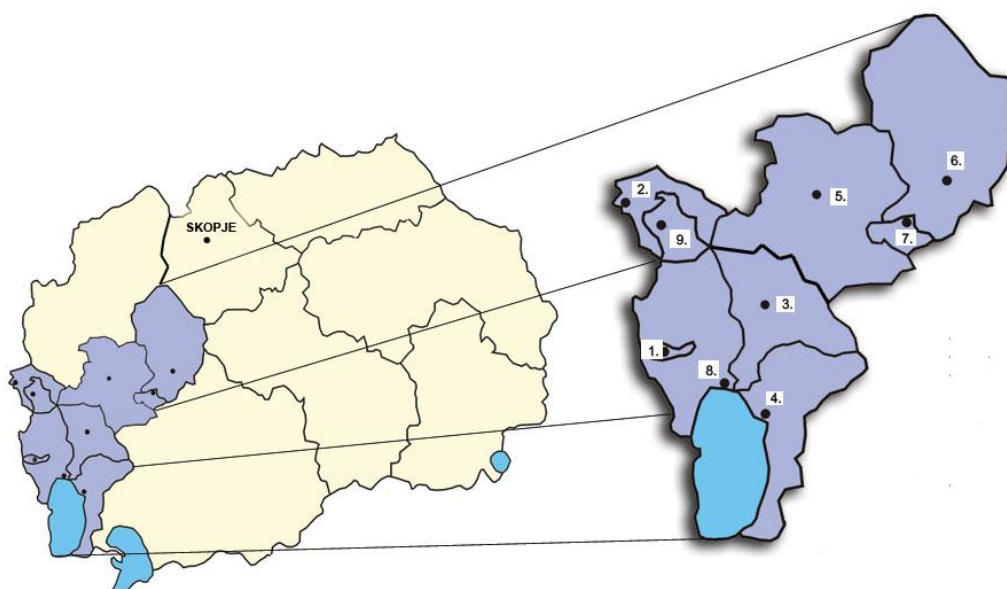


Центар за развој на
Југозападниот плански регион

RESEARCH STUDY OF THE TOURIST POTENTIALS OF SOUTHWESTERN PLAN REGION



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STUDY ON THE TOURISM POTENTIALS IN THE SOUTHWEST PLANNING REGION

ABSTRACT

Tourism in the Southwest Planning Region in the adopted document is identified as one of the leading industries. Given that in a sustained sense it can activate the potentials in a relatively favorable way and accelerate the overall development, it represents a basic interest for the municipalities belonging to the Region and the small local areas. The justified methodological approach allows for determining the potentials in volume, structure and dynamics, the appropriate use of the spatial position, the natural and cultural resources and the mutual relations that occur in this spatial entity. The social conditions represent the framework in which this sector can operate in an optimal way. Special values represent the communication links because their improving is a precondition for organizing the space for tourism purposes, improving the quality of receptive resources, creating tourism products and performing on the tourism market. The development opportunities, on the other hand, are the basis for forecastings, their classifying and adopting action plans. Through the determining the action plans it can be recognized that the achievement of the primary goal throughout the development should increase the share of the Gross domestic product of this sector in the Southwest Planning Region and the Republic of Macedonia.

INTRODUCTION

The Southwest Planning Region in the Republic of Macedonia is one of the most attractive spatial entities. That is due to the attractive properties it has of natural and cultural character, the created infrastructural and super-structural conditions and primarily the positive development policy in terms of balanced tourism development and use of the resources in a selective sense.

In the past there was a tendency to exploit the potentials that the region possesses. It meant that tourism was placed in the priority sectors, but because it is a complex and heterogeneous developmental opportunity they remain only as developmental perspectives. They refer to the tourist valorization of space, improving the communication and accessibility of tourists towards the tourism demand, the development of human potential and paradigmatic increase of the Gross Domestic Product (GDP) in the field of tourism and hospitality in the total GDP of the Southwest Planning Region (SWPR) and in the GDP in the Republic of Macedonia. In this sense the goals should provide insights and in the approaches and improvements in order to reach results that will enable tourism to enhance its position within the economic and social development of the municipalities and the region as a whole, which will contribute to the balanced regional development of the Republic of Macedonia.

The balanced development of tourism in the region includes Analyses that refer to the situations, possibilities and perspectives of the municipalities that are included in this planning spatial entity. This derives from the fact that tourism as a development accelerator does not represent only a benefit in the relations between the development of the other planning regions and the Republic of Macedonia as a whole but also within the region. That means that the inter-regional and the intra-regional relations in the tourism development are crucial for increasing the participation in the GDP in this sector. In this regard, it is important to access with using the development indicators which will be noted in the official documents of the municipalities, the region and the Republic of Macedonia and especially in determining the characteristics of the activity observed in terms of grades given by the stakeholders and experts as well as the scientific community if they have primary research character.

In order to realize the research process, it is necessary to establish argumentative components in the action plan and the strategic documents of the above-mentioned goals. In this sense very important are the priorities, patterns of implementation, time frames and the establishment of vertical and horizontal coordination at all levels. In terms of acceptability of the research results that are included in the study, an important place has the promotion and presentation of the key findings in this planning document with strategic importance for the tourism development.

The balanced development of the regions in the Republic of Macedonia is one of the top priorities of the Government, the local governments and the tourism industry as a whole. The benefits should have general scientific and technical importance. The document is based on a specially designed, theoretical-methodological approach, with a high degree of professional applicability.

I METHODOLOGY FOR PREPARING A STUDY FOR TOURISM POTENTIALS OF THE SOUTHWEST PLANNING REGION

Given that within the tendering documentation it is necessary to prepare a methodology for the Study of tourism potentials of Southwest Planning Region we submit it as a separate document.

During the preparation of the Study for tourism potentials of the Southwest Planning Region the starting point is the set of the long- and short-term goals. The study relies on the research of triple character:

I. Review and critical analysis of the literature, planning documents, strategies and other documents adopted within the Southwest Planning Region, that treat the matter of tourism and hotel - catering potentials and resources in the Southwest Planning Region, the municipalities which it covers and other settlements. In this respect also, screening the adopted documents at the level of the Republic of Macedonia was used, so that we determined the place of the Southwest Planning Region within the Republic of Macedonia regarding the mentioned subject of study.

II. The study is based on secondary research while relevant indicators that are published by the State Statistical Office of the Republic of Macedonia in the field of this activity were used, as well as the indicators contained in the bulletins, reports and other publications on national, regional and local level.

III. Given the fact that it was not possible to obtain relevance only through the secondary research, we considered it necessary to carry out also primary research. The primary research had primarily field character. In that sense we used two research methods including: **interviews** and **surveys**.

The interview was systematized and implemented by the project team group led by the project developer, general researcher and the researchers involved in the research activities as supporters in the preparation of the study, which in fact have extensive experience in this field.

Within the primary research 2 survey questionnaires and 1 standardized interview were prepared. They were also prepared by the expert team. The group carried out training activities for interviewers and prepared the material for the questionnaires. The survey was conducted on a sample of 0.05% in order to ensure the relevance of the data. The sample is standardized according to eminent conducted surveys.

In accordance with the tendering documents we established a long-term goal as well as specific objectives of the project. Based on the determined approaches the expert team outlined the activities related to these objectives

Research techniques

For the purposes of this project generally several research techniques were used such as:

- Survey and interview (two different survey questionnaires and a standardized interview were prepared which were filled by three groups of subjects, including: the sectors of tourism and the responsible institutions of the Southwest Planning Region, tourists and locals). Based on the collected data from the surveys a statistical analysis was conducted using several statistical techniques such as: descriptive analysis, analysis of variance and inter-sectional analysis.
- SWOT – analysis. For the study we used this technique in order to study the aspects that did not have, or the statistical data were not enough as well the surveyed groups of respondents could not provide relevant data.
- Analysis of statistical data. Used were multiple data sources such as the State Statistical Office, the local governments of the municipalities within the Southwest Planning Region, as well as other relevant sources of statistics. Based on the statistics we performed statistical analysis using various techniques such as descriptive analysis, analysis of variance, time series analysis, analysis of indexes and predicting future values.

LONG-TERM GOAL - Increasing the participation of tourism and hotel - catering sector of the Southwest Planning Region in the Gross Domestic product (GDP) of the Republic of Macedonia.

1. Within this goal we predicted two direct actions. The first concerned the analysis of the tourism and hotel - catering sector and GDP of the Republic of Macedonia. This means that it was necessary to collect data and to conduct an analysis of the participation of the tourism and hotel - catering sector in the GDP of Republic of Macedonia, its share in the GDP of the Southwest Planning Region, the share of this sector of the Southwest Planning Region in the Gross Domestic Product of the Republic of Macedonia and the individual participation in this activity by the municipalities in the GDP of the Southwest Planning Region.

2. Based on these indicators, as well as the monitoring and analysis of the other indicators related to the increase of GDP of the Southwest Planning Region in the Republic of Macedonia, we approached towards an approximate projection of the development.

3. The expert team was aware that some indicators could not be obtained, and were relevant for the projecting, so that deficiency was used as a tool for indicating the creation of the necessary actions in the Action Plan.

SPECIFIC GOALS

Within the specific objectives set in the project description, the expert team was working on the following topics:

- Identifying the developmental opportunities of tourism and hotel - catering sector in the Southwest Planning Region as a separate territorial whole
- Optimal utilization of tourism resources in functional balanced development of the Southwest Planning Region.
- The study provided relevant information for planning and implementation of measures and activities that we think will contribute to the optimal development of this activity. That is realized through determining the components contained in the Action Plan for the development of the tourism and hotel - catering sector in this region.

One of the most important techniques that we applied within this research was the SWOT - analysis

A. The Study determines the developmental opportunities of tourism and hotel - catering sector in the Southwest Planning Region, viewed as a territorial whole.

ACTIVITY –determining the volume, structure and dynamics of the tourism and hotel - catering sector in the Southwest Planning Region

As relevant resources and potentials in the development of this sector in the Southwest Planning Region, we assumed that the spatial, natural, anthropogenic and cultural potentials need to be analyzed, but also the social regulation, communication links, receptive potentials and the information infrastructure. For predicting the development, the expert team has approached to the analysis of development indicators whereas special place had the volume, structure and dynamics of the hotel - catering sector.

- As part of the analysis of the regions spaciousness the functionality of the **spatial position** through contact characteristics, transitivity and polyvalence was analyzed. Contact characteristics are important because this is a border region that allows fluctuation of tourist clientele in different ways (religious, ethnic, family, language, etc.). Transitivity as value is very important and little analyzed which enables to recognize contents related to transit tourism. Through polyvalence it is allowed to improve the package tours by combining a variety of features that the Southwest Planning Region has and its surroundings (mountain, spa with coastal tourism).
- Through the analysis of **natural** and **anthropogenic resources** enables locating priority development values and selective forms of tourism that are actually provided in the basics of the project as an integral part of the recommendations of the National Strategy for tourism development in the Republic of Macedonia. This research covers the contents analyzed by the secondary and primary research, so that the determined goal for segmentation of types of tourism is based on the priorities that authorities have as well as the affinities and preferences the service demanders have.
- The **social conditions** for development are analyzed through the prism of adopted documents regulating this matter that enabled the determination of guidelines that will improve the process of involving stakeholders in this sector. This means that in the research we approached to the analysis of normative regulation, strategic documents, instruments for encouraging the development - grants, loans, loans, mutual public - private partnerships, IPA programs and the like, as well as in the perception of the organizational structure in the tourism and hotel - catering sector.
- The expert team considered that the resources can not be used sufficiently if the **communication links** are weak and are not constantly developed and modernized. Therefore, within the preparation of the study, special place found the analysis of the quantitative and qualitative indicators of transport links through types of infrastructure, transport facilities and traffic services
- **Receptive resources** were analyzed by volume, structure and dynamics of *accommodation facilities*. This was intended in order to establish guidelines that ensure dynamic development and greater efficiency in the process of welcoming the tourists. The methodology projected the analysis to refer to the differentiations

according to the official statistics, and in that sense, through the SWOT - approach to determine the components that outlines the strengths, weaknesses, opportunities and threats. This applies to each component separately.

The communal organization and infrastructural equipment means that it is necessary to determine the ways of using the space, maintaining of hygiene and ensuring the vital values such as water supply, electricity, drainage of wastewater, disposal and treatment of solid waste and improving the environmental conditions in the development. These studies were performed using the techniques like analysis of secondary data, interviews and surveys.

Social acceptability of tourists refers to the domicile population and its willingness to accept tourism development initiatives and improving the hotel - catering sector. This research had primary character. In the research this was realized with using a separate questionnaire.

A very important segment of the possibilities for development has the *information infrastructure*. It refers to the opportunities that the region provides as a potential for networking in the information systems and optimal functioning of all segments at a micro and the macro - level. It is especially important to emphasize that information technology enables the promotion of values, identification of resources, facilitating the movements in space and so on. This section specifically explored the needs of tourists in terms of IT infrastructure, as in the manner of the ability to connect, so in terms of obtaining relevant information, access to information, relevance and impact of information as well as the opportunities for future improvements in accordance with the expectations of information infrastructure.

- In order to predict the development of the region it was necessary to collect data and to analyze the **development indicators**. In this sense, the analysis included the attendance, the structure of visitors, stay and consumption, volume and dynamics of the accommodation units, qualitative characteristics of tourism products and the dynamics and structure of employment as well as distributed incomes in tourism. In this research, the quantitative analysis prevailed, and the quality of tourism products was explored through the instrument of interviewing and survey analysis.

B. Optimal utilization of tourism resources in the function of balanced development of the Southwest Planning Region

ACTIVITY – Classifying the resources of the Southwest Planning Region

- The optimal use of resources represents a research that is relevant in terms of promoting this sector. In that context, it was necessary to review the structure, access and methods of the *past managing* the tourism potentials to determine the

opportunities that have positive connotation. From the given research techniques, in this regard, we approached towards the use of the interview and reviewed bibliography.

- We considered that the optimal use of resources will be realized through the *mapping and determining of values*. This research was conducted through the techniques of inventarization and tourist valorization of space, segmented by conditions and identified opportunities.
- In order to evaluate the character of the tourism market and the adaptation of tourism supply towards it, it was necessary to determine the *emmitive tourist zones* of the Southwest Planning Region. The research was conducted by using the technique of analysis of the volume and the structure of the attendance and communication.
- The expert team was aware that *seasonality* is one of the largest problems in the development of tourism in the Southwest Planning Region. Therefore, determining and the analysis of seasonality were crucial. It was necessary to provide measures and activities which, to a certain extent will eliminate seasonality through involving contents in the tourism offer of the region in the off-season period. This was realized through quantitative analysis of tourists' visits per month and interview with experts of the situation about possible ways to improve these processes.
- In order to improve the development of this sector in the Southwest Planning Region important place was given to the *analysis of human resources* through the prism of the state of education, as formal and informal category. Also important was the perception of the structure of unemployment and the possibility of their involvement in the tourism and hotel - catering sector.
- *Intra-regional balanced development* is one of the components in the optimal use of resources. It has polyvalent character within the region. The research team considered that it was necessary to overcome the municipal boundaries in creating the tourism policy and implement intermunicipal cooperation with a high degree of connectivity and compatibility with each other in the creation of tourism products in the region.

C. The study contributes to a more targeted planning and implementation of determined activities and measures

ACTIVITY – Determining an Action Plan

In order to realize this goal it was necessary to have a strategic approach towards planning and implementation of measures and activities. This research resulted in an Action Plan, which contains the components that are relevant to realize this goal.

- It determined the *priorities* that were obtained based on the analysis and primary research.
- For each of the priorities we identified *contents* which mean that the priorities represent specific objectives with operational opportunities for usage.
- In order to implement the priority objectives and contents it was necessary to analyze and to determine *actions that have to be undertaken in order to obtain optimal development of the priority*, or the utilization of potentials.
- For the purpose of taking responsibility for the implementation of development priorities the survey included determining the *carriers* who are responsible for this realization.
- The research team considered that the realization can be optimal if also the *partners* are determined who will contribute substantially to the implementation of the measures and activities.
- *Models for realization* are very important and the research team gave special attention precisely on this segment because it determines the forms and contents that will be in the function of improving the region as a whole as well as the intra-regional relations.
- *The time frame* is a category which is necessary because on the basis of the duration of activities the budget as well as the optimality of the implemented activities will be created
- The *approximate budget* represents a category that defines the implementation of priority activities and that is why it was very important through an analytical approach to determine it.
- The research needed within the specified Action Plan to determine the success indicators which are the result of the realization of the long-term and specific goals, or the increasing of the share of this sector in the GDP and improving the tourism offer of the region, ie the municipalities it encompasses.

The expert team predicted accountability in all phases of the research activities and special promotion of the project not only to the tenderer of the project, but also to the public in forms selected by the tenderer.

In order to realize this project, the project team undertook **activities** outlined in the procedure and these are the following:

1. Forming a team that will work on the Study;
2. Creating a Master Plan of the Study and Methodological approach for its preparation;
3. Field research with Local Economic Development offices and municipalities and data processing in the nine municipalities of the region;
4. Field research in the sector in the whole region with provided minimum of a representative sample;
5. Training of interviewers;
6. Data collection / processing of the data;
7. Preparation of a draft version of the Study;
8. Presentation and extensive consulting on the draft Study;
9. Presentation and approval of the Study by the Council for Development of the Southwest Planning Region;
10. Printing of the Study the Macedonian language;
11. Translation of the Study in English language and its printing;
12. Reports on the progress of the project (on a monthly basis) and a final report.

II DETERMINING THE POTENTIALS, VOLUME, STRUCTURE AND DYNAMICS OF THE TOURISM AND HOTEL - CATERING ACTIVITY IN THE SOUTHWEST PLANNING REGION

Determining the potentials, volume, structure and dynamics of the tourism and hotel - catering activity in the Southwest Planning Region includes several components. These are the spatial situation as a resource on which the tourism value of the other resources is based (accessibility, communication, etc.) and the position itself as a value, regardless of all other relevant developmental elements. The second component relates to the attractiveness of the area as a potential, which is crucial for the development of tourism.

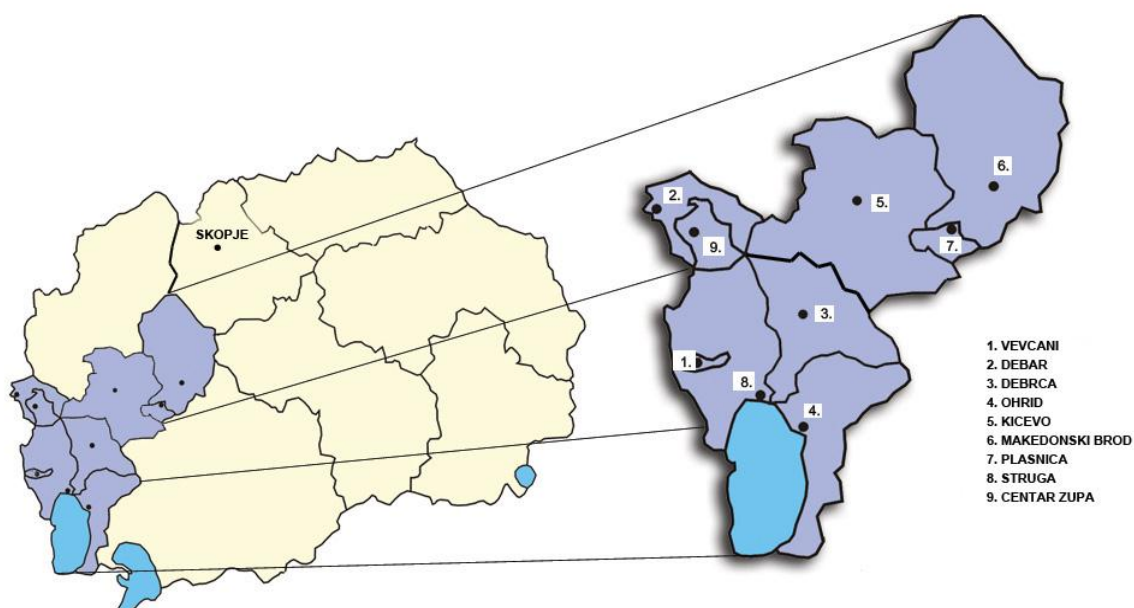
Given that tourism is an organized and regulated activity, a very important component is the social environment through which tourism should be developed in the region.

Situations and possibilities of linking the region with the neighbouring spatial units of domestic and international character represent a clear and unambiguous potential as a resource. Particularly it is important in this regard that the development dimension of tourism can be followed through indicators that are provided with the primary and secondary sources and which have optimal character. Receptivity of space is a structure that defines the basic nature of the included contents in the developmental processes and in that sense is essential in determining the developmental opportunities.

Besides the analyzes that will be related on the potentials for development of tourism given in the relevant literature and the secondary sources of data, it is very important to recognize also the opinion of the stakeholders, especially the representatives of the LED offices, travel agencies and hoteliers.

1. SPATIAL POSITION

The territory of the Southwest Planning Region covers an area of 3,340 km² and in it are included the following municipalities: Vevcani, Debar, Debrca, Ohrid, Kicevo, Makedonski Brod, Plasnica, Struga and Centar Zupa. In the municipalities of this region there exist a total of 286 settlements.



Picture no. 1 – Southwest Planning Region of the Republic of Macedonia

The Southwest Planning Region has transboundary character because in the west it borders with Albania. The borderline in this section starts from the highest peak on Krcin. From Krcin the borderline continues down the west or southwest towards the village of Spas in the Debar valley and emerges to the Black Drim River. The border follows the course of the river to the dam of the artificial lake Spilje. From here it rises to Jablanica Mountain and extends on the highest mountain peaks. Descending to the Ohrid Lake it leads through the border pass Qafa San and on the coast it emerges south of the village of Radozda. The border runs through the lake to the southern coast near the monastery of St. Naum. This border extends through mountainous, river, lake and valley areas. Most of it goes through mountainous space. It stretches on mountain ranges, so in these parts it is hardly penetrable. The patency is suitable through the mountain passes, lake basins and the valley of the Black Drim River. This extension of the border has significant tourism importance because the heterogeneous structure of the border area allows cross-border cooperation on different grounds. Of particular importance is the openness and functionality of this border. The border with Albania is open and there operate three border crossings:

- Blato;
- Qafa San;
- St. Naum.

The border crossing Blato is located near Debar. This passage controls the supply of goods, travelers and tourists through Debar and Blato. This is an opportunity visitors from Peshkopeja and northern parts of Albania or from Tirana to visit the Southwest Planning Region, and the openness towards the Adriatic coast makes it possible combined trips to be realized.

The border crossing Qafa San is the most important and busiest crossing towards Albania. It is situated near Struga. Through the passage lead communications from Albania. It can be said that there exists openness towards Elbasan, Tirana and the port of Durres on the Adriatic Sea, as well as towards Pogradec and Korca from where tourists can be expected. Through this passage an opportunity for visiting the west coast of Lake Ohrid is given.

