SEÇÃO / SECTION / SECCIÓN
ENSAIO TEÓRICO / THEORETICAL ESSAY / ENSAYO TEÓRICO

BALKAN MIGRATION CRISIS AND ITS IMPACT ON TOURISM

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Abstract

This paper attempts to quantify, understand and analyse the effect of the migrant flows upon tourism destinations, considering the funnel theory, as a system, focusing on the beginning (inputs), through (throughput) and at the end of the funnel (outputs). Empirically, the research examines three key questions: 1. Importance of tourism economically to countries in the West Balkan Migrant Corridor; 2. Intensive nature of tourism for these countries; 3. Socio-economic consequences of the migrant flows. The crisis and its effects on tourism looks at a funnel that transmits migrants from the Aegean Sea through the West Balkans to North-West Europe. Importantly, the funnel crisis points are in Greece (beginning) and in Germany (end); the intermediate problem areas (Macedonia, Serbia, Croatia, Slovenia) have been in the throughput of the migrants through the funnel. It must also take account of the security situation in Turkey as well as the difficulty of EU member states in assimilating migrants on the route. Based on the results of the research conducted to date, with the sectional sample data from 2014-2017, it is possible to affirm that the migration crisis in West Balkans countries and countries connected to the migrant corridor has impacted only marginally on tourism. However, This problem is socio-economic yet deeply humanitarian; whilst unfortunate to reduce a deeply disturbing human issue, such an analysis of "people-flows through the funnel" allows an attempt to quantify, understand and analyse the effect of the migrant flows upon tourism destinations.

Keywords: Migration. Tourism. Crisis. Balkan.

A CRISE MIGRATÓRIA NOS BALCÃS E SEU IMPACTO SOBRE O TURISMO

Resumo

Este trabalho tenta quantificar, compreender e analisar o efeito dos fluxos migratórios sobre os destinos turísticos através da teoria do funil, como um sistema, focalizando seu início (inputs), seu processamento (throughput) e saídas (outputs). Empiricamente, a pesquisa examina três questões-chave: 1. Importância do turismo economicamente para os países do Corredor Migrante dos Balcãs Ocidentais; 2. Natureza intensiva do turismo para esses países; 3. Conseqüências sócio-econômicas dos fluxos migratórios. A crise e seus efeitos sobre o turismo fazem um funil que transmite migrantes do mar Egeu através dos Balcãs Ocidentais para a Europa do Noroeste. Destaca-se que os pontos de crise do funil estão na Grécia (início) e na Alemanha (final); as áreas problemáticas intermediárias (Macedónia, Sérvia, Croácia, Eslovênia) tem feito o processamento dos migrantes através do funil. Também é considerada aqui a situação de segurança na Turquia, bem como a dificuldade dos Estados membros da UE em assimilar os migrantes vindos desta rota. Com base nos dados proporcionados pela pesquisa, entre 2014-2017, pode-se afirmar que a crise de migração nos países dos países dos Balcãs Ocidentais e países ligados ao corredor de migrantes tem impactado apenas marginalmente o turismo. Todavia, tal questão paraece apresentar-se mais sob o prisma de problema socioeconômico, profundamente humanitário e perturbador, cuja análise dos "fluxos de pessoas" através de um corredor de trânsito parece ser uma redução limitada e inadequada daquela questão humana.

Palavras Chave: Migration. Tourism. Crisis. Balkan.

LA CRISIS MIGRATÓRIA EN LOS BALCANES Y SU IMPACTO SOBRE EL TURISMO

Resumen

Este trabajo intenta cuantificar, comprender y analizar el efecto de los flujos migratorios sobre los destinos turísticos a través de la teoría del funil, como un sistema, con alcance en su início (inputs), su procesamiento (throughtput), y sus saidas (outputs). Empíricamente, la investigación examina algunas cuestiones clave: 1. Importancia económica del turismo en los países del corredor migratorio de los Balcanes Occidentales; 2. Naturaleza intensiva del turismo para estos países; 3. Consecuencias socioeconómicas de los flujos migratorios. La crisis y los efectos sobre el turismo se centra en un embudo que transmite a los migrantes del Mar Egeo a través de los Balcanes Occidentales al noroeste de Europa. Es importante destacar que los puntos de crisis del embudo son en Grecia (principio) y en Alemania (final); las zonas problemáticas intermedias (Macedonia, Serbia, Croacia, Eslovenia) han estado en el flujo de los migrantes a través del embudo. También se cosndiera la situación de seguridad en Turquía, así como la dificultad de los Estados miembros de la UE para asimilar a los migrantes en la ruta. Basada en los datos de la investigación, entre 2014-2017, se puede afirmar que la crisis migratoria en los países de los Balcanes Occidentales y los países conectados con el corredor migratorio ha impactado marginalmente en el turismo. Todavía, la cuestión parece presentarse más como un problema socioeconómico, profundamente humanitario y perturbador, cuyo análisis de "flujos de personas" a través de un corredor de tránsito suelle ser una reducción desafortunada de dicha cuestión humana.

Palabras Clave: Migration. Tourism. Crisis. Balkan.

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1 INTRODUCTION

We would set out the process by which we have conducted our review, bearing in mind that the migrant flows of 2014-2016 created an issue which was previously unknown in Europe since the drastic movements of nationalities and displaced people in 1918-1922 and again in 1944-1947. What effect did these huge migrationary flows have on tourism and how may it have affected the perspective and views of potential tourism visitors?

1.1 Original basis of the research

The basis for this research was to assess the impact on tourism in a number of EU countries (Greece, Croatia, Slovenia) and non-EU countries (Macedonia and Serbia) as a result of the significant flow of refugees from the conflicts in Iraq and Syria from 2014-2016. This was the flow through what may be identified as the West Balkan corridor - Greece-Macedonia-Serbia-Croatia-Slovenia. The research looked at the effects on tourism in Greece, Croatia and Slovenia; at the same time, the research observed a significant shift of tourism away from Turkey, Morocco and Tunisia as the result of terrorist actions and consequential increased flows towards Greece, Italy, Spain and Portugal.

