type: none"> ● 5000 years of winemaking history and cultural heritage; ● Quality wines and delicious national dishes; ● A variety of wine festivals and events; ● Unique landmarks, including those listed in the Guinness Book of World Records; ● High level of development of winegrowing and winemaking industry as the basis for wine tourism; ● Three grape zones with a Protected Geographical Indication (PGI); ● Rich and diverse natural environment; ● Local produce, opportunity to visit local producers, farms and gardens; ● Investing in a "Start-up" business 	<ul style="list-style-type: none"> ● Stage of development of wine tourism industry "Start-up"; ● Depopulation due to the relocation of residents from rural areas and emigration; ● The obscurity of the Republic of Moldova as a tourist destination; ● Poor quality of work on the part of some wine tourism service providers; ● Lack of developed infrastructure (e.g.: inconvenient and outdated public transport system); ● Language barriers among the main speakers of Romanian and Russian in the country; ● Expensive airline tickets; ● Expensive hotel accommodation
Opportunities	Threats
<ul style="list-style-type: none"> ● A country that is poorly explored by tourists/authentic tourist destination; ● Increased investment inflow to promote Moldova as a wine tourism destination on the world tourism market; ● The opportunity to become one of the most visited wine countries; ● The possibility of becoming a member of the European Union; ● Availability of external financial resources; ● Opportunity to attract foreign tourists 	<ul style="list-style-type: none"> ● Similar offerings in wine regions in other countries that offer better services and a more successful marketing strategy; ● Economic instability; ● Political instability; ● High level of "Corruption phenomenon"; ● Climate change; ● Impact of force majeure situations (including epidemiological restrictions under COVID-19, arid climatic conditions, etc.)

Fig. 3.7. SWOT analysis of wine tourism industry development in the Gagauzia (Republic of Moldova)

Currently, according to statements [23], in the Republic of Moldova, science, education and business institutions develop along trajectories that are often unrelated to each other. Most enterprises from the Gagauzia (Republic of Moldova) do not cooperate with vocational education institutions and with each other. The way out of this situation is the cooperation of companies in the field of innovations development, tourism development, expressed in the introduction of the more progressive experience in the practices of the lagging companies, and the development of the effective development of the activity areas (including wine tourism)

Researchers in the field of establishing and strengthening partnerships in business propose multi-variable areas of stakeholder cooperation. The analysis of structural interaction allows forming the following spheres of interaction of stakeholders in the wine tourism industry in the country (see Figure 3.8.):

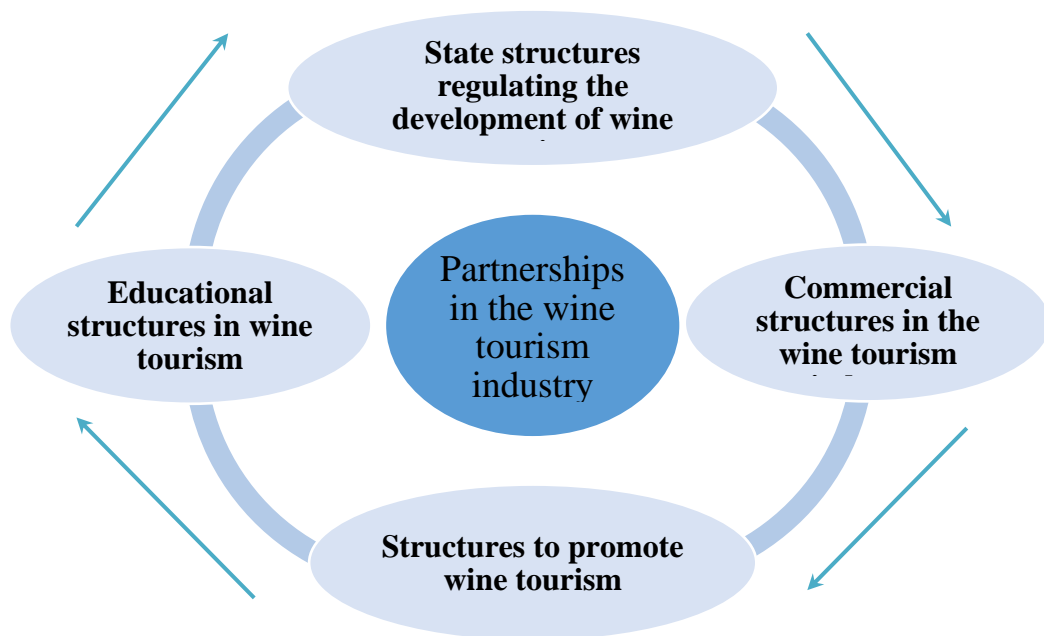


Fig. 3.8. Interaction of partners in the wine tourism cluster of the Republic of Moldova
Table 3.3.