The border crossing St. Naum is located near the village Ljubanista or the monastery complex of St. Naum. It is located in the direction which from Ohrid leads towards Pogradec and Korca. Its tourist importance is contained in the possibility to visit the eastern coast of the Ohrid Lake by travelers moving in this direction.

The border crossings into Albania control only the road traffic. These two countries are not connected by rail.

The Southwest Planning Region has its own airport. That is the Ohrid airport "St. Apostle Paul". Over this airport the domestic and international air traffic takes place. Given that in this airport a passport and customs checkpoint exists where international air traffic is being controlled, it also represents an extraterritorial border crossing, through which in the Southwest Planning Region and the Republic of Macedonia passengers and goods are entering and exiting.

The Ohrid airport - "St. Apostle Paul" is located in the surroundings of the villages of Podmolje and Orovnik, at a distance of about 10 kilometers from Ohrid and Struga. Given that in the near vicinity of the airport the cities of Debar, Kicevo, Resen and Bitola are located, the Southwest Planning Region of the Republic gravitates towards this airport. Its value is underlined by the fact that in this part of Macedonia are also located the most important tourism areas, so that the airport is in direct function of tourism development. The total turnover of the Ohrid airport is estimated to participate with 5.5 % of the total air traffic of passenger in the republic.

The convenience of the tourist - geographical position of the Southwest Planning Region is mostly emphasized towards Albania. Furthermore, the position towards the competitive countries is very important. As such they can be considered as countries that are near the Southwest Planning region, and these are the countries of the Balkan Peninsula.

Accordingly, the competitiveness in a broader sense as well as the competitiveness in a narrower sense can be mentioned. Competitiveness in a broader sense refers to the Southwest Planning Region in the World and European market, while the competitiveness in a narrower sense is the relationship towards tourism regions in the immediate vicinity, and these primarily are the Balkan regions.

1.1. FUNCTIONAL FEATURES OF THE TOURIST POSITION OF MACEDONIA

The Southwest Planning Region represents a region that has emphasized functional features of its tourist - geographical position. As functional characteristics of the tourist - geographical position the **transitivity**, **contact characteristics** and **polyvalence** should be highlighted. These features arise from the fact that the Southwest Planning Region is not isolated territorial entity, but on the contrary, it is characterized by complexity, both in terms of its transition and communication, and in terms of the environment, the diversity and abundance of tourist values that it has.

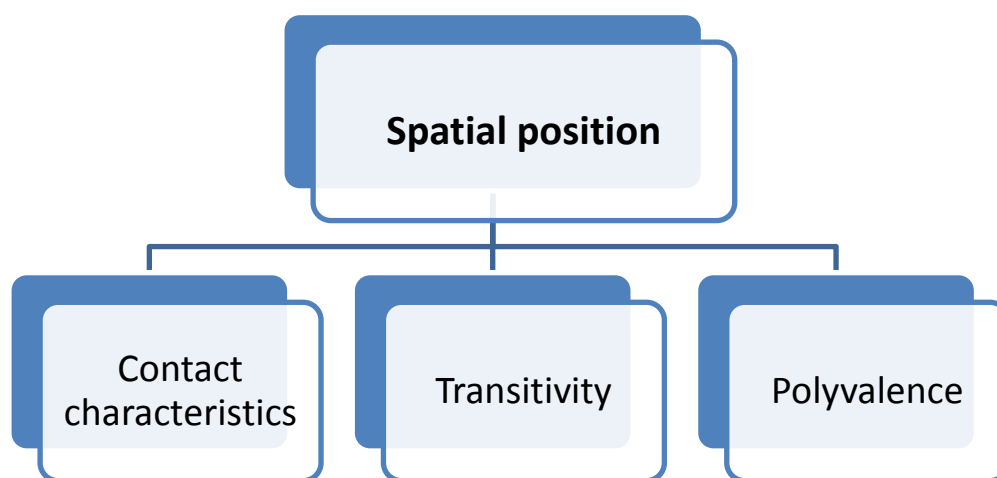


Chart no. 1 – Spatial position

1.1.1. TRANSITIVITY OF THE TOURISM SPACE

Through this region some significant roads are passing. Among the most important transit routes from the Western tourist route and the direction from east to west can be differentiated.

The transit direction of the southwestern tourist transit route allows openness of the region to the main traffic knot of Macedonia, the capital Skopje, through the region towards the Adriatic coast and Italy. This is very important for tourism because the connecting of Bulgaria via this route will enable significant transitivity of the region.

The east - west transit direction leads through the Pelagonia region and allows connecting the Eastern European and Asian countries, with the Adriatic coast and further, through Italy with Southwest Europe. The importance of this transit route will largely depend on the degree of development of spatial units that are located on it.

The lack of infrastructural quality, as well as the lack of communicative organization in general, represents a limiting factor in the development of transit tourism of this route. The resolution of this problem will allow more circulation of goods and passengers, which will reflect on tourism in the Southwest Planning Region.

Transitivity of the position of the Southwest Planning Region reflects also on the domestic tourism turnover. The movements of tourists from their places of residence, to the destination can be considered as regional and local. The regional tourist movements take place from the urban centers to the mountain, lake and spa destinations. The general dispersion centers in the country are: Skopje – as the most populous city, then Bitola, Stip, Veles, Kumanovo, Tetovo and others. That means that this in this region present are a number of movement directions. They provide that some places and sites, despite the scarcity in the attractive – motivational fund, to be visited by tourists. A typical example is Kicevo - located on the directions between the dispersion centers of the Southwest Planning Region.

1.1.2. CONTACT CHARACTERISTICS OF THE TOURISM SPACE

The contact characteristics of the tourism position consist, above all, of its position in the Balkan Peninsula and its neighbouring regions that surround it. Hence the attitude towards the openness of the Republic of Macedonia, and thus the Southwest Planning Region to the neighbours and even to other states and nations there is no alternative in terms of stimulating the contact characteristics of the tourism - geographical position. The large number of ethnic and cultural collectivities in its immediate surroundings increases the interest in visiting this region, because numerous ethnic, cultural and social values are present in it.

Therefore many Macedonians and Albanians that are living in Albania gravitate towards the Republic of Macedonia. They often are family and are socially related, which is one of the potentials for visiting the Southwest Planning Region.

1.1.3. POLYVALENCE OF THE TOURISM SPACE

The Southwest Planning Region is characterized with an emphasized polyvalence of the tourism - geographical position. The intertwining of natural and cultural forms and their mutual interdependence enables a quality content of the tourists' stay. The natural values have emphasized recreational, curiosity and aesthetic features. This wealth is complemented by renowned and aesthetic features of the cultural elements that often dominate in this space.

Tourism significance of polyvalence is contained in the possibility of creating combined package tours with contents that the region abundantly possesses with potentials that are present in other regions of the country and abroad. A typical example is the polyvalence contained in creating coastal and lake tours, or the creation of international tours of the Antiquity, the Middle Ages, and so on.

SWOT – ANALYSIS OF THE SPATIAL POSITION

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Accessibility of tourists from the Republic of Albania and Greece towards the region and the existence of an international airport	Administrative separation of the space	Development of the EU integration process	Unimplemented processes for moving towards EU and the Euro-Atlantic integrations (Isolation of the space)
Transitivity on the Corridor 8	Peripheral position in the Republic of Macedonia	Development of Euro-Atlantic processes	Failing to realize the outlined plans and strategies regarding transitivity and polyvalence of the region
Creating international agreements and exchange of experiences	Customs control of the movement of passengers and tourists	Free capital flows	Inter-ethnic and inter-religious challenges
	Unfinished construction of the Corridor 8	Visa liberalization	
	Weak connection by sea	Joint tourist offer with neighbouring regions	

2. NATURAL TOURISM ATTRACTIVE - MOTIVATIONAL RESOURCES

The natural tourist attractive-motivational resources in the Southwest Planning Region are highly represented. This wealth of natural tourist values is an important indicator of tourism opportunities in this geographic area.

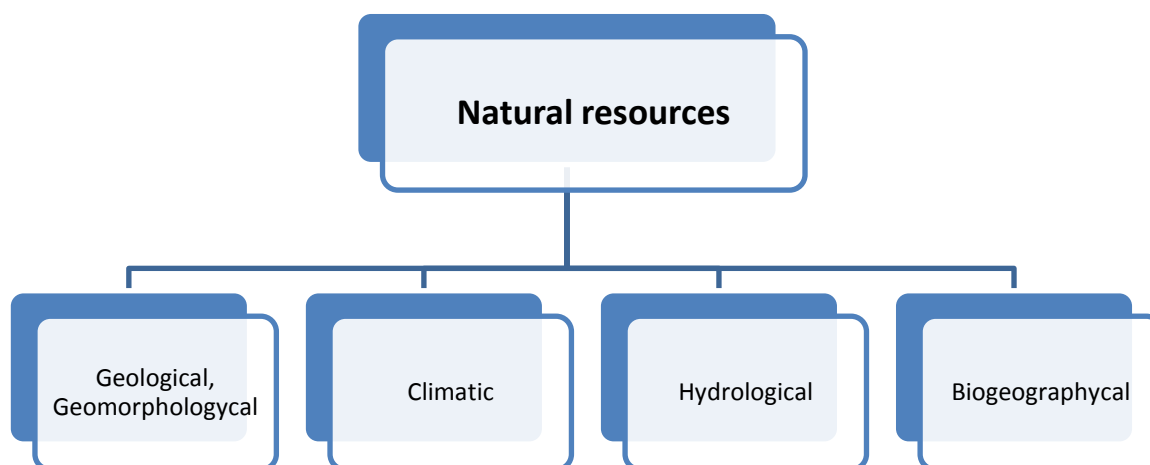


Chart no. 2 – Natural resources

For the tourism development of the Southwest Planning Region special place have the following natural attractive - motivational factors:

- Geomorphological;
- Climatic;
- Hydrographic and hydrological and
- Bio-geographical.

2.1. GEOMORPHOLOGICAL TOURIST VALUES

The Southwest Planning Region is characterized by expressed wealth of tourism geomorphological values. This wealth is reflected as represented by the number of forms, as well as in their heterogeneity. Under the influence of endogenous and exogenous forces

in the Southwest Planning Region very interesting relief forms have been created that attract tourists. Tectonic processes and erosion - accumulative phenomena of the geological history conditioned the wealth of underground and surface forms, which with their attractive effect retain the attention of tourists, or represent a significant tourist potential on the other hand.

The following *surface relief forms* have a special place in tourism in the region:

- mountains;
- mountain passes;
- gorges and canyons;
- post-volcanic forms;

Of the *underground relief forms*, as a tourist value can be considered the caves.

2.1.1. SURFACE RELIEF FORMS IN THE SOUTHWEST PLANNING REGION

Mountains in the Southwest Planning Region are complex tourist - motivational attractiveness. This value has double expression. From one side it represents an attraction by itself, with its features that it owns, and on the other hand it acts on other elements in the geographical environment, such as climate, hydrography as well as the flora and fauna.

The Southwest Planning Region is a largely **mountainous region**. In the Southwest Planning Region there are low, medium and high mountains. Dominant mountain forms, according to their uniqueness and importance for the development of tourism, are the *high mountains*. The highest mountains are: Stogovo (Bik Doruk 2.268 m) Galichica (Magaro 2.054 m), Jablanica (Crn Vrv 2.257 m). The relatively high altitude and suitable mountain sides express potentials for ski trails. The most suitable terrains are the slopes of the peaks Magaro and Crn Vrv.

In the second group of mountains in the Southwest Planning Region are the *medium high mountains*. Their height ranges from 1.000 to 2.000 meters above sea level. Among them, the most important are: Plakjenska Mountain (Stolev Plake 1.998 m) Ilinska Mountain (Liska 1.907 m). This group of mountains offers various opportunities for tourism development as well. Many of them have conditions for development of winter – sports activities. Furthermore, these mountains have opportunities for developing summer hiking activities and establishing optimal viewpoints.

Besides these centers, at most mountains there are sites that are of lesser importance and attractiveness as a motivational attractiveness, and in this sense, are complementary. On

some of them cable cars were built, such as in Vishni on Jablanica Mountain or Tomoros on Galicica.

The landscape in the Southwest Planning Region is very diverse. Mountainous areas are permeated with valleys. Valleys are interconnected with mountain *passes*. Between the Prespa and Ohrid valley the mountain pass Bukovo is located (1.180 m), between Ohrid and the Kicevo valley located is Preseka (1.150 m). These mountain passes allow passage through the high mountains and their connection with other mountain and valley areas. From a tourist point of view, mountain passes do not only have communicative value, as a natural predisposition for this purpose, but are also suitable for locating of service tourist - catering facilities. Unfortunately these benefits are still not activated and there is no such usage of the tourism potentials.

In the Southwest Planning Region there exist gorges that have significant tourist importance. Among them the most important are the gorges on the rivers Black Drim and Treska. Their significance is communicative, because through them run roads, they are aesthetic decorative, attractive because of their setting and impressiveness.

Post-volcanic forms are evidence for the still present geological seismic activity in the Southwest Planning Region. Besides the thermo-mineral springs, the most attractive is the asctive post-volcanic form. Active post-volcanic form, in the form of solfatara and mofette occurs near the village of Kosel, near to Ohrid. The mofette consists of a miniature crater which diameter is 0.5 meters, with a depth of 30 centimeters. Although this is not an affirmed tourist motive as part of the tourist offer, in this area it is an important complementary potential. However, this potential has not been sufficiently exploited to improve the tourism offer in the Southwest Planning Region.

2.1.2. CAVES AS TOURIST VALUE IN THE SOUTHWEST PLANNING REGION

The Southwest Planning Region is an area in which geological composition dolomite and limestone occur. On this basis, developed are the karst forms. Among the karst forms attractive are the caves. The attractiveness of the caves is contained in their curiosity and aesthetic properties.

Taking into account the classification of caves according to their value on the territory of the Southwest Planning Region there exist caves with the character of natural rarities, especially significant, significant and remarkable caves.

As a cave that can be marked with the highest level of possible tourism potential cave is Slatinski Izvor which is ranked as a cave with the character of natural rarity. This cave is located in the Slatinska River valley - Porechje, near its mouth on the river Treska. The

investigated length of the cave is 800 meters, of which 705 meters belong to the main channel. In the main channel there exist cave pillars and stalactites, and the largest cave room (20 x 15 m) as well as larger stalagmites. In the cave an underground river runs, with a length of 557 meters. There are also small travertine ponds, in which the presence of cave shrimp is found.

In the group of particularly significant caves the cave Jaorec in the village Velmej, Debrca valley, can be included, which total length is 76 meters. In its pleistocene strata are found the remains of a bear. The tourism value of this cave is contained in the relatively good accessibility, patency and paleontological features. However, this cave is also not valorized enough in tourism terms.

The number of *significant* caves in the Southwest Planning Region is relatively large. Such character have:

- Simka, a cave near the mouth of the Haji River in the river Radika, in the canyon area known as Torbeshki Most;
- Samotska Dupka, on the mountain Galichica, on the right side of the karst valley Studino;
- Vevcani springs, in the near vicinity of the village Vevcani;
- Peshna, on the right side of the valley on the river Treska, in the Porechje basin.

In the group of *remarkable caves* the following can be mentioned:

- Slatinska Cave, located on the left side of the valley of Slatina River, under the village with the same name in the Porechje region;
- Orle, near the village of Gorna Belica in Porechje.

The Analyses that we have done show that the most suitable opportunities for involvement in tourism activity has the cave Slatinski Izvor, which belongs to the group of natural rarities and which in this context has the best opportunities for traffic connections.

2.2. CLIMATIC TOURISM VALUES OF THE SOUTHWEST PLANNING REGION

The climate in the Southwest Planning Region is a very important factor in tourism development. It appears as one of the most dominant attractive-motivational factors in this geographical area. Meeting the recreational tourism needs is directly related to the climatic characteristics of the Southwest Region.

Also, the climate and weather conditions are factors that affect the general tourist mobility of the population. That means that this tourism value reflects on the seasonal characteristics of the tourism trade in the Southwest Planning Region, not only in the recreational types of tourism, but also in the tourism forms with a pronounced cultural component.

The climatic characteristics do not act isolated. As a significant tourist value should be pointed out its effect on the other elements of the geographical environment. On one hand, climate modifies and so they get established in their value. On the other hand, only in the complex climate benefits a large number of elements of the geographical environment of the Southwest Planning Region have tourism - motivational value.

For the development of tourism in the Southwest Planning Region of significant influence are as the general climate characteristics, so the values of specific climatic elements. Some climatic elements have tourist value for certain types of tourism, while others are fundamental. For example, the amount of snow is the basis of tourism development in the mountainous centers of the Southwest Planning Region, and has no effect on other types of tourism.

Global climate features as well as the characteristics of the climate elements depend on various factors that act in this area. Thus, with the studies the climatic factors, as well as the climatic elements of the Southwest Planning Region should be included.

2.2.1. FACTORS OF THE CLIMATE IN THE SOUTHWEST PLANNING REGION

On the climate in the Southwest Planning Region are influencing numerous factors. Among them special place have: the geographical location, landscape features, altitude, relation of the cyclone and anticyclone centers and water reservoirs.

In terms of the *geographic location*, although the Republic of Macedonia, and thus the Southwest Planning Region is landlocked, the proximity of the Aegean and Adriatic Sea has significant Mediterranean impact on modifying a moderate - continental climate. That catalyzes the extreme values of the continental climate elements, which positively influence the tourist stay.

Within the *landscape features*, the mountain chains in the western part of the territory of this geographical environment reduce the impact of the mediterranean climate of the Adriatic Sea area, which can be assessed as a negative factor. However, the river Black Drim and the mountain passes of the mountains Jablanica and Mokra allow for maritime mediterranean influences to be felt in the area of the Ohrid - Struga valley and the river

Black Drim. This reflects very positively on the climatic conditions of this area, which highlights its tourism value.

Altitude is an important factor of the climate in the Southwest Planning Region, because the region is a typical mountainous region with relatively high peaks. It not only affects certain climatic features, but represents a factor, for in this space to define a special type of climate, which is largely defined as typical mountain climate. In tourism terms the mountainous climate is the basis for development of winter - sport activities and staying at such high altitudes.

Larger water reservoirs occur as climate modifiers. Their impact is dependent on the volume it encompasses. The most significant climate impact that has microclimatic influence and which is in the function of the tourism development is the aquatorium of the Ohrid Lake. Due to the temperature - accumulative characteristics, the Ohrid Lake decreases the temperature for about 2-3 °C in the winter and summer months of the year.

2.2.2. CLIMATIC ELEMENTS AS TOURISM VALUE IN THE SOUTHWEST PLANNING REGION

Climate elements outline the climate in the Southwest Planning Region and in this context represents an important tourism value. However, climatic elements in tourism appear as a value in itself. Some values of the climatic elements have positive influence on tourism development and tourism activities, while others have a negative impact. Their tourism value should also be observed depending on the type of tourism and tourism activity. For certain types of tourism, some climatic elements have greater importance in terms of their relevance to other types of tourism. On these features should be paid special attention.

The air temperature, precipitation, duration of insolation, cloudiness, humidity and winds are climatic elements which in the area of the Southwest Planning Region emerge as significant tourist values.

2.2.2.1. Air temperature

Tourism in the Southwest Planning Region is considered with significant seasonal concentration of visitors; therefore in that direction the opportunities for tourist activity in this area must be established.

The average annual and monthly temperatures are given in the following table:

Table no. 1 – Overview of the air temperature in certain cities in the SWPR

Measurement point	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	Year
Debar	0.7	3.0	6.3	11.0	15.8	19.6	22.2	22.0	18.0	12.6	7.5	2.7	11.8
Ohrid	1.7	3.1	5.6	9.8	14.4	18.4	20.8	20.7	16.9	11.8	7.7	3.8	11.2
Kicevo	-0.1	2.4	5.8	10.3	14.9	18.6	20.6	20.3	16.4	11.2	6.7	2.1	10.8
M. Brod	0.4	2.7	5.7	10.1	14.8	18.1	20.2	20.0	16.2	11.1	6.8	2.1	10.7

These features reflect positively on tourism development and tourists' visits.

The average monthly temperatures are highest in the summer months. In most measurement points in the months of July and August, the average monthly temperature is above 20°C. This means that there are opportunities for optimal development of tourism activities.

In the summer months, in the period from June to September, the average monthly temperatures allow for performing swimming and sunbathing activities at the lake tourism localities of Ohrid Lake, Debar Lake, Lake Globochica and Kozjak.

The average monthly temperatures in the summer months are moderate also in the mountainous areas. That means that there exist excellent conditions for walks in the mountain tourism localities during the summer period.

The average monthly temperatures in the winter part of the year are also moderate, both in the valleys and mountains. Thus, the average monthly temperatures between December and February, show negative values only in the high mountains. But also on the mountains these values are bearable because they measure around 0°C. This positively reflects on the possibilities for winter - sport activities in the mountains of Southwest Planning Region

2.2.2.2. *Precipitation*

Precipitation represents a climatic element that has a significant impact on tourism in a particular geographic area. Its relative absence is a positive value for performing sunbathing or swimming activities. But that is only one aspect in the treatment of this value.

On the other hand, the absence of rainfall, in absolute terms, has negative effects on the remaining elements of the geographical environment. Without rainfalls the region would, a

priori, have desert characteristics. Therefore, in this sense, the moderate precipitation should have significant tourism meaning.

Of great importance is the occurrence of snowfalls, as the basic condition for creating snowy sheets that provide opportunities for development of winter - sports tourism activities. Therefore, the amount of precipitation, considered as a tourism value, should be analyzed on the basis of the activities that can take place in the geographical environment, mainly determined by the criterion of seasonality.

The amount of precipitation in the Southwest Planning Region is given in the following table:

Table no. 4 – Overview of the amount of precipitation in some cities SWPR

Point	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	Year
Debar	87.6	83.2	73.8	73.2	73.8	41.6	34.7	37.4	60.7	79.7	117.9	107.6	872.2
Kicevo	71.6	73.2	73.2	55.7	68.1	46.1	36.2	37.2	48.7	76.1	107.1	85.6	786.7
M. Brod	72.9	71.3	65.4	54.1	74.5	48.8	28.8	34.6	48.2	70.7	88.6	77.2	735.1
Ohrid	76.4	72.6	59.8	50.3	63.7	36.4	23.2	21.1	47.4	71.9	98.4	78.9	708.3

In the mountainous areas the annual amount of precipitation is significantly higher. These characteristics of the rainfalls have positive impact on tourism development, as in the mountains, so in the valleys of the Southwest Planning Region.

The average monthly amount of precipitation in the region shows that the greatest amount occurs in late autumn, winter and spring. This characteristic is present in almost all measurement points in the Southwest Planning Region. For example, in Ohrid the highest rainfall occurs between November to February.

This layout of precipitation has very favourable effects on tourism activity, as during the summer tourist season, so during the winter tourist season. In the coastal areas, the absence of rainfall during the summer months reflects positively on swimming and sunbathing activities. In the mountainous area, the occurrence of rainfall determines the skiing season.