This therefore requires not only observation of the effect of the refugee crisis pathway through SE Europe towards the Nothern European safe havens (Germany, Sweden and to a degree the UK) but also the impact these flows had on tourism during and after that period.

1.2 Changing situation

The situation has changed significantly since April 2016 on the West Balkan migration corridor from Turkey through Greece to Serbia and onwards into other EU countries. The year-on-year data from April 2016 to April 2017 indicates a 68% decline in migrant flows (FRONTEX, 2017). During April 2017, the Turkish authorities intercepted 2,500 migrants (mainly from Iraq and Syria) seeking to cross over to the Greek islands. Furthermore, FRONTEX reported (FRONTEX Press Release) that illegal frontier crossing reported at Border Crossing Posts (BCPs) in the West Balkan Stability Pact Region were under 100 persons. It appears that the majority of these individuals had been temporarily resident in Serbia (having crossed through the Greece-Macedonia-Serbia route) and were unsuccessfully seeking entry into Croatia, Hungary or Romania.

When we look at the main immigration flows across the Mediterranean, the picture has changed significantly since 2015-2016 when the the major flows were through the Eastern Mediterranean-West Balkan corridor and mainly consisted of refugees from the chronic situation in Iraq and Syria. Now the main flows are in the Central Mediterranean routes - from Libya and Tunisia through Malta and Italy; in the first four months of 2017, the flow had increased by 33% over the same period in 2016. Importantly, this flow was from Bangladesh, Côte d'Ivoire and Nigeria - thus predominantly economic migrants heading towards Italy and France (FRONTEX).

1.3 Issues for affected countries

It would appear that the potential effects of migrant flows remain for Greece, Macedonia and Serbia - and to a lesser extent for Bosnia & Hercegovina, Croatia and Montenegro. There certainly is a small scale routing of migrants from Serbia through the porous Serbia-BiH or Albania-BiH borders then through Montenegro and into Croatia, but this insignificant compared to the massive flows seen during 2015 into early 2016, via the main West Balkan corridor.

A significant problem that now exists is in respect of refugees, migrants and asylum seekers in Serbia. There has been massive growth in the numbers of migrants now temporarily living in Serbia due to their inability to travel north out of the country to their favoured destinations. The ramifications of this situation are covered in the "Case Study Serbia".

1.3.1 Raising key questions?

To seek to ascertain the effects, in our research we are mindful of the following questions: 1. How important is tourism in economic terms to these countries in the West Balkan Corridor? 2. How important is tourism as an intensive engagement in labour market activity in these countries? 3. What estimates may we make of variations to the share of tourists in these countries?

We can estimate this both through existing tourism data as well as less empirical information such as tourism flight destination shifts, which displays the view of tourists about their favoured destinations.

1.4 Background issues

Refugee movements towards Europe are not a new phenomenon. Depending on the areas of conflict from which they have sought to escape, refugees have reached Europe via different routes. In 2005, thousands of sub-Saharan African refugees used the Spanish enclaves of Ceuta and Melilla as their major entry point to the EU via the western Mediterranean. In 2011, civil unrest in Tunisia and the fall of the Gaddafi regime in Libya spurred massive movements on the central Mediterranean route to the Italian island of Lampedusa. In 2014, refugee numbers reached a staggering level, marking a record for the EU.

The 2015 Fragile States Index places countries such as South Sudan, Somalia, the Central African Republic, Syria and Afghanistan atop the global list of humanitarian emergencies. Having started in 2011, the Syrian conflict is now among the strongest drivers for refugees coming to Europe (according to Eurostat around 29% of all refugees are Syrian). Around 4 million Syrians have fled to Jordan, Lebanon, Turkey and Egypt, facing dire living conditions, restricted movement and no right to work. Poor governance and lack of political accountability are yet other reasons why people – 'economic migrants' – flee. Thus, a mix of violence, dysfunctional political systems, decreasing international aid and globalisation in general, are all triggers that push more and more people to cross borders. Migrants have certainly different reasons, backgrounds, pressures on their society and themselves as individuals, which places them in the situation to migrate.

'Mixed migration' is not a new problem for the EU. The term applies to migration flows that confound the EU's distinction between forced (political asylum, protection) and voluntary (economically-motivated) migration (UNHCR 2007) economic migrants try to gain access to the EU by pointing to human rights problems at home for instance, or refugees use irregular modes of accessing the EU associated with economic migrants. But now a new kind of mixed migration flow is both experienced and predicted, comprising terrorists and radicals. EU officials worry about individuals who are implacably opposed to the EU gaining entry, hidden amongst the economic migrants and refugees.

A simple illustration of the EU's political decline: fifteen years ago at Tampere, EU leaders bound themselves to a rather ambitious goal. They pledged to treat immigrants from outside the EU as they would the EU citizens working in their country. Or to put it another way: they would, as far as possible, extend to 'third-country-nationals' the generous economic and political rights enjoyed by their own migrant nationals under EU law. Up until that point, EU leaders had focused their efforts on trying to exempt intra-EU workers from the general stigma attached to the term 'migrant' in Europe. Citizens of one EU member state working in another were referred to first as "free movers" and then as "European citizens". At Tampere, EU leaders were thus going a significant step further – they were trying to apply this liberal terminology to immigrants who had entered the EU and to exempt them also from stigma. Today, 15 years later, the reverse is the norm: mobile EU citizens are now treated like workers from outside the bloc, and face hostility and protectionism (GHIMIS et al).

The Balkan migrant route – running through Macedonia and Serbia to Hungary, or Croatia, Slovenia and Austria – became the main entry point for refugees making their way to northern Europe in 2014-2016. Since 2014, the number of migrants crossing this route has increased 16-fold, with close to 800,000 migrants, mostly from Syria, Afghanistan, and Iraq, taking it to date. Between October 2015 and March 2016, more than 500,000 migrants arrived in Serbia and Macedonia. Importantly, the crisis has also strengthened the illicit economic sectors that hamper the region's democratic and rule of law development. The profits to be gained from human trafficking have resurrected mafia networks from the time of the embargo against Yugoslavia.