Functions of the key partners in the wine tourism cluster of the Republic of Moldova

Partner structures	Partners	Functions of partners
Educational structures in wine tourism	-Comrat State University (Department of Economics); -Comrat College named after Mihail Chakir (department of tourism, specialty "Tourist agent"); -Professional schools: sommeliers, restaurateurs, hotel services specialists, etc.	- Knowledge training in the tourism industry in general, and wine tourism in particular; -learning new skills in the wine tourism industry; -Training of specialists in the field of wine tourism, in the field of "folk art", in the

		<p>field of "traditional national cuisine", in the field of "accommodation and transfer of tourists";</p> <ul style="list-style-type: none"> -development of the system of dual education in tourism; -organization and development of the system of continuous education within the framework of advanced training courses for wine tourism industry employees, etc.
<p>State structures regulating the development of wine tourism</p>	<ul style="list-style-type: none"> -Ministry of Economy of the Republic of Moldova (collegium of the Ministry of Tourism; advisory council in the field of tourism); -Ministry of Agriculture and Food Products (National Bureau of Wine and Grapes of the Republic of Moldova; Regional Development Agency of Gagauzia); - Agency of Public Services of the Republic of Moldova; -State Agency on Intellectual Property of the Republic of Moldova; - Main Department of Economic Development and Tourism of Gagauzia (Department for Tourism Development and Promotion); - Main Department of Culture of Gagauzia (Department of Art Support and Folk Art); Local Public Administration Authorities (Mayor's Offices and Local Councils), etc. 	<ul style="list-style-type: none"> -Development of policies in the field of tourism management in general, wine tourism in particular, at national/regional levels; - monitoring of tourism wine heritage, registration of wine tourist routes, classification of tourist reception structures and maintenance of their register; - promotion of wine tourism; -providing support and assistance to economic agents in attracting investments and concluding agreements with investors in the development of wine tourism; -attraction and implementation of projects and programmes, funded with the support of development partners, aimed at promoting wine tourism; - organization of participation in international exhibitions and fairs, promotional events, as well as business missions in the Republic of Moldova and abroad, etc.

<p>Commercial structures in the wine tourism industry</p>	<ul style="list-style-type: none"> - Wineries in the Republic of Moldova (more than 200 enterprises in the Republic of Moldova (including 17 registered in Gagauzia) -Tourist accommodation enterprises (14 hotels and guest houses in Gagauzia) Public catering enterprises (178 restaurants, cafes, bars, and buffets in Gagauzia) -Passenger transport enterprises; -Insurance companies; - Companies for the production and sale of souvenirs, folklore products, wine products; -Specialized liquor stores; -Ethno-cultural complexes, rural guesthouses; -Travel agencies, etc. 	<ul style="list-style-type: none"> -organization and management of wine tourism routes; -organizing and managing the process of tourist accommodation; -organizing and managing the process of catering for tourists; -Organizing and managing the tourist transfer process; -organization and management of the tourist insurance process; - organization and management of sales of souvenirs, handicrafts, wine products; -organizing and managing the process of promoting ethnic and cultural authenticity of peoples living in the country; - organization and management of the sales process of tourist tours, etc.
<p>Structures to promote wine tourism</p>	<ul style="list-style-type: none"> - Tourist Information Centers; - The Grape and Wine Foundation of the Republic of Moldova; -Local initiative groups of Gagauzia settlements; - Museums; - Medical facilities; - Insurance companies, etc. 	<ul style="list-style-type: none"> - promotion of the image of wine tourism in the domestic and international markets; - increasing the competitiveness of the wine tourism sector; -reference and information provision for tourists on wine-tourism routes; -development of project proposals for the development of winegrowing and winemaking industry and wine tourism industry; -attraction of investment resources to the development of winegrowing and winemaking industry and wine tourism industry;

		<p>-promote the history and culture of peoples, localities, including the history and traditions of wine and grapes; -providing medical care for tourists, etc.</p>
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Based on the analysis of world wine tourism clusters we have developed a structural model of the cluster (Figure 3.9.):