If the average number of monthly precipitation will be analyzed it can be seen that it is the lowest in the summer months, which speaks for an outstanding tourism convenience. For example, in Ohrid in the months of July and August, the average monthly number of rainy days measures 10.9, and in the four-month period from June to September it is 27.2 days. This indicates that precipitation is rare during the swimming season, or more than three months there are no rainfalls.

Precipitation in the mountainous areas provides a long-term presence of snow. In summer the number of days with rainfall significantly reduces.

Such characteristics show favourable opportunities for tourism development in the Southwest Planning Region

2.2.2.3. Duration of insolation

Insolation or the duration of sunshine is such a climate element, which affects many recreational tourism activities. Among the activities that directly depend on this climatic element, a special place has the activity for sunbathing, whether it is an activity that takes place on the mountains, valleys or coastal areas.

The duration of sunshine, as a tourist value affects on the swimming activities, on hiking and other outdoor activities. It is quite clear that the sunshine positively affects the elements that the tourism - geographical area owns and in this context, and on the tourist visit as well.

Spatial units, in which the duration of sunshine is over 2.000 hours per year, are considered highly suitable areas for tourism development.

The average annual and monthly duration of sunshine are given in the following table:

Table no. 2 – Overview on the duration of the sunshine in several cities in the SWPR

Measurement point	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	Год
Ohrid	80	101	160	174	240	279	308	288	217	171	118	99	2.233
Debar*	85	90	124	154	213	250	313	288	223	181	109	99	2.129
Kicevo*	88	108	131	158	190	237	300	288	219	160	100	85	2.064

The average monthly duration of sunshine is longer than in the summer months. In all location of measurement the highest values are in the summer months, i.e. the period from June to September, in which the length of insolation is more than 250 hours.

A relatively long duration has the sunshine in the summer months also in the mountains.

The duration of sunshine has suitable characteristics for tourism activities in the winter months of the year. Insolation has especially important values in the mountains. There, the snow sheet and sun allow for conducting activities of sunbathing also in the winter of the year, which can be combined with winter – sports activities.

Although the duration of sunshine in the winter months in other tourist sites is somewhat shorter, the value of about 100 hours monthly however, represent a benefit that provides a pleasant stay in this part of the year.

2.2.2.4. Humidity

The relative air humidity is such a climate element, which expresses the degree of saturation of air with water vapour. As the most important tourism health - recreational value is considered the relative humidity which contains values from 60 to 70%

The average monthly and annual relative humidity is given in the following table:

Table no. 3 – Overview of humidity in some cities of the SWPR

Measurement point	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	Год
Kicevo	87	81	74	68	69	67	63	64	71	76	81	86	74
Debar	83	82	76	70	69	69	67	66	71	76	80	84	74
Ohrid	79	76	72	69	69	66	60	60	66	72	78	79	71

Humidity in the summer months is lower than the humidity in the rest of the year, especially in winter. In summer it has a value of 60 to 71%, but in average the monthly relative humidity is around 65%, which should also be perceived as a favorable tourism characteristic of this space.

Especially it should be noted that in the summer period the average monthly humidity in the Ohrid valley, which is also mostly visited by tourists in this part of the year, measures around 60%, which can be defined as an excellent tourism value.

In the mountainous regions the average monthly values of relative humidity in the summer period suggest favourable characteristics of the tourism activities.

In the winter part of the year the humidity has the highest values. But these values are not high to that extent to be able to interfere with tourism activities.

Relative moderate values of humidity can be also seen in the valley areas, suggesting the benefits of a dual season.

2.2.2.5. *Winds*

Winds are such climatic elements that affect the general climatic conditions. They represent the movement of air, and are conditioned by the difference in air pressure. Their direction of movement is from the areas with high air pressure to the areas with low air pressure. Thus they appear as catalysts of the climate conditions.

Also, the winds appear as factors for air purification in the geographical environment, therefore in the tourism destinations they act as positive circumstances.

Winds may be different in their intensity. The most valuable climatic elements for performing tourism activities are considered to be the winds with lower intensity. Besides of purifying the air, in the summer months they help to lower the air temperature, which very positively reflects on tourists' residence. That can be considered as a significant value in recreational terms.

In the mountain areas the warm air circulation can negatively reflect on the amount of snow. However, the total effect of the influence of warm winds positively reflects on tourism activities performance.

In the Southwest Planning Region numerous local winds appear as well, which are part of the meso-climatic features of these spatial units. These winds occur because of the difference in air pressure and the thermal conditions of the mountains and surrounding valleys, as well as the lake water basins and shorelines. Local winds have "circadian period of duration". During the day they are blowing from the valleys to the mountain peaks, or from the lakes to the mainland, and at night they have reverse direction. These are the winds Denik and Noknik, or Gornik. From the winds that have significant impact on tourism activities important to mention are: Strmec, Veternik, Belichki and Sever in the Ohrid valley.

Strmec is a wind that blows in the summer months from the west and southwest in the Ohrid valley. It starts in the afternoon and ends before midnight. This wind has very favorable effects on the tourists' stay. Its activity in the evening reduces the air temperature and acts very refreshing in this geographical area. Therefore the evenings in the Ohrid valley are very pleasant for walking and relaxation. Its tourism value should also be emphasized in terms of the extraordinary impact on the pleasant nights near the shoreline of the Ohrid Lake, which means having a peaceful sleep.

The wind Veternik has similar characteristics, which circulates from the lake towards the mountains Jablanica and Galicica, like the wind Belichki, which blows from the mountain Galicica towards the village of Peshtani and the Albanian mountains.

The wind Sever is blowing during the winter. It blows in the direction from Struga to St. Naum and can be outlined as an unfavourable wind in tourism terms. Its activity decreases the temperatures, which is relatively low in this period anyway.

Based on the above stated characteristics it can be concluded that the global climate characteristics and climate elements represent significant tourism values on the territory of the Southwest Planning Region. They positively reflect on tourism development and are one of the dominant attractive - motivational factors in this region.

2.3. HYDROGRAPHICAL AND HYDROLOGICAL TOURISM VALUES IN THE SOUTHWEST PLANNING REGION

In the Southwest Planning Region as attractive - motivational tourism values the following hydrographic forms occur:

- lakes;
- rivers;
- thermo-mineral waters.

2.3.1. LAKES AS A TOURISM VALUE

The Southwest Planning Region of the Republic of Macedonia is characterized by the fact that it possesses significant lake potentials. Within this spatial unit exist natural lakes of tectonic and glacial character as well as artificial lakes.

The most significant lake for its tourism potential is the Ohrid Lake. This lake is situated in the southwestern part of the Republic of Macedonia. It encompasses a part of the Ohrid - Struga valley, around which the mountain chains of Mokra, Jablanica, Karaorman, Ilinska and Plakjenska Mountain, Petrino and Galicica extend. It is located at an altitude of 695 meters above sea level.

The total area of the Ohrid Lake measures 348.8 km², of which 229.9 km² belongs to the Republic of Macedonia and 118.9 km² to the Republic of Albania. The data about its surface indicates that this is a relatively large area, which represents a great convenience for tourism development. The total length of the coastline is 86.1 km, from which 23 km belongs to the low coastline, and 63.1 km to the steep coastline. The beaches are sandy,

which provides excellent conditions for swimming activities, sunbathing, sports, recreation activities, and so on.

The aquatorium covers a volume of 54.280 km³, which represents a tourist value in itself, but it is also a factor that affects on the other elements of the geographical environment, such as climate and biodiversity features.

Ohrid Lake is the deepest tectonic lake of the Balkan Peninsula. In the scientific literature there are found several values for the maximum depth. The commonly used data of that depth is 286 meters. In any case, this given data is used in tourism as a characteristic of curiosity of the Ohrid Lake as a tourism - motivational attraction and as such should be pointed out to the tourists.

The average depth of the lake measures 144.80 meters. This means that it represents a lake, despite swimming conditions has also such for development of underwater activities.

Ohrid Lake is subjected to water level fluctuation. In May it usually measures 71 cm., and in October 38 cm. The amplitude of water level is 33 cm., or an average annual water level is 55,2 cm. This variation of the water level is not an obstacle to tourism development because it does not affect the location of accommodation facilities, nor the size of the beaches.

The water temperature of the Ohrid Lake is one of the most important hydrological tourism values. This can be concluded from the table:

Table no. 4 – Overview of the average monthly and annual temperature of the lake

I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	Год.
7,0	6,3	7,0	9,6	13,7	18,6	21,3	22,5	19,8	15,9	12,3	9,0	13,6

The table overview shows that the water in the lake has very suitable temperature characteristics. This lake does not freeze, and the average monthly lowest temperature is 6,3°C. This means that in winter the water temperature is quite high. The average value of the water temperature is 13,6°C, which is also an indicator for the suitable hydrological temperature conditions for tourism development.

Specific tourism value is the average monthly temperature characteristics in the summer months. They, from June to September, exceed 18°C. Such average monthly temperature indicates the optimal opportunities for swimming activities, which, in the Ohrid Lake are performed for at least four months. Namely, the average monthly temperature of the water

measures 18,6°C in June, 21,3°C in July, 22,5°C in August and in September 19,8°C. These are at the same time the months that are best suited for conducting swimming activities.

It should also be mentioned the fact that fluctuations in water temperatures of the Ohrid Lake, during the day, is negligible and is around 5°C. This fluctuation positively reflects on swimming activities that can last almost all day long

Transparency of the water of the Ohrid Lake represents a recreational and aesthetic tourism value. Transparency is related to the amount of suspended particles and dissolved materials. In this case, the small amount of dissolved materials and suspended particles, as well as the flow of clear spring water and high insolation, are the basic factors for the emphasized water transparency.

The greatest value of the water transparency of the Ohrid Lake measures 21.5 feet. This value indicates that the Ohrid Lake is one of the world's most transparent lakes.

Transparency in the recreational sense, represents a convenience that is contained in the purity of water. Transparency in the aesthetic sense, is related to the beauty that clear water contains.

It should be concluded that the development of economic activities and the increase of the demographic population, are the major factors that threaten the indigenous purity of the Ohrid Lake. To avoid this phenomenon, around the Ohrid Lake a system for protection of wastewater was built. In this way the lake will greatly be preserved, which, due to its global values it owns, is listed on the UNESCO list of natural rarities.

The colour of the water of the Ohrid Lake is nuanced olive - greenish to sky blue. Because of these colours, in an aesthetic sense, are the most attractive colours. On the coastline the color is olive - greenish and greenish, and towards the lake openness it is sky blue, which means that the colour depends on the depth and composition of the lake bed. It also depends on the sun, or the degree of cloudiness.

The chemical composition of water is an important tourism value. In this case it is fresh water, without a high amount of dissolved salts. The total amount of dissolved salts is 128 mg/l, which according to the dissolved salts, can be put among the poorest lakes in Europe.

Glacial lakes represent rarenesses in the geographic space, because their genesis is related to specific morphological and climatogenic conditions. Therefore one of the most important properties of the glacial lakes is their curiosity characteristic, as a tourism – motivational attractiveness.

On Jablanica Mountain, under the highest peak Crn Kamen (2.259 m) and the peak Strizhak (2.134 m) the following glacial lakes are located: Podgorecko, Vevcansko, Gorno and Dolno Labunisko Lake.

Podgorechko Lake is located at an altitude of 1.893 meters. This is the largest lake in Jablanica. Its surface area measures 3,999 square meters. The maximum depth is 3.9 meters.

Vevcani Lake is located at an altitude of 1.963 meters and has a surface area of 81 square meters. Its depth is 3.95 meters.

Labunisko Lake is significantly smaller. One of them is totally devastated.

These lakes in tourism terms are quite attractive. However, no roads have been which would affect the improvement of the communication.

Glacial lakes can also be found on the mountain Stogovo. These are Gorno Lake, which is located on the north side of this mountain. The approach to the surrounding space is easy, while the arriving to the lake itself is possible with horse trails. The highest length measures 31 meters, and the highest width is 12 meters. The length of the highly branched shoreline is 120 meters. Its surface area measures 372 square meters. The maximum depth is 0,9 meters. The water is bluish or blue - greenish.

Dolno or Black Lake is situated around fifty meters northeast of the Gorno Lake. Its greatest length is 18, and 7.2 meters it is wide. The maximum depth is 1.5 meters. The surface of the lake is around 130 square meters, and the length of the shore is 42 meters. The color of the lake is dark to black. This color comes from black bed and peatbog.

Given these circumstances, in an attractive - motivational tourism sense, this lake falls behind the Gorno Lake.

The lake Marusha is located on the north side of the mountain Stogovo. Its length is 18 meters and the largest width of 11.8 meters. The maximum depth measures 0.47 meters. It covers an area of 166.9 square meters and length of the coastline of 48 meters. The color of the lake is bluish and in the coastal part it is yellowish.

2.3.1.1. Artificial lakes

In the Southwest Planning Region the most famous artificial lakes are the following: Debar, Globochica, Slatinko Lake and Kozjak.

Debar Lake, or **Spilje**, represents a water reservoir that comprises the waters from the river Black Drim and the lower reaches of the river Radika. The lake is located near the Albanian border. This near-border location in tourism terms can not be taken as a positive circumstance. Positive is that the lake extends along the road that connects Debar to the

Ohrid - Struga valley. The green colour of the lake has very pleasant impact to the passengers who are travelling in this direction. The total surface area of the lake is 13.2 km² and has a bank that can be used for swimming and sunbathing activities. The abundance with fish allows for performing fishing activities.

Lake Globochica represents a hydroenergetic reservoir on the river Black Drim. This lake is almost an extension of the Debar Lake. Also this lake extends along the above mentioned path so that the aesthetic property of its waters has positive effect on the passengers. The colour is dark green. Its beauty is extremely pronounced when the vegetative covering in the surrounding space is leaved, which allows integration of the colour of water with the green vegetation. The lake is 12 km long and the surface measures 2.7 km² and the greatest depth is 91 meter.

Besides the conditions for a pleasant stroll along the shore of the lake, as well as the swimming opportunities and conditions for sunbathing, also activities of sailing and other water sports can be performed. In this context the abundance of fish should also be emphasized, as an opportunity for fishing tourism activities.

Slatino Lake is located 35 km north of Ohrid, in the municipality of Debrca, near the village of Slatino. The climatic conditions allow swimming activities. The lake is rich in fish, which makes it suitable for fishing activities.

Kozjak is considered to be one of the largest lakes in Europe, 32 km long and about 135 meters deep. Located at an altitude of about 470 meters above sea level and is rich in fish. It is situated about 25 km downstream from the mouth of the river Treska in the river Vardar.

The tourism value of the lake is contained in the recreational and fishing opportunities it provides. The proximity of the reserve Jasen positively effects on the tourism significance that the lake Kozjak has.

2.3.2. RIVERS AND SPRINGS AS TOURISM VALUES

The rivers in the Southwest Planning Region are tourism - motivational attractions, which attract tourists primarily with its recreational and aesthetic properties, and some contain the component of curiosity. Most of the rivers in this area provide fishing, sailing and activities of swimming and sunbathing. The appearance of the waterfalls increases the significance and beautifies this geographical area, thus making it more appealing in terms of beauty. Accordingly, rivers in the region should be observed as a tourism attraction and as part of the tourism - geographical environment.

The **river Treska** is an interesting river from its source to the mouth at the Lake Kozjak. The geomorphologic basis is upgraded with characteristic hydrographic features. Sources that are located in the village of Izvor, near Kicevo, are very interesting. The organization of space and the traffic connectivity with asphalt roads enables tourists' visits. The sources are located at only 500 meters from the main regional communication Ohrid - Kicevo. Besides the educational values, this space provides a pleasant feeling, which is based on recreational, aesthetic and curiosity properties. The flow of the river itself can be used for fishing activities, walks and canoeing on the wild waters, for which this river has special reputation, not only domestically but also internationally. By renowned experts the river Treska is evaluated as having greater tourism importance than Vardar.

The drainage-basin of the **Black Drim river** has a surface area of 2,590 km² and includes the catchment area of the lake. Given the fact that Prespa Lake flows in the Ohrid Lake, the total catchment area is increasing and measures 3,350 km². According to the size, it is the second largest drainage-basin in Macedonia.

Given the fact that on this river the accumulation Globochica and Spilje are built, its watercourse extends from the outflow of the Ohrid Lake to the village Tashmarunishta. From the entrance to the gorge begins the formation of the hydro-accumulation, Lake Globochica. Under the hydropower station starts the second lake formation, with the lake Spilje. Accordingly, the watercourse is quite short, but that does not mean that its value is reduced as well.

The outflow of the Black Drim river from the Ohrid Lake is distinguished by an outstanding beauty and special curiosity characteristics. Above this point a wooden bridge has been built which is used for crossing the place where through the noise of the water, the channelled part of the river is being formed. The attractiveness of this place is increased in significance because rarely can be found such outflow of a river from a lake, and to be a direct observer of this phenomenon.

The river Black Drim has a regulated riverbed in its course through Struga. In this part the river is very beautiful, with a distinctive dark – green color. Therefore this river also represents an ornament to the city. The paved sides of the constructed embankment are the main promenade of Struga. Besides this, this channelled part of the river represents an opportunity for swimming activities, where the bridges of the river are being used as jumping spots. Furthermore, the Black Drim river in this section can be used for sailing and sports - recreational activities. The river here is also used for fishing activities. Mostly the fish plashica is being fished, which can be found here in abundance. The embankment in Struga is very convenient for organizing fishing competitions, which gives this area a special dimension.

North of the urban channelled space, through the Struga valley, until the Drimkol Gorge, i.e. to the lake formation of Globochica Lake, the Black Drim flows as a lowland river. The low

shores in several places in this section can be used for swimming activities and sunbathing. Characteristically is, however, that this section represents one of the most significant fishing areas in the Republic of Macedonia.

In the upper watershed of the Black Drim river, several small rivers occur. These are: Belicka, Vevchanska and Labunishka River. Although these are relatively small watercourses, given that they are mountain streams, they are very attractive nevertheless. Among them, considerable attention deserves Vevchanska River. Especially attractive are the Vevchani sources, from which this watercourse is being formed.

The **Vevcani Springs** are a part of the group of monuments of nature in the Republic of Macedonia. They are in fact rare pseudo-periodical – syphonic sources which are located in a cave area. That means the curiosity properties are highly emphasized, so that they can be used for admiration, but also for education activities. Located at the foot of the mountain Jablanica, in a scenic area, at an altitude of 950 meters above sea level, they draw in with their beauty. Moreover, this is a very suitable area for picnics and walks with an emphasized recreational attractiveness

The **springs at St. Naum** are consisted of several sources. The waters from around 45 sources in this area fill the small pond. The pond has a surface area of 324 m², a maximum depth of 3.5 meters and a valley of about 1 km. The pond consists of two parts. The whole complex is very attractive. However, the attractiveness of the second part is greater because two small islands appear there, which, in addition to the beauty that they create, produce a very interesting and unique space. From this pond the water flows into the lake through a short flow. The spring area of the monastery St. Naum is one of the most attractive tourist sites in this part of the Republic of Macedonia. The springs characterize by providing large amounts of water (6.5 to 11 m³/sec). This water makes a lake formation then flows into the lake. The attractiveness is not contained only in the amount of water and the way it flows into the lake, but also the fact that 56 % of the water from these springs originates from the Prespa Lake. This emphasizes the curiosity dimension of the tourism motivation, because it represents a phenomenon that rarely can be found in the geographical area. Tourists are able to be on the place where the waters of two relatively large tectonic lakes "merge together".

Along with the beauty of spring water and the beauty of the surrounding area in which they are located, the sources are the target of numerous visitors.

Biljana Springs is located near the town of Ohrid, just below the road to St. Naum. The capacity of the water varies from 30 to 120 l/sec. Although much of the water that comes out is captured, there is however a quantity of the waters that is used to beautify the space. This water flows into the lake, but in the way that the source is channeled, and the surrounding area is constructed for relaxing walks.

Connecting the Biljana Springs with the famous song "Biljana was whitening the cloth" of this space gives, in tourism terms, curiosity and famous features. Therefore, there occur numerous tourist visits, and the site is interesting picnic place for the people from Ohrid.

The riverbed of **Sateska**, which formerly was flowing into the Black Drim from the right side, has artificially been diverted into the lake. This river deposits the alluvial material in the lake, blurring the water, which negatively affects on the tourism - recreational properties in the area of the lake which is the river mouth Sateska.

The **river Radika**, which is part of the lower catchment area, has great tourism importance. It is a fast mountainous river, which receives tributaries, whose average natural decline is quite large. However, only a small part of Radika belongs to the Southwest Planning Region and feeds the Debar Lake with water. Radika is rich in fish, that are used for fishing tourism activities.

2.3.3. THERMO-MINERAL WATERS AS TOURISM VALUES

The Southwest Planning Region is characterized by the abundance of thermo-mineral waters. In this space appear attractive spa outlets. These are Bansko spa, Banjishte and Kosovrasti.

Bajjishte spa

Banjishte spa is located at the foot of Krcin Mountain at an altitude of 870 meters above sea level. The mountainous area in which it is located does not appear as a barrier for arriving to the spa. In its vicinity a regional route Skopje - Debar - Ohrid is found, from which separates an asphalt road to the spa.

Physical - chemical properties of the waters in the spa Banjishte represent the basic attractive - motivational value.

In the spa appear three springs including: Nova Kaptazha, Gorni Bazen and Dolni Bazen. These springs vary in the abundance as well as their temperature and radioactivity of water.

The highest temperature of the water has the source of Dolni Bazen. It measures 39,3°C in it. The lowest temperature of the water is in the Gorni Bazen, which is 36°C, while the Nova Kaptazha has a value of 38,8°C.

The capacity of Nova Kaptazha is 51 l/sec., in Dolni Bazen 35 l/sec., while in Gorni bazen it is 5.2 l/sec. Therefore, the water temperature is around 38°C and the amount of water around 91 l/sec.

Radioactivity is the highest in Golema Kaptazha, where it is 26.75 m.u. in Gorni Bazen it is 20.65 m.u. and 16.89 m.u. in Dolni Bazen.

The water possesses sulfate anions, chloride, hydro-carbonate, hydro-borite and Hydro-arsenate, cations of calcium, magnesium, sodium, potassium and iron, colloidal dissolved oxides of manganese dioxide and silicon dioxide, dissolved gases of carbon dioxide, ammonia, hydrogen sulphide and sulfur dioxide, then the elements lithium, cesium, rubidium and fluorine, as well as free gases of hydrogen sulphide, carbon dioxide, oxygen and hydrogen.

The spa allows successful treatment of the following diseases:

- a) Rheumatic and bone-joint diseases;
- b) Traumatic problems;
- c) Gastroenterological diseases;
- d) Respiratory diseases
- e) Diseases of the urinary tract

The waters in this spa can also be used in recreational - preventive and rehabilitative sense

The surrounding area is interwoven with numerous sights that can be used for viewing the interesting landforms and landscape values of the river Black Drim, which allows full restitution. Moreover, the mediterranean influences are felt in the climate of this area and diverse floristic elements are convenient for walks. The construction of trails for such purpose and panoramas should be the basis for the use of the spa area for additional recreational - tourism activities.