Despite these pressures, the Western Balkan countries have been largely cooperative in responding to the crisis – at least in the early stages, as long as the migrants continued northward. However, this cooperation has rested on the condition that the borders to the north remain open and that the Western Balkans do not become Europe's dumping ground for refugees. When Hungary fortified its southern border, and Croatia and Slovenia restricted entry in September 2015, acrimony quickly followed. Bilateral relations in the Western Balkans quickly deteriorated, and regional leaders traded insults and accusations, drawing on tensions dating back to the Yugoslav wars.

2 DESCRIPTION OF THE PROBLEM, AIM AND METHODOLOGY

2.1 Description of the problem

The financial impact of immigration to or migration through a country is dependent upon a number of factors. These include the characterisation of the migrants (e.g. economic migrants, or asylum seekers from war and persecution), the level of skills and education of the migrants, the countries of origin affecting the prioritisation of migrants seeking legal residency, and the extent of the immigration or migration. Other factors are also:

- the ability or inability of the host country to effectively organise, process and assimilate, transfer or deport the immigrants;
- the extent to which the remaining immigrants become legally documented or remain undocumented and go "underground" and the

degree of resulting socio-economic isolation or assimilation of immigrants into their new host societies which will affect levels of social harmony or dissent;

- crime and the underground grey economy that expands with undocumented and disenfranchised workers.

These factors, in turn, impact economic growth depending on the effect that the immigration has on growth. Such factors as the labour market and GDP productivity, the amount of various types of tax revenues generated for the host country by the consumption and economic activity of the immigrants and the level of government expenditures associated with immigration such as for social welfare, administrative and security services.

One type of financial impact from the main 2015-2016 wave of asylum seekers from war-torn countries can be illustrated by the case of Germany. Here, in 2015, the country faced a total influx of around 800,000 refugees mainly from the Middle East and Africa with an estimated cost of up to EUR10 billion. According to the Financial Times (18.09.15), in 2015 immigrants already accounted for 12.3% of the national population.

These figures may, to an extent, have minimised the social and financial impact which immigration has created on economic sectors such as tourism. But has this impact been significant? Different tourism crises including natural disasters, such as diseases, economic downturns, political instability and war, recently also terrorism, violence and crime, have been examined in the growing stream of research work (e.g. HALL, 2010; RITCHIE, 2004; WANG; RITCHIE, 2012). The phenomenon of migration and its effect on an economy such as tourism in W Balkans has not been widely researched to a significant extent in recent years. Our research found very little comparative or topical material – primarily due to the fact that this is relatively new phenomena, which emerged in the second part of 2015 in terms of the West Balkan Corridor and the connected regions.

Certainly the refugee crisis has forced Europe, during late 2015 and into 2016, to put the Western Balkans back onto the agenda. As we have already mentioned, the West Balkan migrant route – running from Greece through Macedonia and Serbia to Hungary/Croatia then Slovenia and Austria – became the main entry corridor for refugees making their way to northern Europe in 2015. The crisis placed tremendous pressure on the region and stretched institutional capacities to breaking point. Further in Hungary, it may appear to have had an impact on the development of a powerful anti-migrant, pro-nationalist trend which resulted in the closure of the Hungarian frontier to migrants and an increase in racist attacks on foreigners.

In November 2015, Slovenia and Croatia closed their borders to economic migrants and restricted entry to Syrians, Afghans, and Iraqis. Macedonia and Serbia immediately followed suit. In February 2016, pressures to close the Balkan route gained traction in Austria and the Western Balkans, leaving thousands of refugees stranded in Greece. The EU–Turkey summit of March 2016 announced that the Balkan route had "come to an end" but focused on the urgency of the situation in Greece, failing to adopt any groundbreaking measure for the non-EU Western Balkan countries. As a result, thousands of migrants were stranded at the Greek-Macedonian border in a makeshift refugee camp near the village of Idomeni, following a three-week standoff between Greece and Macedonia, as well as Serbia, Croatia and Slovenia, which adamantly opposed allowing refugees to continue their journey to the prosperous north. Having become a buffer zone or, worse, a dumping ground for refugees, the countries on the Western Balkan route found it hard to cope with the humanitarian, security, and administrative burden. In a sense Macedonia and Serbia became the guardians of the Schengen space, without even being close to EU membership.

2.2 Aim and methodology

The aim of our paper is therefore to consider the effect of the West Balkan migratory route from the Middle East through to Central and Northern Europe and the extent to which this may affect and impact on tourism in those countries immediately concerned with the migrant flows. Namely, parallel to the development of migration events in Wersten Balkan countries some speculation began on how this migrant flow would affect the economy and in particular, the tourism sector in the countries of the Western Balkans. In the text following this chapter, we address this situation, we believe as kind of trail-blazers given the low level of research in this area. In the detail and data presented below we attempt to provide some conclusions and follow-up points.

Primarily the methodology we applied was to access information on migrant flows through the West Balkan Corridor and then to relate the timing of those flows to any perceived changes in tourism flows in those same regions. The majority of data related to 2015 and 2016, with limited access to data for the first four-five months of 2017. This has been supplemented by our own modelling assumptions based on trends expected over the short-medium term in the region.

It is evident that the situation with migrant inflows only emerged during the latter half of 2015 as the Syrian crisis intensified. Therefore there is simply no significantly topical past research or appropriate data dealing with these issues. In our opinion, this paper represents a pioneer work and provides a potential impetus for future more detailed research on this topic.

We also have to address the issue of terminology regarding the use of the term "migrant". We are using this term through this paper to describe those entering the EU from non-EU states, irrespective of whether they may potentially have refugee status, are asylum seekers or economic migrants.

3 MIGRATION THROUGH THE WEST BALKAN CORRIDOR

3.1 Migration flow overview

The West Balkan route was described by FRONTEX as "a popular passageway into the EU" since 2012 when Schengen visa restrictions were relaxed for the five West Balkan Stability Pact (WBSP) countries (Albania, Bosnia & Hercegovina, Montenegro, Serbia and Macedonia). This resulted in 19,950 illegal border crossings from Serbia into Hungary in 2013, which rose to 43,360 in 2015. At this point, the northwards flow of Syrians and Somalis, was augmented by Kosovo Albanians and other economic migrants from the WBSP countries seeking to reach Austria, Germany and Sweden.