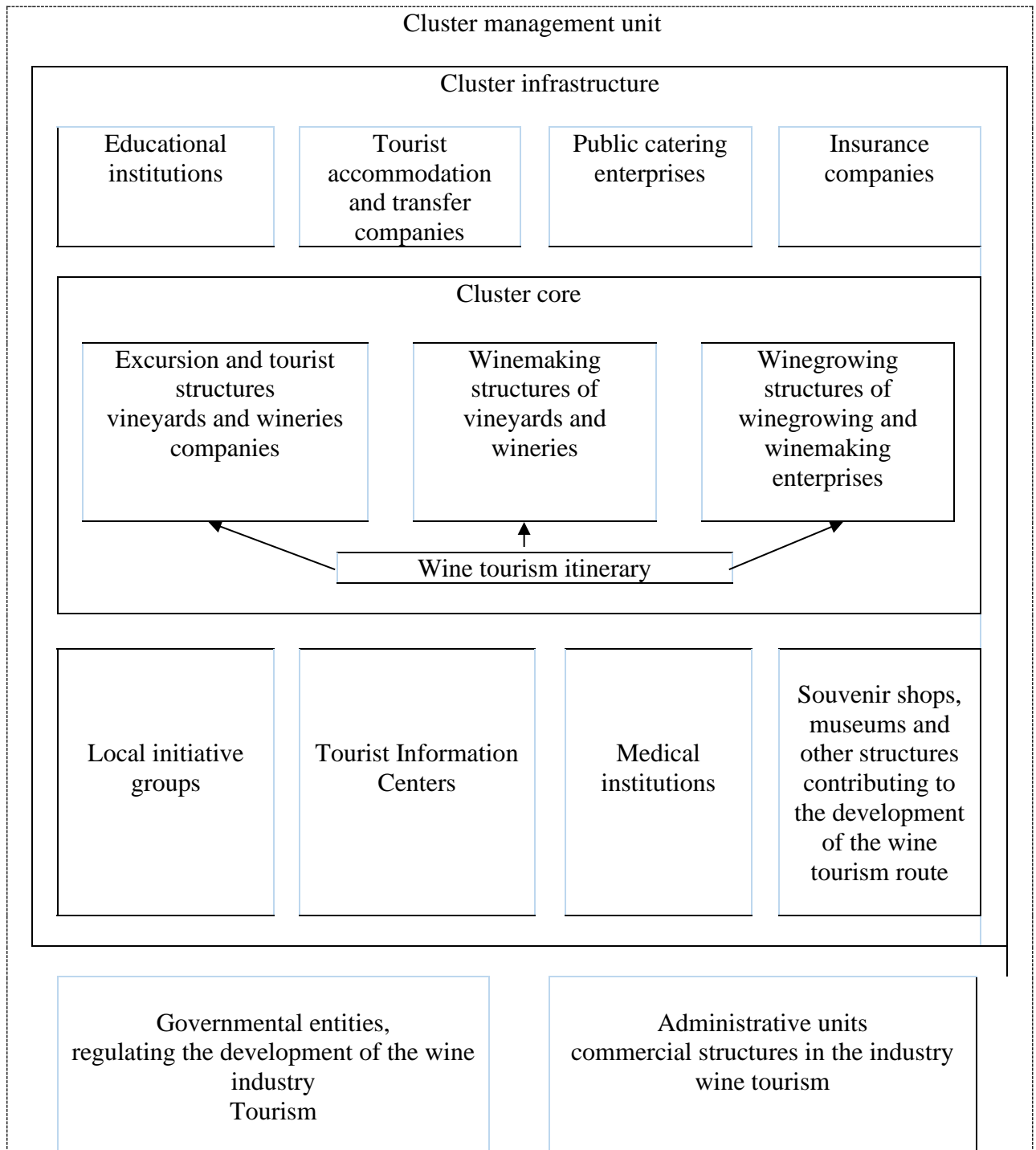


Fig. 3.9. Structure of wine tourism cluster in Gagauzia (Republic of Moldova)

As it can be seen on the scheme, the wine tourism cluster of Gagauzia (Republic of Moldova), implementing a specific service - wine tourist route (see the core of the cluster), implements activities expanding the offer on two markets - wine tourism industry and wine products of winegrowing and winemaking production. At the same time, each member of the cluster cooperation maintains its economic independence, while gaining additional benefits from the advantageous partnership relations

Conclusions

Thus, the study of the conceptual foundations of the conditions of formation and real possibilities for the development of the wine tourism cluster in Gagauzia (Republic of Moldova) has revealed the following conditions:

- 1) Availability of objects of interest for tourists (domestic and foreign). These include: vineyards and wineries, tasting rooms, wine cellars, specialized wine shops, festivals, natural recreational and cultural and social tourist resources: natural, cultural, historical monuments, etc;
- 2) The need for further development of infrastructure (accommodation, catering, tourist transfer, etc., through the prism of perception of wine tourism cluster as an attractive area for tourists with the necessary facilities, facilities and services to meet recreational needs;
- 3) Further development of modernized ITC (information communication technologies), which provide information to tourists about the wine tourism cluster, act as an important tool for shaping tourist demand and form an attractive brand of the cluster;
- 4) Further development and support of well-developed transport infrastructure, catering and accommodation systems for tourists. It is crucial for tourists to have developed internal links and transport services (car rental; provision of quality local shuttle services for sightseeing tours and transfers to accommodation, catering, shows);
- 5) Ensuring effective management of the wine tourism cluster through the development of a common action program, preparation of producers of wine products to function in a new environment, coordination of partner companies in the implementation of wine tourism routes, training of staff with appropriate qualifications, etc;
- 6) Creation of the normative and legal framework to support cluster formation and development at the national and regional levels.

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“The European Union is made up of 27 Member States who have decided to gradually link together their knowhow, resources and destinies. Together, during a period of enlargement of 50 years, they have built a zone of stability, democracy and sustainable development whilst maintaining cultural diversity, tolerance and individual freedoms. The European Union is committed to sharing its achievements and its values with countries and peoples beyond its borders”.