In the spa also the old bath which firstly was used in Turkish - Ottoman period could be used as well as the new facilities. In the new facilities are instruments by which can be used for other types of therapy, which together with the therapy derived from the water quality, can superbly be combined.

Kosovrasti spa

Kosovrasti spa is one of the most attractive spas in the Republic of Macedonia. This conclusion derives from the hydrologic properties of the water, and the surrounding area

which also includes good traffic connection of the spa area. In this context a prominent place has the equipment of this spa.

Kosovrasti spa is located at the exit of the gorge of the river Radika, i.e. on its western side. It is located close to the regional road Skopje - Debar - Ohrid, which speaks for a good connection. Its position near the Ohrid tourism area allows the combination of activities with the use of the wider geographical area.

This spa is characterized with favorable chemical - mineralogical and thermal properties. The water temperature is 48°C, and according to the chemical composition it is sulfuric – carbonatic. The amount of water provided by its sources of this spa area is 120 l/sec., which represents the largest amount in relation with the other spa sites. That means that the potential of this spa is much emphasized.

On the chemical - mineralogical properties of the water in the spa, as well as on the other hydrological characteristics, the healing opportunities of the Kosovrasti spa are based. Thus, rheumatic diseases can be treated there, as well as women's diseases and various skin diseases. The healing properties of this bath are similar to the healing properties of the spa Banjishte.

The qualities of this spa can be used in the form of bathing, inhalation, drinking water and fangotherapy, i.e. cladding the body with mud.

The organized spa complex, despite the favourable conditions for accommodation, it also allows the use of other types of therapy using modern psychiatric methods.

The location of this spa in the gorge of the river and Radika and directly to the Lake Spilje reveals the possibilities for use of the spa area for walks in this geographical area.

In addition, there exist excellent conditions for the construction of sports - recreational complex that would enable a more contentual combination of activities, from water sports, swimming and sunbathing to alpinism.

It is assumed that the spa was known to the Romans, which can give the spa complex a famous and important dimension.

Based on the abovementioned facts it can be concluded that the Southwest Planning Region has excellent tourism hydrographic potentials. Some of them are activated and involved in the tourism offer, while others insufficiently found their place in this domain.

One of the largest problems in the use of the attractive properties of the hydrographic motives in the Southwest Planning Region is the insufficient protection from pollution of the

waters and the surrounding area, as well as the lack of organization and equipping of these areas and facilities.

2.4. BIOGEOGRAPHICAL TOURISM VALUES OF THE SOUTHWEST PLANNING REGION

Natural conditions in the Southwest Planning Region enabled the biogeographical forms to occur in this region as an interesting tourism value. This refers as for the flora, so to the fauna.

Under the influence by the sub-mediterranean climate, the mediterranean species are represented in the Ohrid valley and along the river Black Drim. From the mediterranean species the thriving of fig and almond should be emphasized. Exotic plants such as palms and banana trees show that in the Ohrid area remarkable is the moderate climate.

In the structure of the forests, dominate the deciduous forests prevailed by beech and oak. The conifer forests participate in a much smaller scale. The forest wealth is a great opportunity for stay of tourists in the mountainous areas in the Southwest Planning Region.

Pastures, rich in grassland vegetation represent an excellent opportunity for picnics and walks, as well as herbal tourism activities.

The wetlands plant forms are characteristic for swampy areas. These regions are present near the water surface, such as the swampy terrain in some parts of the Ohrid - Struga valley. The most notable site with such features is the Sini Viroj site or Belchishta Marsh.

Characteristic for this vegetation is that it is part of the wetland ecosystem, so in that sense is a suitable space for the education of visitors. Furthermore, these terrains in recreational sense can be used for hunting - tourist purposes in the form of hunting or in the form of photo-safari or hunting with camera.

Fauna in this region is very rich. In it present is the game from the classes of mammals and birds. They are the basis for development of hunting tourism.

In this region the following hunting locations and hunting areas are defined:

Table no. 5 – Overview of the hunting locations and hunting grounds in the SWPR

<i>Number</i>	<i>Place of the hunting association</i>	<i>Surface area in hectares</i>
1.	<i>Belcishta</i>	<i>24.500</i>
2.	<i>Mak. Brod</i>	<i>72.000</i>
3.	<i>Debar</i>	<i>26.356</i>
4.	<i>Struga</i>	<i>29.000</i>
5.	<i>Kicevo</i>	<i>44.700</i>
7.	<i>Ohrid</i>	<i>20.175</i>
8.	<i>Labunishta and Vevcani</i>	<i>19.480</i>

The distribution of hunting areas in the region mean that there are clear prerequisites for further activation of this tourist attraction to in the tourism offer, in the wider area in the Southwest Planning Region.

Fish represent a significant wealth in the Southwest Planning Region. Based on this wealth the opportunities are based for development of fishing tourism. In gastronomic terms are those the most important are the endemic species of trout and belvica, but in this sense also other fish species can be used.

2.5. SUMMARIZED PRESENTATION OF THE NATURAL TOURISM VALUES OF THE SOUTHWEST PLANNING REGION BY MUNICIPALITIES

The municipalities in the Southwest Planning Region represent an integral spatial unity with opportunities for mutual use of the tourism potentials. Therefore, it is necessary to present all components of natural character which exist in this region. Based on the conducted research we did the systematization by municipalities in order to provide tabular presentation of the natural values and their features:

Table no. 6 – Summarized presentation of the natural tourism values of the Southwest Planning Region by municipalities

Municipality	Natural resources	Tourism value, facility and locality	Characteristics
Ohrid	1. Geomorphological attractive – motivational factors	Galicica, Plakenska Mountain, Petrino	Opportunities for winter - sports activities, hiking and viewpoints
	1.1. Surface forms		
	1.1.1. Mountains		
	1.1.2. Mountain passes	Bukovo, Preseka	Opportunities for locating hotel - restaurant facilities, but are insufficiently used
	1.1.3. Gorges and canyons	Asan Gjura	Opportunity for inclusion of educational activities and cultural upgrading of the tourism offer
	1.1.4. Post – volcanic forms	Solfatara Duvalo, mofette - village of Kosel	Curiosity value with unique characteristics as evidence of the high levels of seismology of the SWPR
	1.2. Underground forms - Caves	Samotska Dupka	Regulated cave, but with low infrastructural maintenance
	2. Climatic attractive – motivational factors	20°C	Optimal values for sunbathing and swimming activities
	2.1. Air temperature in the summer months		
	2.2. Air temperature in the winter months	0°C	Mildness of the temperature for residence and winter - sports activities
	2.3. Precipitation	708.3	Lack of rainfalls in the summer months of the year and presence of snow and snow cover in the winter months as an opportunity for winter - sports activities
	2.4. Duration of the insolation	2.233	High levels of insolation as a factor for sunbathing, improving the health - recreational conditions and the use in sustainable - energetical purposes of the accommodation facilities
	2.5. Humidity	71 %	Optimum value for tourism accommodation and health - recreational

			functions
	2.6. Winds	Denik, Nokjnik, Strmec, Veternik, Belicki and Sever	Refreshing function with opportunities for pleasant walks and sleeping at night
	3. Hydrographic and hydrological resources 3.1. Natural lakes	Ohrid Lake	Basic attractive - hydrological motivational factor for the development of tourism
	3.2. Rivers	r. Grashnica	Possibility for organizing walkways at the river bank, resolving problems
	3.3. Springs	Biljana springs, St. Naum	Uniqueness of the springs in St. Naum, recognition of Ohrid tourism offer through the Biljana springs as a receptive destination and promotional value (song "Biljana was whitening the cloth")
	4. Bio-geographical resources 4.1. Fauna	rich fund of mammals, birds and fish	Opportunity for educational activities, observation of birds and animals, hunting and fishing
	4.2. Flora	Mediterranean species, fig, almond, some types of palms and bananas, beech and oak, grasslands, wetland areas	Promotional value that indicates mildness of the conditions and exoticism
Struga	Natural resources	Tourism value, facility and locality	Characteristics
	1. Geomorphological attractive – motivational factors 1.1. Surface forms 1.1.1. Mountains	Jablanica, Karaorman	Opportunities for winter - sports activities, hiking, viewpoints and mountain-biking
	1.1.2. Gorges and canyons	Gorge on the river Crn Drim	Impressiveness of the tourism offer
	1.2. Underground forms - Caves	Mlecnik - Tashmarunishta	The cave is not regulated it can be presented only at the entrance
	2. Climatic attractive – motivational factors 2.1. Air temperature in the summer months	20°C	Optimal values for sunbathing and swimming activities
	2.2. Air temperature in the winter months	0°C	Mildness of the temperature for residence and winter - sports activities

	2.3. Precipitation	708.3	Lack of rainfalls in the summer months of the year and presence of snow and snow cover in the winter months as an opportunity for winter - sports activities
	2.4. Duration of the insolation	2.233	High levels of insolation as a factor for sunbathing, improving the health - recreational conditions and the use in sustainable - energetical purposes of the accommodation facilities
	2.5. Humidity	71 %	Optimum value for tourism accommodation and health - recreational functions
	2.6. Winds	Belicki	Refreshing of the space
	3. Hydrographic and hydrological resources	Ohrid Lake	Basic attractive - hydrological motivational factor for the development of tourism
	3.1. Lakes		
	3.1.1. Natural lakes (tectonic and glacial)	Podgorecko, Gorno and Dolno Labunishko Lake (glacial lakes)	Exotic lakes with possibilities for walks along the coasts
	3.1.2. Artificial lakes	Globochica Lake	Opportunities for water sports and sport fishing
	3.2. Rivers	r. Crn Drim, Belichka and Labunishka river	Opportunity for diving, water sports and traditional fishing
	4. Bio-geographical resources	rich fund of mammals, birds and fish	Opportunity for educational activities, observation of birds and animals, hunting and fishing
Vevcani	4.1. Fauna		
	4.2. Flora	Mediterranean species, fig, almond, some types of palms and bananas, beech and oak, grasslands, wetland areas	Promotional value that indicates mildness of the conditions and exoticism
	Natural resources	Tourism value, facility and locality	Characteristics
	1. Geomorphological attractive – motivational factors	Jablanica	Opportunity for winter – sport activities, luge, hiking and mountain stays
	1.1. Mountains		

	1.2. Underground forms - Caves	Vevcani Springs	Presentation at the entrance of the cave
	2. Climatic attractive – motivational factors	According to the temperature gradient lower by 1°C compared to Ohrid	Similar characteristics as Struga
	2.1. Air temperature in the summer months		
	2.2. Air temperature in the winter months	According to the temperature gradient lower by 1°C compared to Ohrid	Similar characteristics as Struga
	2.3. Precipitation	The level of precipitation 5% higher compared to the parameters given in Ohrid	Similar characteristics as Ohrid and Struga
	2.4. Duration of the insolation	Similar to the parameters about Ohrid	Similar characteristics as Ohrid and Struga
	2.5. Humidity	Similar to the parameters about Ohrid	Similar characteristics as Ohrid and Struga
	2.6. Ветрови	mountain winds	Mildering the summer temperatures
	3. Hydrographic and hydrological resources	Vevcani Lake	Exotic characteristics with opportunity for walks and stays
	3.1. Glacial lake		
	3.2. Rivers	Vevcani river	Fishing activities and walks along the clean water of the river
	3.3. Springs	Vevcani Springs	Exotic space where besides the springs also located is the cave and rocky slopes, suitable for a pleasant stay and walks
	4. Bio-geographical resources	rich fund of mammals, birds and fish	Opportunities for hunting with a camera, hunting activities and wildlife observation
Debrca	4.1. Fauna		
	4.2. Flora	beech and oak, grasslands	Opportunities for a pleasant stay in a rich vegetation
	Natural resources	Tourism value, facility and locality	Characteristics
	1. Geomorphological attractive – motivational factors	Ilinska Mountain, Plakenska Mountain, Karaorman	Opportunities for climbing, winter - sports activities and mountain stays
	1.1. Surface forms		
	1.1.1. Mountains		

	1.1.2. Mountain passes	Preseka	Opportunities for locating restaurant facilities, but low usage of the space
	1.2. Underground forms - Caves	Jaorec, Velmej	Cave with paleontological findings that needs to be valorized as a presentation in front of the cave and its regulation
	2. Hydrographic and hydrological resources 2.1. Lakes 2.1.1. Natural lakes	Ohrid Lake	Basic attractive - hydrological motivational factor for the development of tourism
	2.1.2. Artificial lakes	Slatino Lake	Devastated with the priority put on repairing the dam that will enable the renewal of the recreational opportunities, restoring the fishing, sports activities and walks along the coast
	2.2. Rivers	Sateska river	Necessary repairing of the watershed in order not to cause pollution
	2.3. Wetland areas	Sini Viroj	Need for organizing the space for walks, fishing activities and environmental stays
	3. Bio-geographical resources 3.1. Fauna	rich fund of mammals, birds and fish	Opportunities for hunting with a camera, hunting activities and wildlife observation
	3.2. Flora	beech and oak, grasslands and wetland flora species	Opportunities for a pleasant stay in a rich vegetation
Kicevo	Natural resources	Tourism value, facility and locality	Characteristics
	1. Geomorphological attractive – motivational factors 1.1. Surface forms 1.1.1. Mountains	Krushino	Interesting excursion locality in the SWPR
	1.1.2. Mountain passes	Preseka	Opportunities for locating restaurant facilities, but low usage of the space
	1.2. Underground forms - Caves	Simka	Opportunities for organizing for presentation at the

			entrance
	2. Climatic attractive – motivational factors	20°C	Pleasant conditions for stays
	2.1. Air temperature in the summer months		
	2.2. Air temperature in the winter months	0°C	Pleasant conditions for stays
	2.3. Precipitation	786.7	Shortage of rainfalls in the summer period
	2.4. Duration of the insolation	2.064	Relatively favourable insolation
	2.5. Humidity	74 %	Optimal humidity
	3. Hydrographic and hydrological resources	Oslomej	Possibility for organizing the shores related to activities of character of anthropogenic values
	3.1. Artificial lakes		
	3.2. Rivers	r. Treska	Opportunities for fishing activities and walks along the clean water of the river
	3.3. Springs	Springs of the river Treska	Possibility for a pleasant stay, use of gastronomic values and educational activities and good accessibility
	4. Bio-geographical resources	rich fund of mammals, birds and fish	Opportunities for hunting with a camera, hunting activities and wildlife observation
Makedonski Brod	4.1. Fauna		
	4.2. Flora	beech and oak, grasslands	Opportunities for a pleasant stay in a rich vegetation
	Natural resources	Tourism value, facility and locality	Characteristics
	1. Geomorphological attractive – motivational factors	Karadzica	Protected multipurpose area
	1.1. Surface forms		
	1.1.1. Mountains		
	1.1.2. Gorges and canyons	Gorges on the river Treska	Opportunity for inclusion of educational activities and cultural upgrading of the tourism offer
	1.2. Underground forms - Caves	Slatinski Izvor, Peshna	Most significant caves in the Republic of Macedonia and highest possibilities for tourism

			valorization
	2. Climatic attractive – motivational factors	20°C	Pleasant conditions for stays
	2.1. Air temperature in the summer months		
	2.2. Air temperature in the winter months	0°C	Pleasant conditions for stays
	2.3. Precipitation	735.1	Lack of rainfalls in the summer period
	3. Hydrographic and hydrological resources	Kozjak	Opportunities for urban landscaping, water sports activities, hiking and fishing
	3.1. Lakes		
	3.1.1. Artificial lakes		
Plasnica	3.2. Rivers	r. Treska	Opportunities for fishing and walks along the clean waters of the river
	4. Bio-geographical resources	rich fund of mammals, birds and fish	Opportunities for hunting with a camera, hunting activities and wildlife observation
	4.1. Fauna		
	4.2. Flora	beech and oak, grasslands	Opportunities for a pleasant stay in a rich vegetation
	Natural resources	Tourism value, facility and locality	Characteristics
	1. Geomorphological attractive – motivational factor - Mountains	Busheva Mountain, Sac	Opportunities for walking, mountain climbing and pleasant stays in mountain conditions
	2. Climatic attractive – motivational factors	20°C	Pleasant conditions for stays
	2.1. Air temperature in the summer months		
	2.2. Air temperature in the winter months	0°C	Pleasant conditions for stays
	2.3. Duration of the insolation	Over 2000 hours	Relatively favorable insolation
	3. Hydrographic and hydrological resources - Rivers	Treska	Opportunities for fishing and walks along the clean waters of the river
	4. Bio-geographical resources	rich fund of mammals, birds and fish	Opportunities for hunting with a camera, hunting activities and wildlife observation
	4.1. Fauna		
	4.2. Flora	beech and oak,	Opportunities for a pleasant stay in a rich

		grasslands	vegetation
Debar	Natural resources	Tourism value, facility and locality	Characteristics
	1. Geomorphological attractive – motivational factors	Stogovo	Opportunities for walking, mountain climbing and pleasant stays in mountain conditions
	1.1. Surface forms		
	1.1.1. Mountains		
	1.1.2. Gorges and canyons	Gorge on the river Crn Drim	Impressiveness of the tourism offer
	1.2. Underground forms - Caves	Alcija – gypsum cave	Private ownership, but has exoticism because it is the only cave on the territory of the Republic of Macedonia of this kind
	2. Climatic attractive – motivational factors	20°C	Pleasant conditions for stays
	2.1. Air temperature in the summer months		
	2.2. Air temperature in the winter months	0°C	Pleasant conditions for stays
	2.3. Precipitation	872.2	Lack of rainfalls in the summer period
	2.4. Duration of the insolation	2.129	Relatively favorable insolation
	2.5. Humidity	74 %	Optimal humidity
	3. Hydrographic and hydrological resources	Debar Lake	Opportunity for water sports and sports fishing, swimming activities
	3.1. Artificial lakes		
Centar Zhupa	3.2. Rivers	Crn Drim, Radika	Opportunities for fishing and walks along the clean waters of the river
	3.3. Thermomineral waters	Banjishte spa, Bansko spa, Kosovrasti spa	Belong to the most organize spas in the Republic of Macedonia, and regarding the capacity Kosovrasti is the largest one
	4. Bio-geographical resources	rich fund of mammals, birds and fish	Opportunities for hunting with a camera, hunting activities and wildlife observation
	4.1. Fauna		
	4.2. Flora	Mediterranean species, fig, almond, beech and oak, grasslands	Opportunities for a pleasant stay in a rich vegetation
Centar Zhupa	Natural resources	Tourism value, facility and locality	Characteristics

	1. Geomorphological attractive – motivational factors	Stogovo	Opportunities for walking, mountain climbing and pleasant stays in mountain conditions
	1.1. Surface forms		
	1.1.1. Mountains		
	1.1.2. Gorges and canyons	Gorge on the river Crn Drim	Impressiveness of the tourism offer
	2. Hydrographic and hydrological resources	Debar Lake	Opportunity for water sports and sports fishing, swimming activities
	2.1. Artificial lakes		
	2.2. Rivers	r. Crn Drim	Opportunities for fishing and walks along the clean waters of the river
	3. Bio-geographical resources	rich fund of mammals, birds and fish	Opportunities for hunting with a camera, hunting activities and wildlife observation
	3.1. Fauna		
	3.2. Flora	Mediterranean species, fig, almond, beech and oak, grasslands	Opportunities for a pleasant stay in a rich vegetation

2.6. NATIONAL PARK GALICICA AS A TOURISM VALUE IN THE SOUTHWEST PLANNING REGION

Galicica National Park was proclaimed in 1958. This park covers parts of the mountain range Galicica with the coastal areas of the lake. Part of the National Park belongs to Pelagonia Planning Region. Along with this part its surface area measures 22.750 ha.

Galicica Mountain is located in the southwestern part of the Republic of Macedonia. It is actually a horst that rises between Ohrid and Prespa valley.

Such form of the mountain Galicica and its position between the two largest lakes in the Republic of Macedonia represents a special tourism value. It is significant in the geographical environment with its imposing size. The highest peak Magaro is located at an altitude of 2,254 meters.

From this mountain area stretching are very beautiful sights from the Ohrid and Prespa Lake. Especially attractive is the possibility of the visitors to observe at the same time two beautiful lakes. The attractive landscapes, aesthetic values and curiosity characteristics refer to the mountain sides that Galicica possesses.

From the high viewpoints of the mountain Galicica also outstanding scenery is stretching which reaches the mountain Jablanica and the Albanian mountains on one side and Pelister on the other side.

Although this is a high horst with dominance in this space and with extremely steep sides, the communication is very good. Through this mountain a road connection is passing which connects the Ohrid with the Prespa valley

In the geological composition of the mountain Galicica the limestone prevails. Related to such mountain structure, the appearance of numerous surface and underground karst relief forms are based. The surface karst forms here appear uvali, vrtaci and karst fields, and from the underground forms, interesting are numerous caves. The largest and most important cave is Samotska Dupka.

From the more significant tourism values of the national park Galicica the coastline of the Ohrid Lake aquatorium should be noted.

Of all hydrographic phenomena the springs in the monastery St. Naum have the most tourism significance. The interesting hydrographic form and the lush surrounding vegetation, fauna of the surrounding area and rich wildlife in the water, is so harmonized that makes this spring to be one of the most attractive places in the Southwest Planning Region and Republic of Macedonia in whole.

Flora and fauna are significant tourism values of the National park Galicica. Although this is a mountain with hardly accessible slopes and rocks, as well as altitudes of over 1,500 meters, however there exists very interesting flora and fauna, which contained primordial values, which gives the National Park a special dimension.

In this space representatives of different floristic types exist. They are located on the steep vertical cliffs, on the rocky surfaces or on a shallow and deeper soil. This diversity of landscapes and pedological substrate and other environmental factors conditioned the emergence of various floristic forms which are rare or typical only for this area.

The flora is represented with over than 600 plant species, of which over 170 are woody vegetation. Such diversity can not be seen on the other mountains in the Republic of Macedonia. This fact does not only include the Republic of Macedonia, but also significantly larger areas.

In the region of the National Park Galicica, the diversity of plant species and environmental conditions has created numerous floristic communities. On Galicica represented are communities that are characteristic for regions influenced by the submediterranean climate, i.e. from warm areas and arid tropical communities as well as communities that are resistant to cold climate and are typical of the Alpine regions.

On the mountain Galicica plant species occur that existed in other conditions in the past, or they exist as relict species as well as species that have endemic characteristics. In tourism terms they have primarily curiosity characteristics, and are often used for educational purposes.

Galicica National Park is characterized by interesting and diverse fauna. Research of large fauna indicate the existence of about 170 species of animals from which 10 species are amphibians, 18 species are reptiles, 124 are birds and 18 are mammals. There are thousands of other animals, most of which are examined in the Ohrid Lake.

The areas in the national park in which the presence of man is reduced have the richest fauna.

The National Park besides the natural values, possesses also significant cultural - historical monuments.

The high slopes represent excellent terrains for rock climbing. Thus, the section under the peak Magaro (2.255 meters) is 760 meters high and is very suitable for alpine conquering, while under the slopes of Golem Vrv and Tuglajsh, which height is 180 meters, are suitable for climbers – beginners.