A primary issue was that because the majority of migrants had Germany (or in some cases Austria and Sweden) as their ultimate destination, they were unwilling to submit to refugee or asylum registration in Greece or indeed any of the other "corridor" countries. Border controls on the Eastern Aegean, the first landing point in the Schengen Zone, were difficult to maintain due to the high flow of migrants. Decisions to restrict transfer through the Greece-Serbia-Austria-Germany corridor to Syrian, Iraqi or Afghan refugees proved difficult to manage given the lack of secure, valid documentation presented by migrants at the point of entry into Greece.

Certainly, the situation improved towards the latter part of 2015, as EU and West Balkan countries adopted higher levels of co-operation to manage the migrant flows. But at the same time, the degree of co-operation was effectively imposed through the action of Hungary in first closing the land border with Serbia and then latterly the land border with Croatia. This then forced migrant flows along the Belgrade-Zagreb corridor towards the Croatian-Slovenian border crossing at Bregana, and resulted in further issues with stranded migrants.

A major problem that propelled migrants from Syria and Iraq to take this land route from Turkey to Austria, Germany and Sweden, was the expectation from a variety of news and social media sources that this was the most direct route and that they would be assisted to travel through it. Subsequently, economic migrants from Afghanistan, Iran, Pakistan and some African countries, saw value in attaching themselves to these migrant flows - given the poor level of border controls and identification.

3.2 Current trends

The non-regional [1] flows transiting the West Balkan Corridor from 2015 amounted to some 2 million individuals; according to FRONTEX data (FRONTEX, 2016) this was approximately 30 times greater than in 2014. In 2013, illegal border crossing on the West Balkan Corridor amounted to 40,027; in 2014 this rose to 66,079 and in 2015 to 2,081,366. In the period 1 January 2015 to 31 December 2016, the number of illegal crossings fell from 27,920 to 4,621 - a change of -83.5%. However, according to UNHCR reports, by May 2017, as illegal sea crossings from Turkey to Greece fell by 98% year-on-year, those managing to make passage from Greece northwards fell by 99% year-on-year.

As may be seen from ***Table A*** below, the highest levels of migrant flows through the West Balkan corridor were in Q3 2015 with an increase of 653% and Q4 2015 with an increase of 117%; in Q4 2015 the migrant flows reached their highest level at 1.34 million (FRONTEX). As can be seen from this data, flows declined rapidly from early in 2016 throughout that year. Indeed, by end December 2016, the flow of illegal crossings had declined by 99% year-on-year.

In Q1 2017, the most recent data reported by FRONTEX FRAN analysis showed that whilst there were 7,648 migrant crossings from Turkey towards Greece and Bulgaria, there were only 3,558 crossings over the West Balkan corridor into EU countries. The discrepancy may be explained by the number of refugees, asylum seekers and refugees held in Greece and those currently in Serbia. We also have to allow for the time lag; for example in Q4 of 2016, there were 9,006 crossings from Turkey, which may then match with the 3,558 crossing in the next quarter over the West Balkan route.

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[1] "Non-regional" is a term to represent migrants from outside the West Balkan region - Albania, Bosnia & Hercegovina, Kosovo, Macedonia, Montenegro and Serbia. NOTE: *The use of the term Kosovo is a geographic territorial description and without any comment on the sovereign or political status of that territory.*

A significant issue is the nationality of migrants; In March 2015 only 0.3% were classified as "non-specified nationality", this means that they either had no ID documentation or had only registration papers from entering Greece which failed to identify nationality. By the end of September 2015, this group had risen to 40.3% and by end-March 2016 to 50.5%; yet by end September 2016 those with "non-specified nationality" had fallen to 14.7%.

Table A: Illegal crossings at Border Crossing Posts (BCPs) on EU external frontier - quarterly data.

ILLEGAL BCPs	Q2/15	Q3/15	Q4/15	Q1/16	Q2/16	Q3/16	Q4/16
quarterly change	67.9%	653.1%	117.3%	-83.7%	-86.7%	-65.2%	-53.9%

Source: European Border & Coastguard Agency, FRONTEX, 2017.

It should be commented upon that whilst the main transit route has been from Turkey, through Greece, Macedonia and Serbia and thereafter via Hungary/Croatia, an alternative, but lower flow level route has been Turkey-Bulgaria-Serbia then Hungary or Croatia. Also some smaller flows have been detected by FRONTEX through Greece-Albania-Montenegro-Bosnia & Hercegovina-Serbia; this latter route has also attracted economic migrants from Kosovo.

3.3 The end of the migrant flow corridor

We can see that Slovenia did during the height of the problem become the effective end of the migrant funnel for re-entry into the Schengen Zone, and thus border-free access to most of the rest of Northern Europe – particularly Germany and Sweden. Whilst Croatia is an EU member it is not currently part of Schengen, and therefore the Slovenian border between Croatia and Slovenia on the main highway Zagreb-Ljubljana was a main destination focus for the migrants.

During the period from 16 October to 31 December 2015, the number of migrants entering Slovenia (mainly via the Bregana road crossing or the Dobovo rail crossing) from Croatia, amounted to over 377,000 individuals. Yet in effect, the same numbers left Slovenia; this indicates that as with Serbia and Croatia, Slovenia was simply a transit corridor to the perceived wonders of Germany and Sweden. The data provided by the Slovenian Police[2] , would tend to indicate that generally the migrants spent between 1-4 days in transiting Slovenia between the crossing from Croatia and their entry into Austrian territory at the Karavanke road/rail interchange. Indeed, the total number of refugees and asylum seekers on Slovenian territory as at 15 July 2016 amounted to 289 (256 asylum seekers, 19 refugees and 14 displaced persons); these numbers do of course include inter-regional migrants from Albania, Bosnia & Hercegovina, and Kosovo as well as refugees from the Africa/Middle East. In March 2017 only 41 individuals arrived in Slovenia seeking residence, of those 24 were from Syria.

4 THE TOURISM OVERVIEW

4.1 Tourism data

The objective of the data provided in ***Tables B, C, D, E*** and ***F*** (below) is to indicate the role of tourism in the economies of a number of countries on the "refugee road" during the period under discussion. The countries included are those which were affected to some degree by transit through the West Balkan route, from Greece at the beginning, through Bulgaria, Macedonia and Serbia and on to Croatia and Slovenia.

Table B: Tourism gross receipts as a % contribution to GDP.

Country	2015
Bulgaria	6.3%
Croatia	18.1%
Greece	8.0%
Slovenia	5.9%
EU 28 average	0.8%
Macedonia	*1.3%*
Serbia	*0.7%*

Source: EUROSTAT (2017a).

The above data measures the role in which income from foreign tourism activity is a feature of the national GDP. Clearly Croatia has a very significant sector of its national wealth driven by tourism, and other countries in the region are also well above the EU average, apart from Serbia.

The following data displays the net receipts from tourism - this is taking the income from foreign tourism activity and deducting outbound tourism spending by residents. This figure is important in the national income relating to the Balance of Payments, an important element of GDP growth, given that as with net goods exports (exports-imports), tourism is an effective part of the net export of services and also relates strongly to currency balances and foreign exchange earnings. This data shows that a number of economies on the refugee road (e.g. Croatia, Greece and Slovenia) managed to achieve net GDP contribution growth from tourism in

[2] www.policija.si

2015 over 2014. Serbia proved to be an anomaly in this respect and may therefore be an issue for more detailed analysis and investigation.

Table C: Tourism net receipts as a % contribution to GDP*.

Country	2014	2015
Bulgaria	4.9%	4.1%
Croatia	15.7%	16.5%
Greece	6.4%	6.8%
Slovenia	3.5%	3.8%
Macedonia	*1.3%*	*1.1%*
Serbia	*0.7%*	*-0.2%*

*****net receipts = gross income from foreign tourism visitors - domestic tourism payments for outbound tourism*
Source: EUROSTAT (2017b).

Moving from macro-economically focused data, it is then useful to look at foreign tourism inflows measured by the annual change in tourism nights. The most recent data from Eurostat indicates the growth in non-resident tourism nights in 2016 over 2015. This would tend to indicate that Croatia, Slovenia and Serbia have not suffered in any way from the huge throughput of migrants through the refugee corridor during 2014-2016. The figures for Greece are less decisive; they indicate a level of growth below the EU average, yet at the same time we have to acknowledge that there has been a marginal growth in net tourism receipts as a component of GDP.

Table D: Tourism non-resident nights spent at tourism establishments.

Country	2016 year-on-year change
Bulgaria	+21.0%
Croatia	+9.6%
Greece	+0.2%
Slovenia	+10.3%
EU 28 average	+3.6%
Macedonia	*+2.6%*
Serbia	*+12.2%*

Source: EUROSTAT (2017c).

Table E: **Tourism non-resident nights as proportion of population in 2016.**

Country	Nights/population %	Tourist nights as % of EU 28
Bulgaria	225%	1.2%
Croatia	1,714%	5.5%
Greece	726%	6.0%
Slovenia	329%	0.5%
Macedonia	*48%*	No data
Serbia	*38%*	No data

Source: Authors' estimations using Eurostat and UNWTO data with projections.

Labour force data is only available for the EU28 countries; data for Macedmoic and Serbia - for example - is inconsistent with the Eurostat material. However, in ***Table F*** - if for example we examine countries on the refugee road – indicates a number of variations. Slovenia is closest to the EU28 average in terms of the tourism labour force as part of the non-financial labour force (i.e. manufacturing, services, intermediation). Greece is slightly higher, and Croatia is the highest in the region.

Table F: Estimates of tourist labour force as % of non-financial businesses in 2016.

Country	Estimated tourist labour force
Bulgaria	2.5%
Croatia	11.2%
Greece	4.4%
Slovenia	2.3%
EU 28	2.4%

Source: Authors' estimations using Eurostat and national data with projections (EUROSTAT, 2017d).

4.2 Tourist sentiment

Tourism sentiment, the attitude of tourists to specific destinations in terms of interest, cost, ability to access and safety, is both partly unquantifiable and subject to rapid change. However, the effect of the massive migratory shift through Greece during 2015 appears to have had little real impact in tourism sentiment towards Greece as a holiday destination. As we have seen, tourism flows in real terms into Greece have not changed, but they have not fallen, and continue to contribute a singificant amount to national GDP.

As an example, Greek tourist data for 2015 (Greek National Tourism Office, 2016), indicated that 2.3m UK visitors travelled to Greece for vacations despite the well and widely-reported incidence of migrant inflows to the Greek islands bordering the Turkish coast. Across Greece, the year-on-year increase from the UK at the end of 2015 was around 15%. Due to the non-availability of exact data the following information may not be completely verifiable. However, the authors estimate that the Greek islands mainly affected (which also tend to be those most visited by tourists) are:

- Lesvos - estimated 50% of migrant flows and during December 2015 around 2000 per day;
- Samos - nearest to Turkish coast (less than 2km);
- Leros - 1500 refugees arrived in September 2015 (Local tourism officials reported that there had been a decline in tourism reservations);
- Rhodes - 32km from the Turkish coast, the size of the island and the strong tourism market does not appear to have been dampened.

Whilst airline forward planning data is not empirically reliable, it does however provide a strong level of evidence of tourism sentiment and tourism destination flows. Data collected from Jet2, EasyJet and Ryanair - major low cost airlines flying to holiday destinations, indicates a strong growth in traffic capacity from UK airports towards both Greece and Croatia, with additional flights from UK regional airports to destinations such as Pula, Split and Zadar in Croatia and Corfu, Crete, Halkidiki, Kefalonia, Kos, Rhodes, Thessaloniki and Zante. Into 2018 it ould appear there has been a major shift in UK sentiment away from North African and Turkish destinations, towards Croatia, Greece as well as existing short-haul destinations in Spain and Portugal.