Winter sports ski activities take place in the complex Suvo Pole, under the peak Tomoros (1.675 meters), but there also exist conditions for incorporating other regions in this type of tourism offer.

The threatening of the National Park represents a very serious problem, despite the undertaken activities. Tourism should be aimed at preserving these values, in order to use them as such. That is the case with the complex around the springs of Black Drim, which is located in an area with strict regime of protection, and traditionally in this location tourism - recreational activities are being developed. Similar problems exist in other parts of the coastline, such as the northern and southern areas of Trpejca, especially around the church St. Mother of God Zahumska.

SWOT – ANALYSIS OF THE NATURAL RESOURCES

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Uniqueness and rarity of geomorphological forms	Insufficiently ensured accessibility of the mountains	Using funds for rural and balanced development of the Republic of Macedonia	Degradation and devastation of the space
Existence of relatively high mountains	Poor regulation of caves	Using funds from international – IPA, IPARD and other thematic programs of the EU, the UN and others.	Losing the status of UNESCO
Morphological development and dynamism of the landscape	Insufficient signalization of the geomorphological forms	Linking the natural values of the neighboring regions and the creation of a joint offer on the natural values	No totally defined responsibilities on the natural heritage
The existence of a complex of caves	Insufficient involvement in the tourism offer	Through a process of valorization, integrated protection of nature in the space	Massive construction activities in the attractive natural localities
Steady temperature characteristics throughout the year	lack of information		
Significant insolation of more than 2000 hours per year	Absence of mechanisms for movement control		
Optimal humidity	Lack of infrastructural landscaping and equipping		
Good ventilation and low fog			
Relatively long lasting snow coverage in the high mountains			
Exceptional wealth of tectonic, and glacial lakes			
Interesting rivers with significant elevation			

differences along the stream			
Existence of attractive springs			
Richness of thermomineral waters - spas			
Richness with fish			
Ohrid Lake – part of the World Natural (and Cultural) Heritage			
Wealth of big and small game and birds			
Wealth of medicinal and aromatic plants			
Protected spatial units and facilities			

3. CULTURAL RESOURCES OF THE SOUTHWEST PLANNING REGION

The Southwest Planning Region is characterized by the abundance of cultural resources and potentials. The overall legacy of this character can be differentiated in the following way:

- material;
- spiritual heritage and
- special events.

Researches were carried out by municipal representation and value of tourism facilities, sites, phenomena and relations in the municipalities of the Southwest Planning Region.

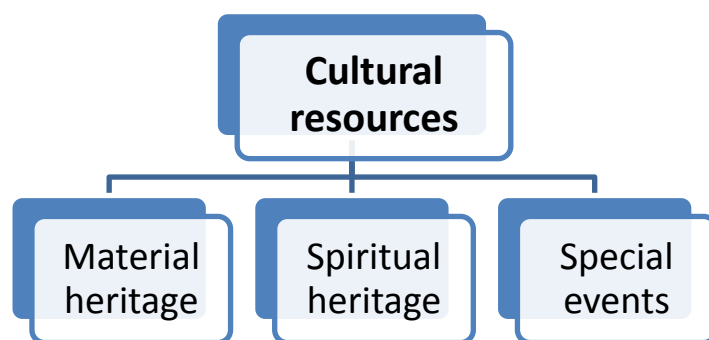


Chart no. 3 – Cultural resources

3.1. SUMMARIZED CHARACTERISTICS OF CULTURAL TOURISM VALUES OF THE SOUTHWEST PLANNING REGION BY MUNICIPALITIES

Cultural resources in the Southwest Planning Region are not evenly distributed. Therefore they are presented by municipalities. Thereby the localization by name and location was taken into consideration and with the characteristics that they possess in function of tourism development of the Southwest Planning Region.

Table no. 7 – Summarized presentation of cultural values of the Southwest Planning Region by municipalities

Municipality	Category	Name	Characteristics
Ohrid	Attractions	Name	Characteristics
	1. Attractions 1.1. Monuments 1.1.1. Religious buildings - Christian	Christian monuments: Monastery St. Kliment St. Panteleimon, St. Sophia, St. Mother of God Peribleptos, St. John Teologian Kaneo, St. Mother of God Bolnicka, St. Nikola Bolnicki, Mal St. Kliment, St. Demetrius, Mali St. Vraci, St. Constantine and Elena, St. Nikola Gerakomija, St. Mother of God kamensko (the iconostasis of the church), St. Nikola, St. Georgi; St. Petka – Velgoshti, Monastery St. Naum (v. Ljubanishhta), St. Mother of God Zahumska (v. Trpejca), St. Stefan, St. Mother of God Peshtanska, St. Erasmus	Exceptional grouping and concentration of monuments of highest quality and artistic achievement of cultural heritage, some of them listed in the list of World Cultural Heritage of UNESCO
	1.1.1. Religious buildings - Islamic	Islamic monuments: Ali Pasha mosque, complex Zejnel Abedin pasha (mosque, teke and residential building), turbe of Sinan Celebi, Cross mosque Hadji Turgut	Rare and old monuments which over time received adaptations and modifications that mark the Islamic culture
	1.1.2. Public buildings	Amam Voska, Administrative Building the Scientific Institution - Institute and Museum Ohrid, Administrative Building of Debar – Kicevo Diocese	Well conserved buildings with a new function (Hammam Voska - required conservation)
	1.1.3. Fortresses	Samuil Fortress, Engelana - Gabarski hill, fort above Gradiste - Bay of bones (Roman castrum)	Extremely important fortresses, some of them preserved, and some require conservation
	1.1.4. Archeological sites	Ancient theater, Plaoshnik, Ohrid Citadel, Studencista, St. Erasmus	Some of them incorporated in the tourism offer but for part of them necessary is conservation and tourism

			presentation
	1.2. Museums 1.2.1. Historical - art museums	House of Robevci, Gallery of Icons, House "Hristo Uzunov", House "Grigor Prlicev", House "Uranija", Bay of bones	Exceptional complex of museums with outstanding tourism presentation
	2. Events and manifestations 2.1. Religious events	Bogojavlenie – Epiphany, celebrating Eastern; Assumption of the Virgin Mary in Skrebatno, Celebrating St. Kliment and St. Naum, Celebrating St Petka in Velgoshti, Celebrating Bajram	The most important events of this kind which are well valorized in tourism terms and attract large number of tourists and visitors that should be kept and nurtured
	2.2. Secular festivals	Festival „Ohrid Summer“, „Balkan Festival“, „Ohrid Fest“, International Seminar on Macedonian Language, literature and culture, „ Prlicev sermons “, „ Ohrid feast “ Ohrid Swimming Marathon	Festivals attended by world renowned participants and some of them are placed in international associations in this field
	3. Ethnographic heritage 3.1. Traditional architecture	Urban core of the city - registered individual residential buildings of city architecture	Established and recognized urban landscape with traditional features. Partially threatened by appearance of new buildings and inadequate buildings
	3.2. Economic activities	2 families for manufacturing Ohrid Pearls Traditional paper making, woodcarvers, icon painters, mosaic makers, stained glass, kasan makers, filigrees	Wide range of activities that can find place in the tourism offer, souvenirs and art works with motifs of traditional art
	3.3. Folk costumes	Manufacturing folk costumes	Complex old-city traditional folk costumes exhibited in several specialized shops, museum exhibitions, traditional performances and souvenir shops
Struga	Attractions	Name	Characteristics
	1. Attractions 1.1. Monuments 1.1.1. Religious buildings - Christian	Christian monuments: St. Georgi, Monastery Kalishta and St. Atanasij – v. Kalishta,	Presence of significant complex of religious temples

		Archangel Michael – v. Radozda, St. Spas – Vishni, St. Vlasij – Lozhani, St. Nikola – Vranishta, St. Nikola - Podgorci	
	1.1.1. Religious buildings - Islamic	Islamic monuments: Halveti teke and contemporary mosques	Opportunity for religious homogenization and visiting pilgrims from other areas
	1.1.2. Public buildings	Amam, Remains of a part of Via Egnatia - Radozhda	Need for fundamental conservation for tourism use Rare remains of an ancient road that must be conserved and signalized
	1.1.3. Archeological sites	“Mouth of Crn Drim”, “Church meadows” – Vranishta, St. Martinija – Tashmarunishta, basilica – Radozhda, basilica - Oktisi	Significant archaeological complex, partially conserved, but required signalling and tourist valorization
	1.2. Museums 1.2.1. Historical - art museums	Museum “D-r Nikola Nezlobinski”, Memorial house of the brothers Miladinovci, Gallery “Vangel Kodzoman”	Museum exhibitions with remarkable neatness and organization
	2. Events and manifestations 2.1. Religious events	Assumption of Holy Mother of God – Kalishta, Procession of St. Georgi, Celebrting of Bajram	The most important events of this kind which are well tourism valorized and attract large number of tourists and visitors that should be secured and nurtured
	2.2. Secular festivals	Struga evenings of poetry, Parade of Folk costumes, Struga music fall Kenge Jehoo	The most important events of this kind which are well tourism valorized and attract large number of tourists and visitors that should be secured and nurtured
	3. Ethnographic heritage 3.1. Traditional architecture	Groups of houses in v. Oktisi	An important complex of traditional architecture that deserves tourist valorization
	3.2. Folk costumes	Folk costumes of Veleshta, filigree	Isolated occurrences that need to be

			improved
Vevcani	Attractions	Name	Characteristics
	1. Attractions 1.1. Monuments 1.1.1. Religious buildings	Christian monuments: St. Nikola, St. Spas	Existence of complex of temples and sacred sites that may be linked in a common tourist program
	1.1.2. Public buildings	Remains of a part of Via Egnatia - Vajtos	Well conserved part of a communication that requires archaeological presentation and tourist valorization
	1.1.3. Archeological sites	Vajtos	Well conserved part of a communication that requires archaeological presentation and tourist valorization
	1.1.4. Industrial heritage	Old mill	Well-arranged tourist attraction in vital function
	1.2. Museums 1.2.1. Historical - art museums	Memorial house of Mihajlo Pupin	Well-arranged tourist attraction in vital function
	2. Events and manifestations 2.1. Religious events	Vevchani Vasilica Carnival Celebration of Vasilica Transfiguration of the Lord	Key elements of the tourism offer of Vevcani
	2.2. Secular festivals	Painting colony	Festival in its infancy
	3. Ethnographic heritage 3.1. Traditional architecture	Groups of protected houses	An important complex of traditional architecture deserves tourist valorization
	3.2. Economic activities	Façade handicraft	Insufficient tourism valorized which can enhance the presentation of the activities of this area
Debrca	Attractions	Name	Characteristics
	1. Attractions 1.1. Monuments 1.1.1. Religious buildings	Christian monuments: All saints – Leshani, St. Nikola – Velmej, St. George – Velmej, St. Mother of God Precista – Cell – Velmej, St. George – Godivje, Sts. Petar and Pavle – Mesheishta, St. Nikola – Mramorec, St.	Existence of complex of temples and sacred sites that may be linked in a common tourist program

		Mother of God and St. Nedela – Slatino, St. George - Vrbjani	
	1.1.2. Archeological sites	Trebenishka necropolis	Locality with exceptional findings that has no opportunity for onsite presentation to the tourist Recommendation for presenting copies of artefacts within the museum
	2. Events and manifestations 2.1. Secular events	Painting colony - Belchishta	Renowned colony that should be popularized and presented to the public
Kicevo	Attractions	Name	Characteristics
	1. Attractions 1.1. Monuments 1.1.1. Religious buildings - Christian	Christian monuments: St. Petar and Pavle, St. George – Lazarovci, St. George – Knezhino, Kicevo Monastery – Holy Mother of God – Precista, St. Nikola – Vraneshtica, St. Nikola – Cer, St Elijah prophet – Velmevci	Presence of significant complex of religious temples (Monastery of the Holy Virgin Kicevska an exceptional tourism potential)
	1.1.1. Religious buildings - Islamic	Islamic monuments: Sultan Bajazit – mosque, Baala maalo – mosque, Culu Baba teke, Bichinci – mosque	Opportunity for religious homogenization and visiting pilgrims from other areas. The older mosques need fundamental conservation
	1.1.2. Public buildings	House of arts – nezhino, amam, Saat kula	Good tourism valorization of the House in Knezino that may be part of the tourism offer of the region
	1.1.3. Fortresses	Kicevo – Kitino kale Markulija – “Marko Towers” - Arangel	Extremely valuable fortresses that need fundamental conservation, arranging and presentation for tourism visits
	1.2. Museums 1.2.1. Historical - art museums	Museum of Western Macedonia	An important museum in which to introduce innovative content for modern presentation of the heritage
	2. Events and manifestations	Celebrating of	Good tourism

	2.1. Religious events	Assumption of Holy Mother of God, Celebrating of Bajram	valorized and enrichment of content during tourists' stays
	2.2. Secular festivals	Painting colony	Renowned colony that should be popularized and presented to the public
	3. Ethnographic heritage 3.1. Traditional crafts	Pottery making – Vraneshtica, Velmevci	The most exposed element of the tourism offer in the field of traditional crafts in SWPR
Makedonski Brod	Attractions	Name	Characteristics
	1. Attractions 1.1. Monuments 1.1.1. Religious buildings	Christian monuments: Holy Mother of God, St. Demetrius, - Trebino, St. Atanasij – Modrishte, St. Mother of God – Gorni Manastirec, Church St. Nikola	Presence of significant complex of religious temples (Monastery of the Holy Virgin Kicevska an exceptional tourism potential)
	1.1.2. Fortresses	Devini Towers – Devic, fortress Gradec - Zdunje	Significant fortresses that need fundamental conservation, arranging and presentation for tourism visits
	2. Events and manifestations 2.1. Secular events	Kostenijada	Successful presentation of related natural values as part of the chestnut and its importance in the region
	3. Ethnographic heritage 3.1. Traditional architecture	v. Belica	Opportunity to visit the architecture with distinctive features
Plasnica	Attractions	Name	Characteristics
	1. Attractions 1.1. Monuments 1.1.1. Religious buildings - Christian	St. Nedela – Dvorci, St. Nikola - Plasnica	Existence of modest heritage, the opportunity for involvement in the regional offer
	1.1.1. Religious buildings - Islamic	Nurli mosque, Jani mosque	Opportunity for religious homogenization and visiting pilgrims from other areas. The older mosques need fundamental conservation
Debar	Attractions	Name	Characteristics
	1. Attractions 1.1. Monuments	Assumption of Holy Mother of God, St.	Presence of significant

	1.1.1. Religious buildings - Christian	George Victorious – Rajcica, St. Barbara – Rajcica, Assumption of Holy Mother of God - Gari	complex of religious temples (the monastery of St. George Victorious is an exceptional tourism potential)
	1.1.1. Religious buildings - Islamic	Islamic monuments: Hjunkar mosque	Possibility to include a wider complex of monuments of Islamic religion
	1.1.2. Public buildings	Old amam, New amam, Turkish bath – Banjishte spa	Opportunity for thematic linking of spa tourism with traditional Turkish baths
	2. Ethnographic heritage 2.1. Traditional architecture	Protected traditional buildings in Debar, Gari, Osoj	An important complex of traditional architecture that deserves tourism valorization
	2.2. Economic activities	Woodcarving	Recognition of space in this traditional activity
Centar Zupa	Attractions	Name	Characteristics
	1. Attractions 1.1. Monuments 1.1.1. Archeological sites	Fortress Kodzadzik	Significant fortresses that need fundamental conservation, arranging and adapting to the tourism offer
	1.2. Museums 1.2.1. Historical - art museums	Memorial House of Mustafa Kemal Ataturk	Rare value that can connect the Turkish and Macedonian people Great opportunity for tourism valorization

3.2. MATERIAL CULTURAL HERITAGE

The material cultural heritage in the Southwest Planning Region is unevenly deployed. Therefore, the heritage expresses greater representation in some municipalities in the region over the other. The material heritage in the Southwest Planning Region is represented by the rich tangible creation of the people who lived in this region in the past expressed through the cultural - historical monuments or religious, public buildings, fortresses, archaeological sites, then, museums and institutions of culture on various themes, traditional architecture and folk costumes.

Ohrid is one of the few cities in the Balkans whose continuity and first traces of its existence we can follow in the time frame of about two and a half millennia. On the foundations of the modern city Ohrid lies the ancient city of Lychnidos, an important and rich center as its successor. While the exact historical data confirms the existence of Lychnidos in the III century BC, as one of the more free historical datas, mentioned is the legend of occurrence of the city, the Phoenician Cadmus and his wife Harmonia as founders of the city. The gap caused by the previous modest detection of historical data on the deep past of the city, increasingly complements with the latest archaeological findings that build the image and splendor of the ancient Lychnidos. The necropolis found in Deboj area in the heart of the city, is the richest necropolis discovered in the Republic of Macedonia. In its vicinity is the Ancient Theatre, now adapted to accommodate new performers and visitors to be able, at least for a moment, to restore the two millennia old atmosphere in the building. Even today, artists, participants of the festival "Ohrid Summer" receive the "Ohrid Isis" which recalls the statue made of alabaster, a masterpiece of ancient artifacts from times and represents a testament for the artistic achievements of the contemporary artists. Crown of the golden age' of Lychnidos is the recent finding of the golden mask near the City Gate.

In Ohrid and its surroundings until today seven early Christian churches have been discovered. From them we should mention the polyconchal Church for its complex architectural structure and beautiful mosaics, especially those set in the baptistery, where the four rivers of paradise are presented in the form of four young boys. This lavish building was certainly the seat of lychnid Bishopric, found in the documents in the first half of the IV century. Early Christian Lychnidos keeps memories also from St. Erasmus of Antioch, the first Christian missionary in these regions, because the churches with his name today still lie along the road that leads to Struga. That 's the part where the ancient route of Via Egnatia passed through.

The metamorphosis lasted several centuries of the ancient Lychnidos into the Medieval Ohrid. Recreated was one of the most important cities in the Balkans. It kept the memories of the birth of Slavic literacy and culture in the works of St. Kliment and Naum, disciples of the Thessalonica brothers the Saints Cyril and Methodius. St. Kliment is still today celebrated as the protector of the city, while his activities were the education of 3.500 students, a phenomenon termed as the "first Slavic university."

The city of Kliment continued to be the cradle of Macedonian history, because here was the capital of Samuil's empire. The defensive walls which still today surround the old town, are named as "Samuil Fortress," in honor of the mighty ruler. From those times mentioned is the Ohrid Archbishopric (patriarchy), a significant religious organization, on which throne sat influential philosophers, writers and theologians. Its worthy successor today is the Macedonian Orthodox Church

The historical turbulent events left traces on the face of the city, and some survive to this day. Therefore today when we talk about Ohrid, we think about the legacy that is valuable to the whole world, and not accidental is the symbol of UNESCO, imprinted in all modern materials written about it.

Both monasteries of Ohrid, located on the shores of Lake Ohrid, are one of the oldest in the Slavic world, and their founders St. Kliment and Naum. Written have been legends for both spiritual brothers who simultaneously built their monasteries and placed in them their own graves, in order to be there forever, as it is said in the hagiography – next to the White Lake. Kliment's Monastery of Plaosnik was built in the heart of the wrecked lychnid Bishopric and right at this place he continued to spread the Christian word. The hagiography states that despite Kliment as a Bishop ruled outside of Ohrid, he always wanted to return to his monastery in search of spiritual peace and blessing. The renewed monastery complex still today is the place where thousands of pilgrims want to understand the beginnings of Slavic literacy and culture.

The other monastery, St. Naum, situated on the southern part of the lake, in a place with biblical beauty, despite the lush springs that fill the lake, more than a millennium represents a beacon of Macedonian culture. Although the monastery went through tough times, from the old church remained only two marble pillars at the entrance to the nave, living traditions are transmitted from generation to generation, and even the more recent church holds the seal of the St. Naum. Therefore, next to his grave, through fresco paintings described are all its wonders, including the most famous one, "Buckling the bear in the yoke", an image that for a long time decorated also the monastery seal. On the walls of the church also the seven Slavic apostels were painted, the first seven Slavic teachers as distant allusion to the Moravian mission in which, besides St. Cyril and Methodius, also participated St. Kliment and St. Naum. Although the monastery often was devastated, and its quarters suffered from fires, today it is still an important cultural and historical monument. And not only that, but it is the most attended monastery in the Republic of Macedonia. There come tourists, pilgrims and people who believe that somehow the saint helped or will help, because as the monastery is old, so old are also the traditions and the faith in the healing power of St. Naum.

The Ohrid cathedral, the church of St. Sofia, represents the most important monument reserved in the Republic of Macedonia. The building suffered severe damage, repairs and renovations over the centuries but still, that what remains as a painting art in the eastern part represents the most complete and most preserved fresco-ansamble in one Byzantine church from the XI century. Major impact on the thematic and iconographic aspects of the painting had the Archbishop Leo, the most trusted person of the emperor and the patriarch. This famous Ohrid Archbishop actively participated in discussions that were led between the Eastern and Western Church, debates that led to the Great Schism, the division that was officialized in 1054. Another famous Archbishop of Ohrid, some centuries later (1313/1314)

will be credited for the expansion of the Orthodox Cathedral. That was the Archbishop Gregorij, who was a mediator in the decreasing of the civil war that broke out in the Byzantine Empire between the grandfather and the grandson, the kings Andronicus II and Andronicus III Palaeologus. Gregoryij, as the top of his grandiose work, on the western facade of the church exonarthex, ordered the inscription on brick, where he compares to Moses from the Old Testament, and the church with the temple of Moses.

Another two churches from the end of XIII century stand high on the scale of values that are important today for the city of Ohrid. These are the churches St. John Kaneo and St. Kliment (the former St. Mother of God Perivleptos). The first one, because of its exceptional architecture and convenient location, at the end of the steep lake shores, became the symbol for the city of UNESCO. The second church, is decorated with frescoes of the painters Michael and Eutyches, from Thessaloniki, who their talent and youthful strength transferred in the paintings, which would become synonymous with the early Renaissance period from the times of the Palaeologi era. In a building located opposite the church today is a collection of Orthodox icons. This collection, besides the Sinai, Mt. Athos and the Russian, is one of the most important collections of medieval icons, which brings them on the top of European medieval art. The most notable icons dating from the XI to the XIV century are the works of painters who painted also the churches of Ohrid, but here with a more gentle drawing and coloring, managed to create works without any significant anthology of medieval art can not exist.

Christian monuments in Ohrid are: Monastery St. Kliment St. Panteleimon, St. Sophia, St. Mother of God Peribleptos, St. John Theologian Kaneo, St. Mother of God Bolnicka, St. Nikola Bolnicki, Mal St. Kliment, St. Demetrius, Mali St. Vraci, St. Constantine and Elena, St. Nikola Gerakomija, St. Mother of God kamensko (the iconostasis of the church), St. Nikola, St. Georgi; St. Petka – Velgoshti, Monastery St. Naum (v. Ljubanishta), St. Mother of God Zahumska (v. Trpejca), St. Stefan, St. Mother of God Peshtanska, St. Erasmus.