The chronic state of the Greek economy may undoubtedly result in action to lower prices, to provide infrastructural aid to tourism and to offer incentives to European low-cost carriers flying into Greek regional airports. Tourism is now one of the few vibrant elements of the Greek economy and together with concerns from North-west Europeans about the safety issues of vacations in Turkey, Egypt or Maghreb countries (Algeria, Morocco, Tunisia), the flow of travellers towards Greek holiday destinations - with a fairly lengthy holiday season (February-November) - may result in a significant boost towards Greece

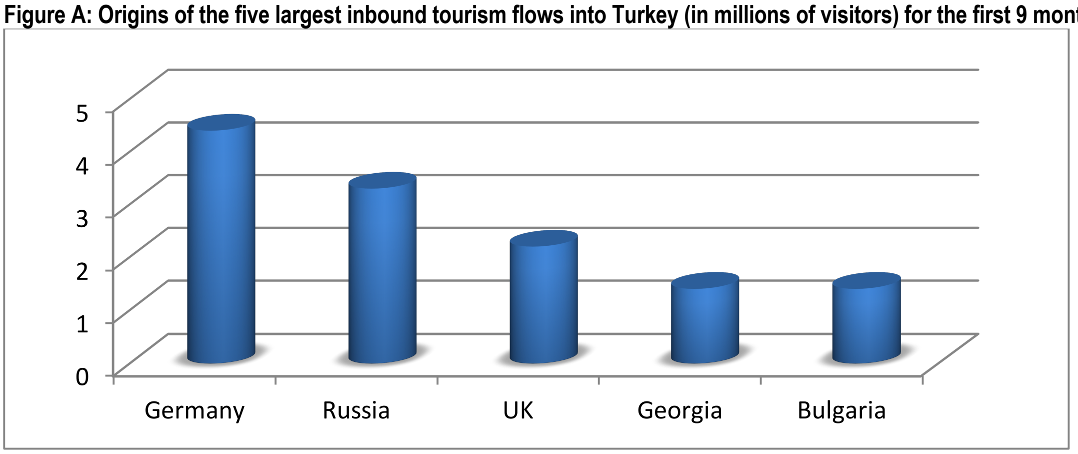
But one other factor, as yet not clearly evident or researched, is the effect of the UK exit from the EU. This has already triggered a 17% reduction in the value of the GBP against the EUR in the period from June 2016-June 2017. Whether this may see an adjustment of holiday tourism flows away from Eurozone countries is difficult to predict. In a sense both sentiment about the safety of destinations (e.g. concerns about Tunisian resorts) and the value of the tourists home currency against the local currency would appear to be more powerful factors than the effect of migrant flows along the West Balkan refugee road.

4.3 The Turkish situation

As the main launch point into the European Union for Syrian, Iraqi and Afghan migrants, Turkey has been affected by the issues of coping with the migrant flows and at the same time as reaching some degree of accommodation with the European Union. Clearly, the departure of migrants through the Turkish Aegean coast may not necessarily have disturbed Turkish tourism on that coast; the arrival of the migrants on the Greek Aegean coast appears to have a insignificant impact on tourism in the Greek Aegean islands.

However, through the latter part of 2015 and 2016, terrorist attacks in Ankara and Istanbul created concerns about the stability of Turkey as a tourism destination. The country had already lost a major part of the Russian market as a result of Turkish actions in late November 2015 against Russian aircraft supporting the Syrian government. The situation with Russia was later and recently improved on the political side, however due to political instability in Turkey country is no longer seen as a safe desitnation. The following figure indicates the tourism inflows into Turkey for the first 9 months of 2015 from the highest five tourism origins.

Figure A: Origins of the five largest inbound tourism flows into Turkey (in millions of visitors) for the first 9 months of 2015.



Source: www.kultur.gov.tr/EN,153028/researches-and-surveys.htm

Given that we may estimate that tourism accounts for around USD28bn income for Turkey and has had a profound effect on reducing the current account deficit, it is clear that any changes in a market dominated by Germany and Russia would have a profoundly negative effect, and actually this occurred in 2016. We may therefore predict, that any variation in Russian inflows – for example – would have a major effect on Turkish tourism.

The decline already manifest of 10% in the first quarter of 2016 may well be ascribed to a rapid drop in Russian tourism inflows. Added to this are the effects of the state of emergency following on the attempted coup by some groups within the Turkish defence forces in July 2016; this has resulted in a major clampdown by the Erdogan regime, which has resulted in public expressions of concerns by the European Union and many of Turkey's NATO partners. Whilst having an effect again on tourism inflows, it also raise the potential of affecting the rather delicate state of negotiations between the EU and Turkey on the processes of managing the migrant flows from Turkey through Greece and then via the West Balkan Corridor.

Erdogan's major assault on domestic critics may totally undermine the recent tacit agreements with the EU on the restriction of migrant flows through the Greeks Islands-West Balkan Corridor. EU foreign ministers have already criticised the potential attack on human rights in Turkey, and this has been further supported by NATO's political structures. Given latent animosity from Russia and Russian allies towards Turkey, it is conceivable that Turkey will turn for greater support from the Sunni powerhouse of the Gulf States. This could then stimulate further unrest in the region, especially from Syria and Syrian allies in Lebanon.

Is it possible to assume a trade-off between diminishing tourist flows from North-Western Europe into Greece instead of Turkey? Clearly the security situation in Turkey, with terrorist attacks in Ankara and Istanbul, has had an effect on tourism flows to the Turkish seaside resorts - albeit that they are located away from areas of such conflict. Nonetheless, it is a fact that the coastal regions have regularly supported the secularist centre-left parties against President Erdogan's hardly suppressed and latent Islamist tendencies.

Recent events in Turkey, would therefore indicate the possibility of stronger and harsher crackdowns on the coastal regions - which in general display greater secular and liberal tendencies in regard to such areas as consumption of alcohol and standards of female attire. Again, it may be useful to see what effect this has on the availability of low-cost and tourist charter flights into the Marmaris-Izmir-Dalaman-Antalya coastal corridor.

5 SERBIA CASE STUDY: IMPACTS AND IMPLICATIONS

5.1 The migrant situation

According to data collated by the UN High Commission for Refugees, (UNHCR "Serbia Update", March 2017 press release, Belgrade), in March 2016, 1500 refugees, migrants and asylum seekers were present in Serbia, of whom; in March 2017, following the closure of borders into EU countries through the spring of 2016, the number of refugees, migrants and asylum seekers in Serbia reached 7750. This was an increase of 417% year-on-year. Of this total in March 2017, 86% were registered as refugees or asylum seekers and housed in Serbian government accommodation and 14% were unregistered migrants (mainly living near the Hungarian and Croatian borders or in Belgrade city centre).

Obviously the presence of these refugees is impacting on the Serbian society and economy; unconfirmed reports are that 3,000 migrant children will enrol in the first year of school in autumn 2017. However, there is little doubt that in a country which has not weathered well the fall-out from the financial crisis and subsequent economic depression, with falling real incomes, the burden of 7,750 visitors of whom almost half may be children would impact heavily.

The origin of this population is of interest in that this primarily static population, when looking at major migrating groups (Afghans, Iraqis and Syrians) has a different composition to the estimated migrant flows by means of illegal border crossings. According to the authors' estimates and extrapolations (based on UNHCR and EU FRONTEX data), during the year to 31 March 2017 43% of refugee migrants and asylum seekers were Afghan, 40% Iraqi and 17% Syrian. In contrast, estimates of the country-by-composition of those travelling on the refugee route through Serbia indicates that Afghans make up 24%, Iraqis 6% and Syrians 14%.

5.2 Serbian tourism

The Serbian tourism market failed to enjoy the growth evident in neighbouring economies during the 1990's (e.g. Bulgaria and Hungary) due to the devastating effects of the Yugoslav Wars of Succession 1991-1995 and the subsequent economic and foreign policy of the ruling regime until 2001. Additionally, tourism flows were limited until 2010 by the unavailability of low cost flights into Serbia, given the effective monopoly of the state-owned carrier JAT (now Air Serbia). The opening of Serbian air space to low-cost carriers, and the use of Niš airport as a low-cost destination by Ryanair and Wizz Air has probably been beneficial to Serbian tourist growth. At the same time, the national carrier, Air Serbia, has had to offer competitive fares into its Belgrade hub.

The most recent data from Eurostat (see ***Table D***) indicates that Serbia enjoyed a 12.2% annual growth in foreign tourism in 2016 over 2015, which was well ahead of other EU candidate countries e.g.Macedonia (2.6% annual growth). At the same time, we should note that whilst tourism receipts in 2015 (i.e. income from tourism reflected in Balance of Payments income) accounted for 2.8% of GDP, tourism expenditure (i.e. spending by Serbian residents on foreign tourism reflected in Balance of Payments expenditure) stood at 3.0% of GDP, thus indicating a negative balance equivalent to 0.2% of GDP. Nonetheless, we can see that tourism is a growing component of the Serbian economy. As a result we would estimate that tourism may produce a net contribution to GDP of around 2.5% by 2023.

5.3 Connectivities?

It is difficult to suggest that the grave socio-economic impact of the refugee crisis in Serbia has any significant impact on tourism. Indeed, despite the presence of 7,750 migrants on the territory of the state, this is significantly less than the 250,000 refugees who arrived from the self-proclaimed Republic of Serbian Krajina in August 1995.

The majority of the refugees and asylum seekers from the West Balkan route are located at former military facilities across Serbia, and are not necessarily close to any main tourism features; in addition they are not permitted to take employment, and given the grey and black employment sectors in Serbia are already intensively occupied, they are highly unlikely to have any effect on the tourism labour market.

Again, because of the location of those under government protection (i.e. refugees and asylum seekers), they are unlikely to present a poor picture to visiting tourists. The only possibilities here would be in regard to tourists making the road crossings to/from Hungary or to/from Croatia, where they may see some of the around 500 migrants who are constantly seeking to cross out of Serbia and continue their journey towards Germany or Sweden. Consequently our view would be that the presence of migrants both on the refugee road and as temporary residents in Serbia has had no effect on the Serbian tourism industry.

6 CONCLUSIONS

6.1 The funnel concept

We may propose that this crisis of migration and the unresolved effects on tourism is based on the concept of a funnel that has transmitted (and continues to transmit) refugees, asylum seekers and economic migrants from the Aegean Sea through the West Balkans to North-West Europe.

Clearly the "welcoming countries" - primarily Germany and Sweden - have an open door policy towards Syrian and Iraqi migrants who have fled conflict due to ethnic/religious reasons (i.e. they are Christians, Zoroastrians or adherents to Muslim beliefs inconsistent with strict Sunni Islam - Azeris, Sufis, Alavi and Alawites). But we have to realise that the West Balkan Corridor has also been a method of transit for economic migrants. Importantly, the funnel crisis points are in Greece (beginning) and in Germany (end); the intermediate problem areas (Macedonia, Serbia, Croatia, Slovenia) have been in the throughput of the migrants through the funnel.

It may be suggested that inflows of illegal crossings into the EU from Albania and Kosovo have not diminished at the same level as those from Syria and Iraq. Indeed, they are more apparent now, as there was a degree of suspicion that a large number of un-registered illegal migrants crossing into the EU through Croatia, Hungary and (to a lesser degree) Bulgaria, were in fact from Kosovo or Albania.

This presents a rather harsh assessment of what is clearly a socio-economic and deeply humanitarian problem; it is unfortunate to analytically reduce what is clearly a deeply disturbing human problem into an analysis of "people-flows" through a transit corridor. But our task in this paper has been to attempt to quantify, understand and analyse what the effect of the migrant flows has been upon tourism destinations at the beginning of the funnel, through the funnel and at the end of the funnel.