From the Islamic monuments in Ohrid should be mentioned: Ali Pasha mosque, complex Zejnel Abedin pasha (mosque, teke and residential building), turbe of Sinan Celebi, Cross mosque Hadji Turgut.

From the public bildings mentioned should be: Amam Voska, Administrative Building the Scientific Institution - Institute and Museum Ohrid, Administrative Building of Debar – Kicevo Diocese, while fortresses are: Samuil Fortress, Engelana - Gabarski hill, fort above Gradiste - Bay of bones (Roman castrum).

Larger archaeological sites with tourism potential are: Ancient theater, Plaoshnik, Ohrid Citadel, Studencista, St. Erasmus.

Museums in the region of the municipality of Ohrid are: House of Robevci, Gallery of Icons, House "Hristo Uzunov", House "Grigor Prlicev", House "Uranija", Bay of bones. There exists

an ongoing archaeological and ethnological exhibition, with the "Lapidarium" on an open area, in which integration are also souvenir shops, a permanent exhibition of medieval icons, permanent exhibition of historical documents from the period of the Macedonian uprisings against the Ottoman rule, the memorial house of the Ohrid poet and winner of laurel leave, with a part of temporary exhibitions, an exhibition dedicated to the formation of the Old Slavic literacy and culture.

Traditional architecture is expressed in the protected urban core of the city, as well as individual registered residences of the city architecture.

Situated further north of Ohrid on the shores of Lake Ohrid in the outflowing of the river Drim, is the town of **Struga**. Since from prehistory times, then in the antiquity, the old Enhalon (etymologically means eel) was a developed fishing settlement, which in medieval times was named Struga (according to the tools for fishing). The legends talk about the missionary activities of St. Kliment also in Struga, therefore in his honor the little river had gotten its name Klimetika. Several legends of his work are related to other places in the municipality such as with the monastery of St. Kliment, near the village of Gorna Belica. The character of Struga was changed when, according to the old records, the emperor ordered Samuel to dry the wetlands around the river Crn Drim. With Samuel's traditions associated is the building of the church St. Mother of God in Vranishta.

In the region of the city many cave churches appeared as refuge for the anachoretic monks. The cave churches in the Struga region can be a part of the cultural tourism offer. They incorporate elements of the religious aspects of human cultural history, but also present significant artistic values, expressed as a combination of natural features and the integration of the architectural creations in the natural ambient space. Furthermore, in the churches in Kalishta, Radozda and Vishni we can see important painting art creations.

As more important Christian religious buildings in the city can be mentioned: St. Georgi, Monastery Kalishta and St. Atanasij – v. Kalishta, Archangel Michael – v. Radozda, St. Spas – Vishni, St. Vlasij – Lozhani, St. Nikola – Vranishta, St. Nikola – Podgorci.

As a more significant monument of the Islamic culture among the religious buildings should be mentioned the Halveti teke.

As remains of public buildings in Struga represent the part of the trade route Via Egnatia in the village of Radozda.

From the many archeological sites there should be mentioned: "Mouth of Crn Drim", "Church meadows" – Vranishta, St. Martinija – Tashmarunishta, basilica – Radozhda, basilica - Oktisi.

Museums that exist in Struga are: Museum “D-r Nikola Nezlobinski”, Memorial house of the brothers Miladinovci, Gallery “Vangel Kodzoman”.

There exist relatively good preserved groups of houses in the village of Oktici as part of the material ethnographic heritage.

In the municipality of **Vevcani** from the preserved material cultural heritage should be mentioned the Christian monuments, as religious buildings: the churches St. Nikola and St. Spas, while from the public buildings that have been preserved are the remains of a part of Via Egnatia - Vajtos

Archeological site in the municipality represents the locality Vajtos, and from the industrial heritage with tourism potential should be mentioned the old mill in the settlement.

For the development of tourism also important is the Memorial house of Mihajlo Pupin.

There exist several protected houses in the form of groups as part of the ethnographic heritage, or the traditional architecture.

In the municipality of **Debrca** from the preserved material heritage important to mention in the group of Christian religious buildings, or monuments, are the following: All saints – Leshani, St. Nikola – Velmej, St. George – Velmej, St. Mother of God Precista – Cell – Velmej, St. George – Godivje, Sts. Petar and Pavle – Mesheishta, St. Nikola – Mramorec, St. Mother of God and St. Nedela – Slatino, St. George – Vrbjani.

One of the most important archaeological sites not only in the Southwest Planning Region but also in the Republic of Macedonia, as beyond, represents the Trebenishta necropolis with the numerous artifacts that have been discovered.

The river Treska unites the region between Kicevo and **Makedonski Brod**, therefore it is not called Porechie by accident. The city next to the river, looking like a "boat", with the several bridges links Kicevo and Prilep to the east. Certainly, the river provides the natural communication in the mountainous and inaccessible part of the Republic of Macedonia. However deep it was nested in the restless river gorge, this communication was vital for this region since ancient times. Numerous are the remains of settlements and fortresses that protected the road communication connecting Polog with Pelagonija and best preserved are the towers in Devic. The isolation of the region of Makedonski Brod contributed often for it to stay out of the mainstream, which resulted in the continuous enlightening activity, even in the times when the Slavic alphabet was not in official use in the Middle Ages. The small

church in Trebino, near Brod, on its walls preserved the oldest Slavic records in the Republic of Macedonia, written on the frescoes in this modest building.

More significant churches as religious Christian monuments, or buildings in the region of Makedonski Brod are: Holy Mother of God, St. Demetrius, - Trebino, St. Atanasij – Modrishte, St. Mother of God – Gorni Manastirec, Church St. Nikola.

Remains of fortresses as monuments of culture included in the material heritage in this territory should be mentioned: Devini Towers – Devic, fortress Gradec - Zdunje.

Near **Kicevo**, high above the road leading to Demir Hisar situated is the monastery dedicated to the Mother of God that is known to the local people as St. Precista or Krninski Monastery. It was the backbone of the Macedonian culture and literacy, nestled in the woody shores of the mountain Visoj. Therefore, it stayed away from the cultural and political influences of the other areas, so, staying consistent throughout the centuries, the service was only performed in Macedonian language. In that way the monastery became the cultural center that has helped the surrounding towns and villages such as Kicevo, Krushevo, Debar, Struga and Ohrid. It happened in 1848, when the abbot Theodosius on the site of the old building has built the today grandiose monastery church with contributions of the people from all over western Macedonia. For the building of the church his own entry in the "Newspaper of Constantinople" also left Jordan Hadzi Konstantinov – Dzinot.

Another important monastery can have its cultural valorization, if soon the archaeological and conservation ongoing works are completed. That is the Knezhinski Monastery, situated on the slopes of Mount Bistra. The history of the monastery is associated with the Serbian King Milutin, and from that what remained, it can be concluded that it was a grand building from those times

More significant Christian monuments with tourism potentials represent: St. Petar and Pavle, St. George – Lazarovci, St. George – Knezhino, Kicevo Monastery – Holy Mother of God – Precista, St. Nikola – Vraneshtica, St. Nikola – Cer, St. Elijah prophet – Velmevci.

From the Islamic monuments, or religious buildings should be mentioned: Sultan Bajazit – mosque, Baala maalo – mosque, Culu Baba teke, Bichinci – mosque.

Preserved public buildings in Kicevo are: Sultan Bajazit – mosque, Baala maalo – mosque, Culu Baba teke, Bichinci – mosque.

Tourism potential also has the Museum of Western Macedonia.

The municipality of **Debar** does not include in it large urban centers, but therefore on the picturesque slopes of the Bistra mountain, several villages with outstanding architecture line

up. Their houses are popping up like towers on the steep terrain and defy the wild mountain landscape. Stone is the main building material, and the few small windows only complement the impression that these several storeys high houses-towers are masterpieces that appeared from the long building traditions in Macedonia.

South of the Bigorski monastery, in the picturesque areas of the Debar Lake situated is the monastery of St. Georgi Rajcica. Besides the old church of XVI century, high arise the new and well arranged quarters of the monastery.

More significant monuments or religious Christian and Islamic buildings in the region of Debar are: Assumption of Holy Mother of God, St. George Victorious – Rajcica, St. Barbara – Rajcica, Assumption of Holy Mother of God – Gari, as well as Hjunkar mosque.

Significant preserved publicbuildings for tourism development in this region are: Old amam, New amam, Turkish bath – Banjishte spa.

The material cultural heritage in the municipality of **Plasnica** compared to the other municipalities in the Southwest Planning Region is smaller and can be presented only by the Christian religious buildings: St. Nedela – Dvorci and St. Nikola – Plasnica. On the other hand Islamic religious buildings on this territory are the mosques: Nurli mosque and Jani mosque.

3.3. SPIRITUAL CULTURAL HERITAGE

Spiritual cultural heritage, as opposed to the material heritage, represents an intangible creation of people. In the Southwest Planning Region it is largely preserved and unchanged and is a significant potential for development of tourism activities in this area. It is presented through ethnographic creation or traditional economic activities and crafts, typical cuisine and food, as well as folk songs and dances.

The ethnographic heritage in the municipality of **Ohrid** is mostly preserved through numerous traditional economic activities and crafts: there exist two families for manufacturing Ohrid Pearls, traditional paper making, woodcarvers, icon painters, mosaic makers, stained glass, kazan makers, filigrees. There should also be mentioned the several manufacturers.

Struga, the city of bridges and poetry, as it is usually called, proudly holds these epithets, because even in the Middle Ages it is thought that there were about 100 bridges and the

traveler named Evliya Celebi noted that the Turkish beys and agii built their palaces on bridges over the wide river. Because of that Struga from ancient times has been a center of Slavic literacy and culture the numerous, and the numerous writings speak about that and which were kept in the city. Even the Russian Slavist and traveler Victor Grigorovich found here his "Struga Apostle" manuscript from 1277 and the ten pages from the oldest known text of Dušan's Code, known as "Struga manuscript"; here the monk Viktor in the XVI century rewrote the Slavic Code "Nomokanon". It is not a coincidence, that in the middle of the XIX century, Struga grew into one of the most important centers of the national revival activity in Macedonia. The credit belongs to the brothers Miladinovci, who actively influenced on their fellow citizens to reject the intensive Greek influence on the Slavic environment and for introducing the mother tongue in the religious services and education. This activity they paid with their lives, dying in the Constantinople dungeons.

From the rich spiritual heritage in the past, today partially preserved is the manufacturing of folk costumes in Veleshta, as well as filigree as a traditional craft.

In **Vevcani** as ethnographic heritage of traditional economic activities preserved is the Façade handicraft.

In the municipality of **Kicevo** preserved is the pottery making in the villages of Vraneshtica and Velmevci.

In the region of **Debar** the villages such as Gary (Filiposki) and Osoj are the centers from which originate a whole plethora of artists, builders, painters, wood carvers, that will flood the Balkans and leave testimonials for the Macedonian creative genius in the times that were not suitable at all for this kind of activity.

3.4. SPECIAL EVENTS

Special events are also of great importance for tourism development in the Southwest Planning Region. Often they can be used as a complementary category to the tourism offer. In this regard, in the region there are numerous events and manifestations that are represented by the religious (Christian and Muslim) and secular festivals (cultural, sports, business events, etc.).

In **Ohrid** as the most important manifestation that is being held is the cultural manifestation "Ohrid Summer", while other secular festivals that are being organized should be mentioned: „Balkan Festival“, „Ohrid Fest“, International Seminar on Macedonian Language, literature and culture, „Prlicev sermons“, „Ohrid feast“, Ohrid Swimming Marathon.

Manifestations of religious character with tourism potential are the following: Bogojavlenie – Epiphany, celebrating Eastern; Assumption of the Virgin Mary in Skrebatno, Celebrating St. Kliment and St. Naum, Celebrating St Petka in Velgoshti, Celebrating Bajram.

Characteristic for the events is that they are multi - thematic, such as the international stage - music festival, international festival of folk songs and dances, international festival of folk and pop music, the days dedicated to the poet Grigor Prlicev.

In **Struga** as a tradition and the most significant cultural manifestation the so-called "Struga Poetry Evenings" is organized, which has a worldwide scale of importance and is based on the tradition and respect for the beautiful written word. From the other secular manifestations with cultural potential are: Parade of Folk costumes, Struga music fall Kenge Jehoo

From the religious festivals that are being organized and have significant potential in tourism terms are: Assumption of Holy Mother of God – Kalishta, Procession of St. Georgi, Celebrating of Bajram.

Vevcani, according to the manifested consciousness about the importance of indigenous traditions, is an important example in the Republic of Macedonia. The Vevcani Carnival is an event that is primary to the development of culture in this small municipality. Such role this event received by the long-year tradition and with the well-conceived organizational plan for action in several areas. The tradition originates from the celebration of Vasilica (Old New Year). In its essence, the Vasilica rites centered on the ritual act of sending the old year, and welcoming the New Year. It is one of the most picturesque festivals and features many local traditions and customs. Historically, the Vevcani carnival its organized existence can be said to have started since 1902, for in 1993 Vevcani to become a member of the Association of European Carnival Cities

From the other events and manifestations should be mentioned: Celebration of Vasilica Transfiguration of the Lord, while of secular character an important event represents the Painting colony.

In the municipality of **Debrca** as a more significant secular event included in the events and manifestations and that has tourism potential is the Painting colony in the village of Belchishta.

In the municipality of **Kicevo** several events and manifestations are being organized, from which mentioned should be: Celebrating of Assumption of Holy Mother of God and the Celebrating of Bajram, as well as the secular event – the Painting colony.

SWOT – ANALYSIS OF THE CULTURAL RESOURCES

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Status as a world cultural heritage protected by UNESCO	Unfinished process of valorization by municipalities	Existence of high interest among the stakeholders for the development of cultural tourism	Widespread appearance of buildings that are illegal and have no ambient characteristics
Significant cultural heritage	Uneven distribution of cultural resources	Relatively good structure of human resources in the field of culture	Poor communication between the stakeholders
Existence of unique archaeological sites and public buildings	Absence of management plans for managing the cultural heritage	International promotion and presentation of cultural heritage of the SWPR	Interfering of authority
Developed network of museums	Poor utilization of cultural heritage in the tourism offer	Using domestic and international funds for improvement of cultural heritage in the function of tourism	Illegal excavation and trafficking of cultural values
Existence of movable cultural heritage	Existence of weak network of manufacturers of souvenirs	Intercultural polyvalent communication and exchanges	
	Weak branding of cultural resources in the function of tourism		
	Unequal care for cultural heritage		

4. SOCIAL CONDITIONS

Social conditions represent a framework in which the tourism potentials of the region can be activated in a way to allow the hotel – catering sector and the tourism activity to contribute to increase the participation in the Gross domestic product of the Republic of Macedonia. This means that the regulation will include normative conditions such as regulation norms, adopting strategic documents with importance for the development of the Southwest Planning Region and the Republic as a whole, then instruments to encourage the development such as subsidies, credits, loans, joint public - private partnership, IPARD and IPA funds as accession funds of the EU, tax incentives as important components in this domain. Also, the frame of social conditions contains the organizational structure of tourism and hotel - catering service and in this respect of particular importance is the promotion and involvement of stakeholders.

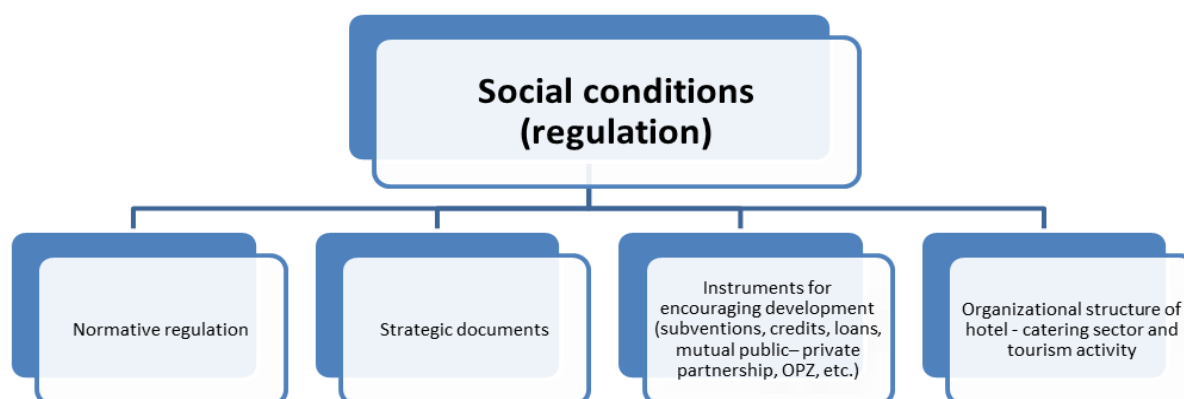


Chart no. 4 - Overview of the social conditions

4.1. NORMATIVE REGULATION

The sphere of the field of tourism in Macedonia is regulated by several legal decisions (Law on Tourism, Law on Catering Industry and Law on Tax for Temporary Residence) that have been adopted longer time ago, and lately, on these legislation amendments some changes have been made, according to the needs expressed in the practice.

More recently, the Government of the Republic of Macedonia, stressing out the need for further development of tourism and hospitality, and the improvement of the overall results

achieved in these activities has adopted several acts. Here, it should be mentioned the Law on the Agency for Promotion and Support of Tourism, Law on Rural Development and the recently adopted Law on tourism development zones. The basic objectives that want to achieve with them is the faster development of the mentioned activities, attracting foreign and domestic capital, increasing the competitiveness and increasing the employment in the field of tourism and hospitality.

Other legislation amendments (Law on Caravan Parks, Law on Protection of Cultural Heritage, Law on Environment, Law on Nature Protection, Law on Waste Management, Law on Quality of Ambient Air, Law on Water, Law on Ohrid...) suggest on the protection mechanisms that should be undertaken, because it has been noted that tourism is a form of "transformer" of the environment.

4.2. STRATEGIC PLANS AND DOCUMENTS

Space management in the field of tourism implies the basis for systematizing through the adoption of spatial plans and the plans derived from these basic documents.

4.2.1. SPATIAL PLANS AT NATIONAL AND REGIONAL LEVEL

The social framework for development of tourism involves the use of the already adopted strategic documents and plans. They provide adjustments in taking actions at different levels of municipality to republic level and uniting the impact on a horizontal basis. The numerous stakeholders in this way in the Southwest Planning Region are connected with the general social interest for tourism development.

In the context of tourism development on sustainable basis, we must accept the following spatial plans: Spatial Plan of the Republic of Macedonia, Spatial Plan of the Ohrid - Prespa Region, Spatial Plan of the River Treska, the Spatial Plan of Kozjak and the Spatial Plan of the National Park Galicica. The adopted spatial plans provide:

- Defining a rational and optimal spatial model for the organization and the use of space in function of tourism aimed at preserving biodiversity and protection of the natural values;
- Coordinating the spatial development for sustainable management of the natural and cultural resources, which are in the function of tourism;
- Providing conditions for tourism development and sustainable development of settlements in order to improve the quality of life;

- Revitalization of the rural space, the existing structures and facilities and traditional ways of conducting business, which can be expedient for tourism, and
- Defining the required spatial planning documentation for arranging and landscaping the space and determining the urban-technical conditions to space arrangement in order to develop the tourism and catering contents.

4.2.2. STRATEGIC DOCUMENTS ON REGIONAL AND LOCAL LEVEL

The Government of the Republic of Macedonia has identified tourism, together with agriculture, as a priority sector for development. In 2003 the "Global Study on Tourism in the Republic of Macedonia," was prepared but it was not implemented. Then a new tourism development strategy for the period of 2009-2013 was adopted, through which the framework for ensuring the creation of an image as a recognizable European destination for tourism was defined, based on the natural and cultural heritage, recognizable for the products and services sensitive to the environment and sustainability with high level of quality accordingly to the best global practices. In the context of the formulated goal, i.e. the national effort in this regard, the following documents have been adopted:

1. National Strategy for Development of Tourism;
2. Strategy for Balanced Regional Development;
3. National Strategy for Sustainable Development;
4. Strategy for Rural Development of the Republic of Macedonia;
5. National Strategy for Rural Tourism;
6. Program for Development of the Southwest Planning Region;
7. Planning documents at municipal level.

The essence of the adopted strategic documents is that tourism plays a significant role in the economic development and through it new investments can be attracted, new jobs can be created and the cultural values and natural treasures of Macedonia to be promoted. Thus, the Government has set its own goals that will allow continuing the support of this sector through appropriate measures, policies, specific projects for the construction of modern tourism infrastructure and promotion of Macedonia as an attractive tourist destination in the world. Future development will be based on an offer defined on the comparative advantages of Macedonia that will be used in the direction of ensuring

sustainable development of tourism and selective approach. The selective approach implies that outlined are the basic of tourism developmental types, and the eliminating of mass tourism is in the direction of established possible alternative forms in this sector.

The development of tourism in the Southwest Planning Region means that it should be in the context of the objectives established at a national level. It involves a high degree of the compliance. Also, these documents provide access to the implementation of the general objectives in specific localities and municipalities within the Southwest Planning Region.

4.3. INSTRUMENTS FOR IMPROVING DEVELOPMENT

In order to increase the general growth of overall performance in tourism in the recent years, a number of mechanisms and measures that have a significant positive impact in this domain have been actualized. One of the most popular measures that has been taken is subsidizing the foreign organized tourism trade, that make it possible to achieve subsidies on part of the costs for package tours for foreign tourists with at least realized three nights in all accommodation capacities in which in a professional way are offered catering services except for the accommodation in rooms and suites that have not reported conducting of tourism activity and have not finished categorization of them. Subsidizing is also done on conducted and organized tourism air, road and rail transport throughout the year, as well as round trips or tours across the country. It should be noted that this measure significantly influenced the increase in the registered visits of foreign guests, as well as their nights spent. The measure contributed to the return of part the traditional guest in this region, such as the Dutch tourists.

In the instruments and measures that are available included are credits and loans that the Government has provided for the construction of new accommodation facilities with relatively low interest rates and provided a several-year grace period for their returning. Unfortunately, despite the facilitated way of receiving the credit lines did not work out, that there was no significant increase in new accommodation facilities. This conclusion refers as to the Southwest, so to the other six planning regions except Skopje where there is a trend of increase of accommodation facilities, attendance and spent nights. With almost no effect, or no functioning at all of the public - private partnership, therefore the years long intentions to build the Hotel Complex of "deluxe" category in Ohrid, did not work out.

In terms of the development of rural tourism available are domestic funds (through the Ministry of Agriculture, Forestry and Water Management), such as the means of the IPARD program. The lack of training is the main reason that very few funds are used from these lines, and besides - when we talk about the IPARD Program – mentioned should be the complexity of the required additional documentation. Limiting factors represent the lack of

urban planning documentation for the unpopulated places, the expensive service for conducting changes to the planning documentation, proofs for the ownership, the right to mortgaging facilities and so on. On the other hand, it should be mentioned that the initiatives of the local population to build small accommodation exist, as well as for some other types of content that can affect the development of the rural economy.