Our initial conclusion, at this moment, would be that the migratory flows have had a significantly low impact; tourism data would tend to indicate that Norther Mediterranean countries in general are benefitting from the situation in Turkey, Egypt and North Africa, which has led to a dimunition of tourism inflows into the S and E Mediterranean regions.

Currently available data also indicates that Croatia and Slovenia have been quite unaffected by the migrant crisis in from October 2015-Aoril 2016. Frankly, the most important impacts on European tourism activity over 2015-2017 have been related to events in Brussels, London, Manchester, Istanbul, Nice and Paris - issues which are not related to migrant flows but rather concerns about the effects of terrorism actions in tourism destinations.

6.2 Some key questions

By posing the following questions, we may be able to illustrate some of the provisional conclusions we have reached, based on the intermediate evidence which we are in possession of:

1. How important is tourism in economic terms to countries in the West Balkan Corridor? According to our provisional analysis [3] of tourism net receipts against GDP (*net receipts are gross tourism income indicated on Balance of Payments statistics less domestic outward tourism payments on Balance of Payments statistics for 2014*), for the countries in the West Balkan migration corridor, the highest level of net earnings is in Croatia (15.7% of GDP). This is followed by Greece (6.4%), Bulgaria (4.9%), Macedonia (1.3%) and Serbia (0.7%). On this basis, Croatia has the highest potential sensitivity towards shifts in tourism revenue.

2. How important is tourism as an intensive activity in these countries? According to Eurostat [4] tourism intensity (*number of tourism nights per 1,000 inhabitants*) amounts to 5.3% across the 28 member states. In Croatia it amounts to 15.6%, in Greece 8.7% and in Bulgaria 3.0%.

3. *What estimates can we make of the share of foreign tourists in EU28 members?* According to our provisional analysis[5], we would suggest that the Top 10 destinations for tourism in the EU28 for 2018 are likely to be as per the following table:

Table G: Top 10 destinations for tourism in the EU for 2016.

Country	Estimates of total EU28 share
Spain	22%
Italy	16%
UK	11%
Croatia	11%
France	9%
Greece	8%
Austria	6%
Germany	6%
Portugal	6%
Netherlands	3%

Source: Authors (2017)[6].

This would indicate that the two important tourism components of the West Balkan "funnel" are unlikely to have suffered any serious damage to tourism flows as a result of the events of October 2015-April 2016.

6.3 Economic consequences and factors

The data collected to date may not imply that the tourism economies of the countries in the West Balkan migrant transit route have been affected by the migrant flows; as we have already concluded this has not significantly affected the predicted tourism growth levels in Croatia, Greece and neighbouring countries.

However, there are wider costs to the individual countries macro-economies from having to handle the migrant issue. In the case of Greece for example, utilising information from UNHCR press releases (www.data2.unhcr.org) we would estimate the ongoing cost of maintaining the 41,000 refugees stranded in Greece at around 0.3% of GDP, with an annual cost of around EUR700m, despite the EUR300m Greece received in funding from the EU for the refugee crisis in 2016. However, the problem is not being added to; UNHCR (ibid) indicates that between 01.01.17 and 12.06.17, sea arrivals into Greece only amounted to 8,173 individuals. At the same time, during the period from October 2015-May 2017 6,500 refugees had been resettled in other European Economic Area countries.

At the same time, we have been able to detect indications that Western European tourists are shifting focus towards the Northern Mediterranean regions (e.g. Portugal, Spain, Italy, Croatia, Cyprus, Greece) as well as medium-haul destinations (e.g. Caribbean, Mexico, Florida) from the Southern and Eastern Mediterranean (Morocco, Tunisia, Egypt, Turkey). This appears due to concerns with terrorist attacks, yet over the longer term a rapid decline in tourism inflows into the Maghreb countries and Turkey, is likely to have a significant macro-economic impact on those economies.

The potential for the replacement of Western European tourists is limited. It is likely, we would suggest, to lead to unemployment, lack of investment and infrastructural decay; this in turn could lead to the economic alienation of those individuals whose livelihoods were based on tourism and thus potentially generate a shift towards emigration to Europe (for those able to afford it) or a shift to radical tendencies (for those unable to afford migration). The probability for such a scenario is arguably limited, but it is potentially possible, and it is a situation we should have in mind.

Finally, we should also mention the wider view of what can be described as the future development of the European Union's near-neighbourhood. In the past the EU has devoted significant resources to closer economic relations with the near-neighbours

[3] Authors data (2016) based on national accounts and personal projections.
[4] www.ec.eu/eurostat
[5] Authors data (2016) based on a selection of Eurostat data and personal growth projections
[6] Please note: This information is based on 2015-2016 data, which has been modelled to include potential growth based on preliminary 2016 data. It displays the total percentage of foreign tourists visiting the names country as a share of the EU28 total in inbound tourists, and excludes domestic visitors.

in North Africa, the Eastern Mediterranean, the Caucasus, Belarus and the Ukraine.

Effectively, that long-term policy goal from the 1990's is now in tatters - undermined by a more aggressive stance of Russia in its near-neighbourhood, by ongoing instability in Syria, Egypt, Libya and Tunisia, as well as the continuing problems in Turkey. These issues all have the potential to create further northwards migrant flows and a resulting impact on the economies of those countries affected by such flows.

6.7 Ongoing research

Whilst the findings of this research support the theory that the migration crisis in West Balkans countries and countries connected to the migrant corridor, have so far had impacted marginally on tourism as an economic sector, this view is based on current data.

We are of the view that further data requires to be gathered so that the real and potential medium-to-long term effects of the migration crisis of 2015-2017 may be fully recognised. In addition, we would suggest that future studies should attempt to understand the varying psychological and behavioural effects on tourism destination groups (both domestic and international) in relation to migration flows.

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Processo Editorial / Editorial Process
Editor Chefe/Editor-in-chief: PhD Thiago D. Pimentel (UFJF).
Recebido em 30 de Maio de 2017; aceito em 31 de Agosto de 2017; publicado online em 31 de Outubro de 2017.
Received on May 30, 2017; accepted on August 31, 2017, published online on October 31, 2017.
Artigo original / Original paper. Seção revisada por pares / Double bind review section.