A continuous trend for increased interest also exist in the Programs for cross-border cooperation with neighbouring Albania and Greece, which include measures for improving the general climate of cooperation in tourism, through "soft" initiatives, such as: promotional activities through printing materials, developing the necessary documentation, specialized trainings, marking pedestrian and bicycle trails, mapping of sites, construction of memorial houses... Often as applicants and users of resources appear the civic associations who play an important role in the positive trends for exchanging experiences and cooperation with similar organizations from both countries.

4.4. ORGANIZATIONAL STRUCTURE OF THE TOURISM AND HOTEL – CATERING SECTOR

The development of tourism and hotel - catering sector depends on its organizational structure. The improvement of structures is directly related to the use of available resources. Therefore, it is necessary to consider that the organization on different levels implies an approach that leads to optimal involvement of the stakeholders in the creation and managing of tourism policy, coordination and corrective actions and activities that have monitoring and inspection character.

The organizational structure in the Southwest Planning Region can be followed on a vertical and horizontal level.

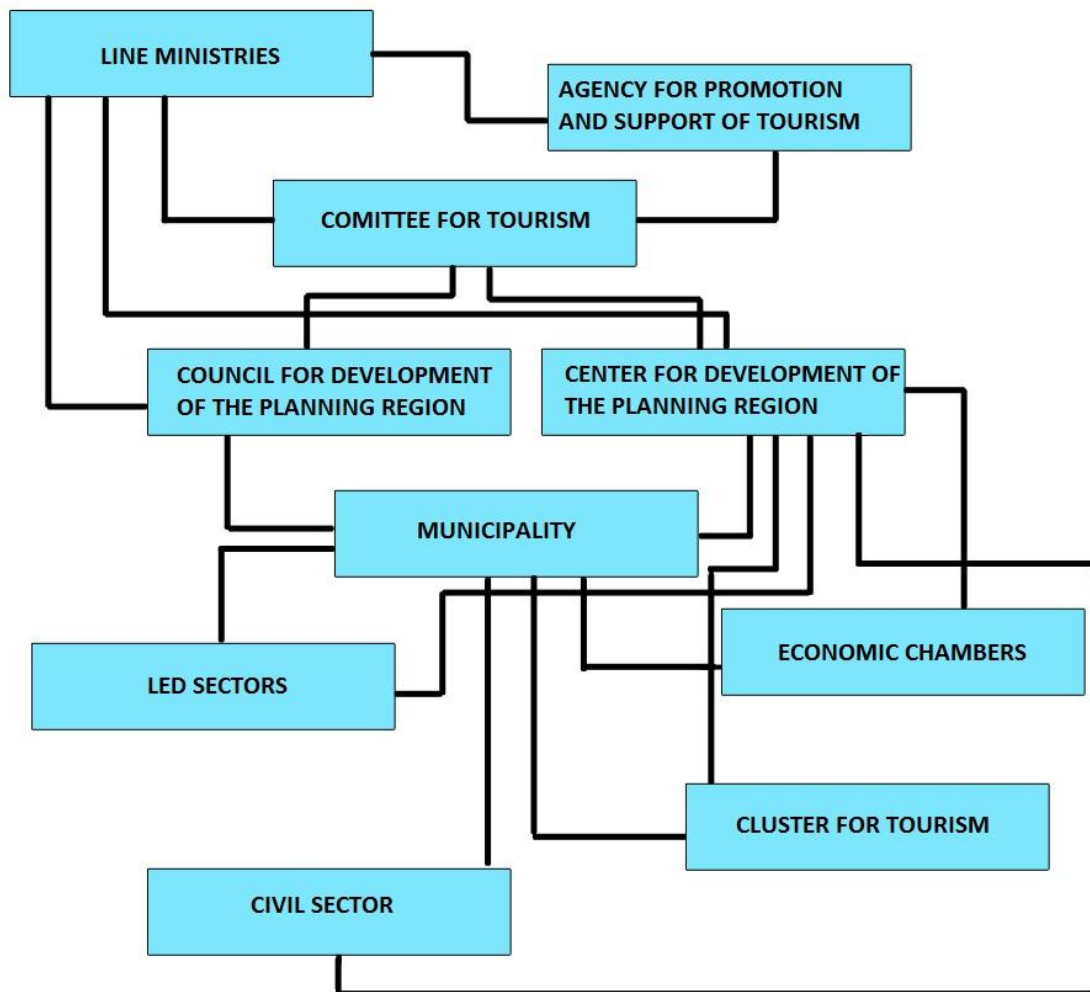


Chart no. 5 – Organizational structure

Along the vertical basis the structural relationships are at the level of local government through the regional to the national level. The quality of using potentials in these activities is directly depending on the interaction relationships that exist in this regard. This method allows improvement of the activity of all instances.

Given that tourism is a heterogeneous and complex activity, which means that it belongs to multiple sectors. The establishment of the Committee on Tourism on the highest level of government of the Republic of Macedonia is in the direction of moving the authority and the views of various sectors, creating sustainable policies and coordinated development of tourism in the regions and different spatial units. Therefore the body has a remarkable impact on the regional development and on the cross-sectorial coordination.

For the development of the potentials at state level a significant place have the Ministry of Economy - Department of Tourism and the Agency for Promotion and Support of Tourism. Although these two institutions have state character, their impact on the development processes in municipal and regional sense is very pronounced. Namely, the Department of tourism prepares development plans that are systematized and implemented at all levels. With the regard to the Agency for Promotion and Support of Tourism on the other hand, it should be noted that it has an active role in the direct implementation of activities that are related to the tourism balanced regional development and to the promotion of tourism in the regions, and thus in the Southwest Planning Region. The Agency prepares special programs that threat the natural and cultural heritage in the Southwest Planning Region.

The development of tourism in the Southwest Planning Region as well as in the other planning regions is under the supervision of the institutions and agencies of the state. For example, the safety of tourists and service providers has priority character in the Ministry of Internal Affairs of the Republic of Macedonia. Specific actions are being undertaken during the largest attendance in the Southwest Planning Region when experts are hired to increase security. Often, persons from the field of security who are coming from abroad are also engaged, as it was with the example with the hiring of police officers from neighboring Serbia, the Republic of Croatia and Israel in Ohrid during the summer period.

The state through various offices performs inspection services in different areas such as in the area of taxes, fees and the like. Thus, it is also involved in the regulation that refers to the municipalities and the region as a whole.

In the promotion activities of the Southwest Planning Region, the Agency is able to be actively involved. The attractions and receptive capacities of the Southwest Planning Region through the Agency are being promoted in accordance with the adopted programs on an annual level.

At the regional level the basic organizational structure represent the Council for Development of the Planning Region and the Center for Development of the Southwest Planning Region which have a crucial role in the linking of activities between the municipalities and connecting the region with the state institutions in the field of tourism and hotel - catering service.

The municipal organizational structure of tourism in the Southwest Planning Region occurs through the activities undertaken by mostly the sectors of local economic development. In the municipality of Ohrid in this sector even has tourism character. It is called ТЛЕП (TLED), or Department of Tourism and Local Economic Development. The existence of such sectors is of great importance because under their authority are the adoptions and implementations of development strategies and planning documents. Within TLED a developed tourist - information center operates. However, the largest part of the

municipalities in which the LEDs operate, don't have an established organizational structure in which its place has the informative - promotional center for tourism.

It is very important to consider that the adopted strategies, development plans and programs should ensure consistency with the documents adopted at different levels, from the municipal to the top levels.

In the past, the development strategies of the municipalities, such as Ohrid and Struga, were adopted without sufficient consistency with the Program for Development of the Southwest Planning Region and Strategy for Tourism Development of the Republic of Macedonia.

In the municipalities in the field of tourism as an organizational structure also appears the inspectorate that monitors the occurrences and processes that take place in this field, so they have a pronounced influence on the development of this activity.

The Departments for local economic development allow the adoption of acts for categorization and the establishment of programs for promotion and development of this activity through expert analysis.

The tourism industry in the Southwest Planning Region is organized into several chamber forms, as for example HOTAM and ATAM. However, we consider that it is necessary to form associations of craftsmen that will ensure the improvement of the economic activities.

The connecting on the horizontal basis is relatively weak. Namely, in the Southwest Planning Region in the municipality of Ohrid exists a Cluster for Tourism, but a target symbiotic relationship especially in the tourism industry has not yet organizationally been established. Our recommendation is that the horizontal ties should be based besides on the connecting of the economic subjects also on the inter-sectorial connecting and creating a cluster with a broader range of mutually interested, or the affected parties.

The analysis that we performed reveal that in the region exist non-governmental organizations of citizens of different character, such as for example environmental societies, associations for performing projects, associations of character of gender, religious and social equality for the promotion of relations in the national communities and so on. They provide a significant contribution with the criticism they have on society as a whole in the Southwest Planning Region. But we considered that there lack such associations with tourism meaning that would be the corrective of the relations in this sector.

SWOT – ANALYSIS OF THE SOCIAL CONDITIONS AND REGULATIONS

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Freedom of movement (constitutional category)	Not respecting the legislation (illegal renting, illegal transportation, unlicensed tour guides)	Created national Agency for the Promotion and Support of Tourism	Discrepancy between the strategic documents on vertical and horizontal basis
Adopted legal regulation for the development of tourism and hospitality	Unenforced recording and categorization of accommodation units	Established Committee for Tourism of the Republic of Macedonia	Interregional discrepancies of the strategic documents
Adopted spatial planning documentation (Spatial Plans, GUP, DUP)	Discrepancy between the strategic documents	Creation of tourist development zones	Weak participation in global tourism organizations
Adopted development strategies at level of the Republic of Macedonia	Past deadlines for implementation of the strategic documents	Possibilities for mutual cooperation	Inappropriate use of funds for tourism development
Adopted strategies by certain municipalities	Absence of horizontal cooperation and coordination between the participants in tourism	Inclusion of tourism as a sector in international planning regions	Inefficient use of the available resources
Existence of specific programs and development plans in the area of tourism	Insufficient involvement of NGOs	Intermunicipal, interregional and intraregional strategic tourism - development activities	
There exist favorable conditions for the development of tourism based on subsidies, loans and credits, benefits and tax exemptions	Pending urban documents in residential and nonresidential areas	Creation of a regional center for integrated tourism promotion	
There is an established an organizational	Insufficient training on the use of funds	Using new developmental programs on governmental and international level	

structure for development of tourism			
	Inappropriately use of funds received through programs for stimulating tourism development	Public - private partnership within the field of tourism	
	Insufficient utilization of professional staff		
	Low participation in municipal structures		

5. COMMUNICATION LINKS (TRANSPORT CONNECTION)

The development of tourism and hotel - catering sector, or the increase of their participation in the GDP of the Southwest Planning Region can only be realized through the use of the communication potentials that this space has. In this sense, it is necessary to use the existing types of communication links of different character in order to identify the possible solutions for improving the quality of communication and the quality of transport vehicles.

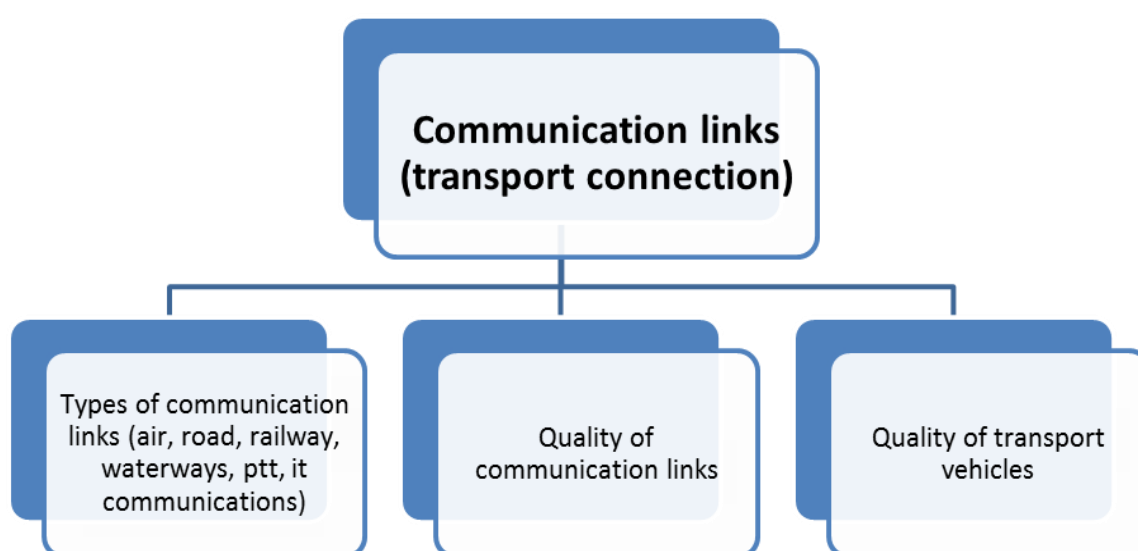


Chart no. 6 - Overview of the communication links

5.1. TYPES OF COMMUNICATION LINKS (AIR, ROAD, RAILWAY, WATERWAYS, PTT, IT COMMUNICATIONS)

The Southwest Planning Region as a material basis and potential within the field of tourism has all types of communications. That refers to the road network, railway, air transport and waterways transport.

5.1.1. ROAD NETWORK

The Southwest Planning Region is relatively well covered with national, regional and local roads

The total length of roads is 154 km and with this such construction (together with the Southeast Planning Region) belongs to the group of regions that have the highest share in the total national roads network in the Republic of Macedonia (1.123 km). The length of the regional roads in the Southwest Planning Region is 471 km. According to this indicator, that is a relatively good coverage, compared to the other regions because it belongs to the middle group of regions by the construction of roads out of this ranking.

The road network is relatively well developed in terms of length of the local roads. The length of these roads is 1.301 km and it can be said that according to this indicator the Southwest Planning Region has the longest network of local roads.

The coefficient that gives the ratio between the length of the road network and of the surface area of the region in km² for the Southwest Planning Region is 0,58 and is within the level of Macedonia (0,55). This communicability is a favorable basis for promotion of tourism. However, it is necessary to permanently maintain the condition of the network and maintain the quality for the needs of tourism and hospitality in the Southwest Planning Region.

5.1.2. RAILWAY

Railway as an infrastructure in the Southwest Planning region has modest features and is a part of the poor development on the state level. The total length of the railway is 27 km, from a total of 682 kilometers at the level of Macedonia. This indicator suggests that the railway network does not meet the needs of tourism development given that only about 5 % of the total railway network belongs to the Southwest Planning Region.

Such low level of development in the Southwest Planning Region is not the only negative circumstance. The coefficient of density of development is 8,56 and significantly lags behind the state level ratio (27). Not covered are the cities Ohrid, Struga, Debar and Makedonski Brod. From the region solely Kicevo is a part of this network. The basic problem of the region is the incomplete railway network and precisely the fact that it ends with a blind track. These conditions indicate the need for undertaking measures for a complete transformation of this sector in order for it to be put in the function of tourism development. The linking of tourist sites and facilities by rail is only in the part towards Kicevo, therefore it is necessary to combine the transport towards the attractive spatial

units in the Southwest Planning Region. Numerous tourism values are located outside accessibility of the railway.

5.1.3. AIR TRAFFIC

Air traffic in the Southwest Planning Region is conducted through the airport “St. Paul the Apostle”, located in Podmolje (Municipality of Debrca). With its international character it represents a significant potential that could be in the function of the development of tourism and hospitality. It allows tourists from the world easily to overcome space and stay this in this region. The circulation of travelers through this airport also means the presence of tourists from the neighboring regions, thus the airport represents a resource that not only has the feature of accessibility of tourists that stay in the Southwest Planning Region but also has a transit function. In this way part of the tourists who stay in the surrounding regional units can in certain time interval be in contact with the tourism values of this region.

5.1.4. WATERWAYS TRANSPORT

Transport on water in the Southwest Planning Region occurs as lake traffic on the Ohrid Lake. The existing transport is meant only for passengers and in the function of tourism. The routes to which transportation is being conducted is from Ohrid to St. Naum and Hotel Biser - Struga. It is necessary to build a port in Struga and to take measures for the establishment of a transportation link with Pogradec, Albania. This will allow for an increased movement of tourists, not only regionally, but also internationally

5.2. QUALITY OF COMMUNICATION LINKS

The quality of communication links is one of the most important factors in the improvement of tourism development. This means that improving the quality of transport communications is proportional to encouraging the activities related to tourism. Therefore, it is important to permanently conduct analysis of the conditions in the transport links and constantly to improve this sector.

The quality of the road network is not at the level of European standards.

Table no. 8 – Overview of the local road network of the SWPR

Local road network, km					
	2011				
	Total	Asphalt and cube	Mc Adam	Unpaved	Below average
Republic of Macedonia	9.300	4.469	790	2.753	1.288
Southwest Planning Region	1.250	673	138	312	127

Municipality					
Vevcani	18	6	7	5	0
Debar	140	77	30	27	0
Debrca	114	91	9	5	6
Kicevo	293	186	21	36	59
M. Brod	201	77	18	90	16
Ohrid	163	96	32	17	18
Plasnica	23	6	5	10	2
Struga	258	111	10	111	26
Centar Zupa	40	23	6	11	0

From the table overview it can be seen that the road network can be improved. That arises from the fact that the Mc Adam, unpaved and below average roads are with a total length of 577 km, or a share of even 46%. Characteristic is also that there exists an uneven expansion of the road network in the municipalities of the Southwest Planning Region. That means that it is necessary to improve the quality in the direction of balancing the road communications in order to get the tourism sites closer to the tourism clientele.

In terms of the quality of the road network, in this region, characteristic is the extremely poor condition of the roads especially of those of the national and regional rankings. A great part of the roads in the Southwest Planning Region were built before 30 to 40 years and are in very poor condition because they are improperly maintained and promptly restored. Such are the sections Straza - Kicevo - Podmolje (M-4) and Ohrid - Bukovo (M-5). In a bad situation is also the regional road Kicevo - Makedonski Brod.

The regional road Struga - Debar is in an extremely poor condition, which represents a factor that endangers the safety of tourists and travelers. The improvement that has been done this year on this communication has extremely positive effects on tourism development. Given the fact that the communication from Boškov Most to Izvor is not finished (through which Debar will be connected to the national communication M-4), this municipality has a peripheral position in the Southwest Planning Region. Thus, tourists can not easily communicate in this direction.

Also of great importance is the construction of the national communication from Makedonski Brod to Skopje thus establishing interactive developmental relationship between these two differently developed regions.

The motorway network is not on the level of the modern highways with separated lanes in one direction. This means that for the purposes of tourism it is necessary to improve it. The improvement involves creating conditions for a relatively quick accessibility of the region to the surrounding, its greater transitivity, and thus intensifying tourism development. The plans for linking Ohrid with Kicevo through a national road and Ohrid via Bitola and Prilep to the motorway E - 75 has extremely positive meaning for the development of tourism in the Southwest Planning Region.

The development of local roads in the region should be in the function of total accessibility of the attractive localities and facilities. In this direction, the improvement of the quality has crucial importance, because without such network it is simply not possible certain values to be included in the tourism offer.

In 2012 the local road network in the Southwest Planning Region was increased to 1.276 km. Of those, asphalt and cube represented 691 km., Mc Adam were 143, unpaved were 317 km, and the remaining 125km were below average

The quality of the railway network in the Southwest Planning Region represents a factor which can stimulate tourism development. However, the existing railway besides the other disadvantages is in a bad shape in terms of technical equipment. That reflects the transport of tourists, travelers and goods. Especially it should be noted that because of that only few tourists use this communication.

The quality of air transport is connected primarily with the modernization of the airport "St. Apostle Paul" in Podmolje.

The expansion of the airport should be in accordance with the movement of passengers and tourists, i.e. tourism as the leading service sector. The airport completely covers this region. The only negative circumstance is the poor accessibility to it in interregional terms, indicating the need for undertaking improvements in this regard. That refers to the improvement of communications towards the airport. The modern conditions of this airport allow a high level of safety, comfort of stay in the terminal building and the possibility of using catering services.

Improving the **quality of transport by water** refers primarily to the improvement of the ports as infrastructure, regulation of booking and reservation of seats and signalization of these ports. For the development of tourism in the direction of yacht - tourism particularly important is the building of a marina that will allow attachment of the vessels and their safety in the seasonal and non-seasonal period of the tourism region.

5.3. QUALITY OF TRANSPORT VEHICLES

The quality of transport vehicles in the Southwest Planning Region is at a relatively low level. This especially applies to the locomotives and wagons in the railway transport, the use of relatively obsolete vehicles in the road transport.

The boats should be improved in the direction of using sustainable energy sources as propulsion tools, removing the pollution of the type of using diesel fuel. In the field of catering present is the lack of restaurant offer on the boats and entertainment activities during the use of transport services.

SWOT – ANALYSIS OF THE COMMUNICATION LINKS

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Established road and rail network	Poor road network	Highway linking of Ohrid - Kicevo	Introducing administrative restrictions
The existence of an airport	Dilapidation of transport vehicles	Extension of Corridor 8 in the railway transport	Increasing the price of the energy sources
Existence of ports	Absence of trans-regional connection by rail (blind track)	Improving communication links with the neighboring regions and countries	Recession
Road communication links with the surrounding regions	Undeveloped waterways transport	Promotion of low-cost flights towards Ohrid	
Seasonal traffic regulation	Dilapidation of road infrastructure	Establishment of international waterways with the Republic of Albania	
	Poor signalization	Using information technology in traveling	
	Insufficient capacity to accept new bus lines in the season	Using pre-accession funds to improve regional development and cross-border cooperation	
	Low superstructural construction of communication links across the region	Introduction of European standards in passenger transport	
	Low usage of the airport capacity		

6. RECEPTIVE RESOURCES

Receptive resources are such resources in the Southwest Planning Region which with their values allow for an optimal stay of the tourists during their visit. In this group included are the accommodation facilities expressed by their size and structure, i.e. the quality of service, then the landscaping of the space in the function of tourists' visits and stay, the equipping with content elements in this function, the acceptability of tourists by the service providers and by the receptive population and the informational openness of the region as a factor that allows easy use of the receptive resources and tourism promotion of the potentials that it owns.

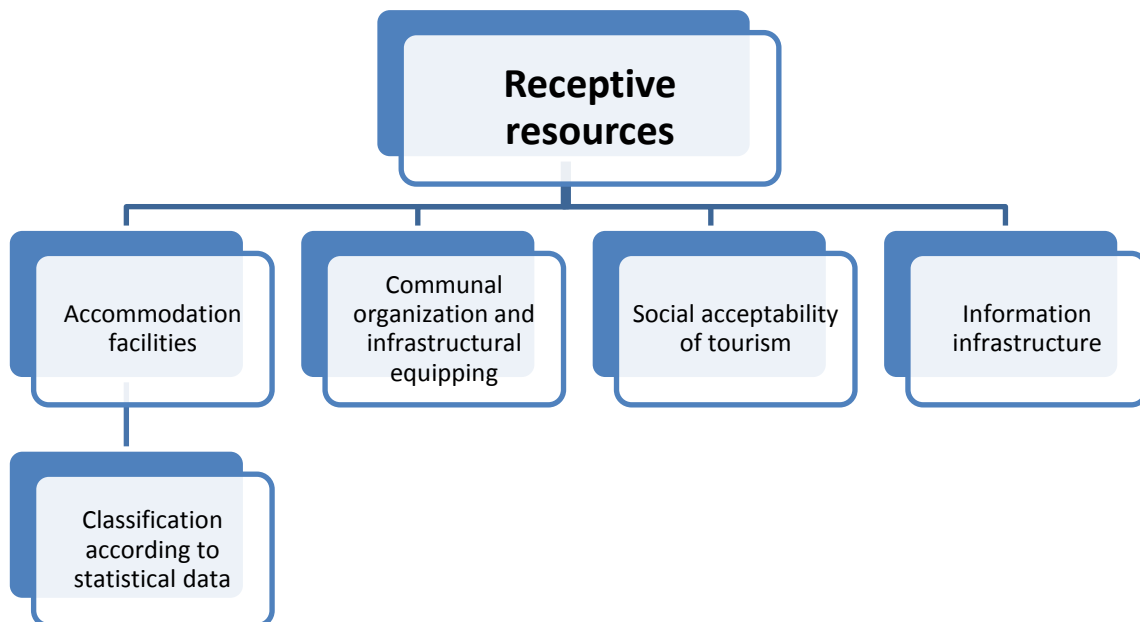


Chart no.7 - Overview of the receptive resources

6.1. ACCOMMODATION FACILITIES

Accommodation facilities within the receptive factors are very important because they, according to their volume, determine the possibility to accept tourists, and according to the quality of services, allow for a selectivity in the performance on the tourism market through which the tourism clientele in the choice of such services are in an optimal situation to satisfy their needs.

Accommodation facilities in tourism have a double meaning. On one hand they are the most important receptive factor of tourism development, while on the other hand represent a predictor or an indicator of the level of development.

The Southwest Planning Region is characterized by a relatively high representation of accommodation units within the facilities in the Republic of Macedonia.

The analysis of data on the accommodation capacities refers to the volume and structure of the units they are including.

In the Southwest Planning Region the number of rooms is 16.033 with a total of 41.454 beds. At the level of Macedonia the total number of rooms is 26.448, which means that even 60,62% of them are located in the Southwest Planning Region. The number of beds at the level of Macedonia is 69.737, and the number of beds in the Southwest Planning Region is 41.454. That means that in this respect the Southwest Planning Region accounts for even 59.44%. These indicators are for the year 2011, which is the last year that following statistical data are processed.

Table no. 9 - Accommodation facilities in the SWPR

Total	83
Hotels total	45
Hotels *****	1
Hotels ****	9
Hotels ***	7
Hotels **	17
Hotels *	/
Motels	2
Spa resorts	2
Workers resorts	8
Childrens and youths resorts	10
Temprary accommodation facilities	1
Uncategorized facilities for accommodation	15

From the indications given in the table no. 9 it can be noticed that in the structure the number of facilities is 83. Of these, the largest number of facilities, or 45, are hotels. In the structure of hotel accommodation prevail hotels with two and one stars, and just one hotel has 5 stars. This structure of hotel accommodation is indicatively a disadvantage and does not meet the determinations to develop elite tourism. Improvement is needed in this segment of tourism offer. The number of motels is also below the level for meeting the competitive tourism offer. Only 2 facilities are registered as motels. Such conjuncture is particularly unfavorable in the pursuit of transit tourism development. Given the fact that in the Southwest Planning Region there are only two spa centers and the number of such facilities is adequate. However, also within such centers there exists an open opportunity for locating such facilities. The social part of the tourism offer is also modestly represented. Thus, there are 8 workers resort and the number of children and youth resorts is 10. Therefore, having in mind that domestic tourism lags largely in the tourism trade, such improvement of the conjuncture would allow for a greater acceptability of the domestic tourism clientele. We must conclude that it is concerning the fact that there are 15 facilities that are not categorized, as well as 356 apartments that have not done such procedure. All this speaks about major flaws in the organizational approach towards the improvement of service quality.

If the number of beds is analyzed it can be concluded that its amount is 12.052, which corresponds to the presence of accommodation facilities for a longer period in this space. Having this in mind it should be noted that the number of beds in the accommodation facilities should be increased, and in that sense there exists space for intensifying investment activities in the Southwest Planning Region in the area of hospitality. The analysis shows that the total number of beds dominates in the hotel facilities, but it is needed constantly to increase the number of beds in hotel accommodation, as well as in the other types of accommodation facilities.

Characteristic of the accommodation facilities is that it is unequally distributed by municipalities and settlements in the region.

The indicators of the accommodation facilities are given also by municipalities according to the total number of rooms and beds. Table no. 10 contains the distribution of accommodation capacities in the region and their share in percentage in the total number. In table no. 11 given is the distribution of hotels and restaurants in the Southwest Planning Region.

Table no. 10 - Number of hospitality facilities and percentage share by municipalities

Municipality	Number of hospitality facilities	Percentage share
Vevcani	9	1,34
Debar	52	7,76
Debrca	8	1,19
Kicevo	162	24,18
Makedonski Brod	33	4,93
Struga	205	30,60
Ohrid	188	28,06
Plasnica	5	0,75
Centar Zupa	8	1,19
Total	670	100,00

Source: State Statistical Office

In the presentation of data about the situation in 2008 there is a difference that arises from the fact that the data of this year was interpreted differently in the official statistics. Namely, the situation in the municipalities is given according to the census that was directly carried out in the municipalities.

From the data in the above provided table it can be seen that most hospitality facilities does Struga have. In the total number it represents 30.6%. On second place is Ohrid with a share of 28.06%. These two municipalities have dominant place in the development suggesting a significant imbalance in the distribution of accommodation facilities.

Table no. 11 - Number of rooms and beds by municipalities in the SWPR, according to the census in the hospitality industry in 2008

	Facilities for accommodation, by municipalities, according to the census, 2008			
	Number of rooms	Share in percentage	Number of beds	Share in percentage
Total in SWPR	16.306	100	45.139	100
Vevcani	15	0,09	31	0,07
Debar	183	1,12	542	1,20
Kicevo	148	0,9	286	0,64
Makedonski Brod	20	0,12	54	0,12
Ohrid	4.538	27,83	12.422	27,52
Struga	1.731	10,62	4.868	10,78
Other non-hospitality facilities in the SWPR	9.671	59,32	26.936	59,67

In the table no. 11 represented are the number of rooms by municipalities in the Southwest Planning Region. The total share of the region in the total number of rooms registered in the Southwest Planning Region in the Republic of Macedonia is 40,7%. The percentage share of beds does not deviate much from the number of rooms per municipality. From the table it can be noticed that Ohrid and Struga have the most significant share both in the number of rooms and in the number of beds. Ohrid, according to the number of rooms, participates with 27,83 % of the total number of rooms in the Southwest Planning Region, and Struga with 10,62. The share in percentage of these two municipalities in the total number of rooms in the Southwest Planning Region is 94,5 %, while the share of the Municipality of Ohrid and Municipality of Struga in the total participation in the number of beds is 94,9 %.

Needed is a balanced development in the region, which means developing of processes for improving hospitality in all municipalities of the Southwest Planning Region.

Table no. 12 - Business entities by municipalities in the SWPR - Hotels and restaurants

Active business entities by sectors of activity according to NKD Rev.1, by municipalities, condition December 31, 2009		
	Total	Hotels and restaurants
Republic of Macedonia	70710	3938
Vevcani	105	5
Debar	428	44
Debrca	123	5
Kicevo	1404	114
Makedonski Brod	197	17
Ohrid	2691	245
Plasnica	53	1
Struga	2061	194
Centar Zhupa	57	6
Total in SWPR	7119	631

Source: Statistical Office of the Republic of Macedonia

Based on the data from Table 12 it can be calculated that the Southwest Planning Region participates with 16% of the total number of hotels and restaurants registered in the Republic of Macedonia. From them almost 70% are located in the municipalities of Ohrid and Struga. In Kicevo there are 15%, and in Debar around 7%. The number of hotels and restaurants in other cities of the Southwest Planning Region is negligible, i.e. the municipalities of Ohrid, Struga, Debar and Kicevo participate with 92% of the total number of hotels and restaurants in the Southwest Planning Region.

6.2. COMMUNAL ORGANIZATION AND INFRASTRUCTURAL EQUIPPING IN THE FUNCTION OF TOURISM DEVELOPMENT OF THE SOUTHWEST PLANNING REGION

Communal organization and infrastructural equipping which covers water supply, drainage and wastewater treatment, as well as determining locations for safe disposal of solid waste are in a direct dependence of the character of the environment in the function of development of tourism in the Southwest Planning Region. Namely, without these components of the environmental protection, it is simply not possible to develop tourism and to improve the GDP from this sector in the total GDP, as in the Southwest Planning Region, so in the Republic of Macedonia. In this sense, it is necessary to consider the characteristics of these domains.

6.2.1. WATER SUPPLY

Water supply is a major factor of the standard of living of the citizens which means that it reflects as on the level of quality of life of the receptive population, as on the visitors of this region. It is a basic premise for the vitalization of rural areas, surely through the opportunities that tourism development provides. Furthermore, an important benefit of water supply is the fact that water represents a basic attractive - motivational factor in accepting tourists in the tourism sites and facilities. Related to the quality of water, also based on is the level of satisfaction of tourists who use the attractions as basic resources for visiting the Southwest Planning Region.

The analysis shows that in the Southwest Planning Region the percentage of households which have installations and water supply are 87,2%. This level of preparedness of the Southwest Planning Region to use water supply in the function of improving the standard of living of the population which is living permanently there as well as to allow also the tourists commodity is relatively high. However, if this level is compared with the average established installations on the national level, which is 95,6 %, that indicates that there exists an open space for improving this crucial segment of the development pursuits of tourism in the region. However, into account should also be taken the fact that the coverage of the population with drinkable water is not equal, which can represent a negative circumstance in the balanced development of tourism in the region, because the share of this segment in the total water supply in the urban areas is from 70 - 90 %, while in the rural areas from 20 – 80 %.

Given that the intention for the development of tourism, especially in the context of balanced development is directed towards rural areas, this can be a problem in terms not

only of water supply as a resource of existential nature, but as a resource for using the other potentials in the function of tourism development. Water supply can be a serious obstacle in the valorization of tourism potentials that are dispersed in the region. The dilapidation of the water supply networks and the inconsistent maintenance of the water quality can also be a threatening component in the development of tourism. Water quality depends on construction and equipping of water treatment stations which in most of the environments are not representing a factor which can be termed as positive circumstance. Having in mind that tourism represents an activity with expressive seasonal characteristics it should be concluded that the surge of tourists is determined within the summer period of the year. This additionally burdens the capacity of the water system and supply of water which is one of the largest problems in tourism development. Therefore, improving the water supply, especially in rural areas where potentials exist for tourism visits, should represent a paradigmatic developmental basis.

6.2.2. DRAINAGE AND WASTEWATER TREATMENT

Drainage and wastewater treatment should be understood as a component of water supply as an important component of the environment in the function of tourism. It is even more problematic to dispose and treat the water compared of the water supply itself.

Water supply, without drainage and wastewater treatment, negatively impacts on the environment and the health of the residents, while the sensitivity of the tourists for this issue may be the dominant and limiting factor during their visit. Therefore, we consider that before any approached is done towards tourism valorization of the space, vitalization, reconstruction and revival of the phenomena and relations in the Southwest Planning Region which would be in the function of increasing the visit and the optimal use of resources, it should be approached towards processes that will provide optimal living conditions and improving the health of residents and visitors of the tourism sites and facilities. The situation shows that the possibility in this direction for improvement exists. Thus, the coverage for Struga is 100 %, Debar up to 70 % , even in Ohrid there exists a collection system for protection of the Ohrid Lake, but on the contrary in the rural areas the level is lower and ranges from 0 % where no drainage and treatment of wastewater exists, up to 80 % in certain areas, but it is obvious that the full protection is not realized. Furthermore, a large problem is that although there exist in some areas forms of treatment of wastewater of the type of septic tanks or direct outlets, it represents a risky category and can not be accepted as a solution for the permanent accepting of tourists in tourism areas. The relatively high values of 43,8 % of coverage with water treatment stations in the region, above the average of the Republic of Macedonia which is 12,5 % is primarily due to the collector system for protecting the Ohrid Lake. This is an unsatisfactory indicator of the care

that in the context of tourism development is being taken in the Southwest Planning Region. If Ohrid, Struga and Makedonski Brod are excluded, the rest of the rural areas discharge the wastewater directly without purifying in the receptors. In that way not only the surroundings of the treatment canals are being polluted, but also direct threats of the attractive sites and values are being caused. Therefore it is important as a priority in this regard to consider water treatment in a way of affirming the attractiveness of the area and to avoid conflicts in the environments suitable for tourism development.

6.2.3. SOLID WASTE

Solid waste is one of the factors that does not go out of the frame of crucial problems that arise in the regard of tourism development. This depositing has multiple meaning. Firstly, tourists as visitors may be discouraged if they visually perceive the presence of solid waste. Secondly, it is very important that the presence of solid waste has sanitary defects and hidden hazards to the visitors and the providers of services. And thirdly, very important is the absence of solid waste which has positive relation towards tourism values.

In the Southwest Planning Region the depositing of solid waste is done on local or municipal landfills. In accordance to the National Plan for Waste Management in this area, there exist 7 registered landfills, but they do not meet the basic sanitary - technical requirements for the safe disposal of waste. Furthermore absent is recycling. Moreover, in the region illegal dumps exist that pose a significant threat to the visitors in the region. They usually appear in rural areas, but often they can also be found in the urban centers, especially in the approaches or peripheral parts. Selectivity of waste in terms of number of garbage bins for disposal and containers of environmental character with different applicability are an inevitable component. They should be clearly visible in the space and it is not allowed a tourism site not to have such equipment in order to achieve any development.

6.2.4. PUBLIC TOILETS

The development of tourism in the separated sites and facilities is related to the existence of public toilets. The largest number of the attractive sites is facing the problem of this sphere. In this sense it is necessary to conduct a segmented study will give the locations, capacity and quality of the public toilets and facilities for treatment.

6.2.5. COMMUNAL URBAN EQUIPMENT

When planning the development in the municipalities and the Southwest Planning Region as a whole, or when determining specific solutions for the operation of specific types of tourism, it is necessary to take into account the design and equipping of public places, such as parks, playgrounds, urban centers and facilities with specific tourism significance (beaches, viewpoints, etc.) to be equipped with elements that ensure a comfortable and safe stay as well as appropriate activities.

In these areas it is important the equipment to include facilities for recreation, social gaming, health - recreational safety, equipment for monitoring the surrounding area and facilities for rental of accessories, beaches as spaces to be equipped with lifeguards, mountain rescuers and rangers in the highland areas and so on.

The analysis showed that a large part of these necessary content elements in the tourism areas are missing or are improperly dimensioned.

6.3. SOCIAL ACCEPTANCE OF TOURISM

Social acceptance is an important subjective factor in receptive sphere in the Southwest Planning Region. Namely, besides all the circumstances that go hand to hand with tourism development, if the social acceptance is weak, they will be largely placed in an inferior position. Since there are no direct indications for this category we approached towards the available data from the primary research. In the survey which we conducted, one of the issues concerned the degree of visitors' satisfaction of the hospitality of the hosts and service providers. The results show that not one subjects responded in the way to express a remarkable dissatisfaction of the attitude that service providers and the population had. From some respondents for evaluating the level, the largest number, i.e. 57.1 % expressed the highest level of satisfaction. While, for the second degree of satisfaction, 32 % of respondents decided. Despite such high level of satisfaction of the acceptance of tourists, there still exist areas in the region that in which visible is autarchic attitude and restrictions towards the acceptance of tourists in the households. As a conclusion imposes the fact that needed is further affirmation of the high level of hospitality and acceptance of the tourists. This indicator is an important argument in the intrusion on the domestic and international tourism market and is one of the largest tourism values of the Sothwest Planning Region.

6.4. INFORMATION AND COMMUNICATION INFRASTRUCTURE

In the Southwest Planning Region more providers of internet and communications services offer their services. In the following table are shown the providers with the type of internet connection that they offer:

Table no. 13 – Internet and communications providers that offer services in the SWPR

No.	internet Service Provider	Municipalities of SWPR	Type of connection
1.	Macedonian Telekom	In all	Telecommunications network and in some parts optical network
2.	Telesmart	Ohrid, Struga	Optical network to the municipalities, locally over other local providers
3.	Neotel	Ohrid, Kicevo Struga	Wimax, wireless transfer
4.	Sun Wireless	Ohrid, Struga	Wi Fi, wireless transfer

From the above presented table it can be generalized that the provider Macedonian telekom is covering all municipalities in the Southwest Planning Region. Also, the type of connecting is in an integrated telecommunications network by using optics in certain parts of the network.

The providers Telesmart and Sun Wireless cover only Ohrid and Struga and in addition Telesmart has an optic network towards the municipalities. After that the network is taken over by other network providers at the local level. Sun Wireless, instead, has Wi Fi wireless transfer. Neotel covers the municipalities of Ohrid, Struga and Kicevo. At the same time Wimax is being used, a wireless transfer. From the table it can be generalized that the rural municipalities and the municipalities of Makedonski Brod and Debar and not connected to the systems established by Telesmart, Neotel, and Sun Wireless.

In the interest of tourism development is the establishment and intensifying of the competition in all municipalities and cities of the Southwest Planning Region.

On the territory of the Southwest Planning Region Internet services from mobile operators such as T-mobile, One and Vip are being offered, but their quality is different, according to the quality of the network that they have created. A characteristic is that the quality of

services is lagging in the rural areas. This attitude needs to be changed and a stable system to be established in the interest of improving the quality of life and attendance of these areas.

In the municipalities in the region, there exist other local internet providers that offer their services using the facilities of large companies which are shown in Table 13.

The research that we carried out in the larger municipalities such as Ohrid, Struga, Debar and Kicevo included larger capacities for accommodation and allowed analysis for the accessibility to online services. The results are given in Table 14.

Table no. 14 – Overview of the offer of online services by accommodation facilities

Municipality	Accommodation facility	Type of connection	Accessibility
Ohrid	Metropol and Bellevue	Wi-Fi	Public spaces, free access
	Belvedere	Wi-Fi	In the whole building, free
	Sileks	Wi-Fi	In the whole building, free
	Granit	Wi-Fi	Public spaces, free access
	Tino	Wi-Fi	In the whole building, free
	Millenium palace	Wi-Fi	In the whole building, free
Struga	Hotel Drim	Wi-Fi	In the whole building, free
	Hotel Makpetrol	Wi-Fi	In the whole building, free
	Hotel Montenegro	Wi-Fi	In the whole building, free
	Hotel Biser	Wi-Fi	Public spaces, free access
Kicevo	House of arts	Wi-Fi	In the whole building, free
	Arabella	Wi-Fi	In the whole building, free
Debar	Hotel Venec	Wi-Fi	In the whole building, free
	Hotel Banjishte Spa	Wi-Fi	In the whole building, free

From the data in Table 14 it can be concluded that in all accommodation facilities, without exception, free internet is being offered. The access in some facilities is limited to the public spaces, and in the rest, there is also internet access in the hotel rooms

The analysis showed that a large number of restaurant facilities in the Southwest Planning Region provide free internet access. However, there is no free use of such internet services which is organized by the municipalities and the region in total. That pulls the fact that it is necessary the municipalities and the region as a whole to be covered with such service. It is very important to conclude that free internet is provided for organized swimming and sunbathing activities in the coastal area of the Ohrid Lake in which concession relations are established. This is one of positive circumstances that improve tourism in the region. It can be concluded that this is a successful example that should be used also in similar tourism offers within the Southwest Planning Region.

Our research also found out that by one of the providers - Sun Wireless is that it is prepared to establish a number of free internet access points under the condition the municipality to provide them free space for promoting in the promotional materials.

SWOT – ANALYSIS OF THE RECEPTIVE RESOURCES

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Existence of a built super-structure	Poor quality level of accommodation facilities from the type of LUXE - category	Subsidies and benefits	Danger of erosion of social structure in rural areas
Existence of built accommodation facilities of various types	Arbitrariness in the fields of categorization and disregard of standards	Foreign investment - penetration of international hotel chains	Poor utilization of funds
Accessibility to facilities	Failure to report tourists and occurrence of black market in the provision of tourism services	Public - private partnerships, encouraging concession arrangements	Existence of legal obstacles that sanction the existence of informal agreements in the agency activities
Existence of professional expertise for management and operational activities in the accommodation facilities	Poor link between travel agencies and direct providers of catering services	Linking with international tour operators	Threats of inappropriate behavior in tourist areas (fires)
Established categorization of accommodation units	Lack of national restaurants and services with typical local offer	Providing spaces for camps	Pollution
Involvement of accommodation facilities in the electronic communications	Poor representation of rural tourism offer	Improvement of international and connected interregional package tours	Depopulation of rural areas
Partial organizational link between travel agencies and accommodation facilities	Weak price politics according to the seasonal features	Using the pre-accession EU funds for rural development (IPA IPARD funds)	Poor accumulative condition in accommodation facilities
Existence of concession relations in the use of beach areas	Absence of allotment contracts and leases	Existence of favorable credit lines in the hotel business	Failure to comply with standards for categorization of accommodation units
Existence of communal organization and equipping of parts of the region	Occurrence of incompetent tourist guides	Establishing a system of tourism representatives	Reduction of tourist spending

Relatively high security in the use of tourism services	Little green spaces in tourism centers	Improvement of promotional activities of the hotel and tourism - agency activities	IT crime
Provided health care during the stay of tourists	Weakly built ecological infrastructure and treatment of wastewater	Using modern economic databases in the hotel business	Occurrence of criminal and inappropriate behavior in tourism
Partial categorization and standardization in the communal organization	Small capacity of camping areas and poor level of services and organization in camps	Improving the use of electronic booking and payment	
Relatively high acceptance of tourists by the service providers and receptive population	Existence of illegal landfills	Introducing eco - standards in the hotel business	
Relatively high level of professionalism and hospitality	Occurrence of illegal renting of rooms	Using renewable energy sources	
Fun content	Inadequate treatment of tourists by Taxi transport	Existing strategies and plans for marking and signalization of facilities and tourist sites	
Existence of opportunity for selective development of tourism	Occurrence of deviant behaviors of certain tourist clientele	High level of interest and rapid flow of information - globalization of world trends	
Sustainable level of production and distribution of biologic proper organic food	Low-cost tourist clientele	Appearance of interest of organizational factors for additional education in tourism LLL (Lifelong Learning)	
	Lack of recreational facilities in the hotel and catering facilities		
	Deficiency of public toilets and sanitary facilities		

7. ANALYSIS OF DEVELOPMENT INDICATORS

As the basic development indicators of tourism in the Southwest Planning Region we will include the volume and dynamics of attendance, expenditure, qualitative characteristics of tourism products, spent overnights, accommodation facilities, employment and distributed revenues in tourism. Given the fact that there exists an unbalanced development of the municipalities, the development indicators will also be analyzed by municipalities. The attendance in the Southwest Planning Region represents an important development indicator because of the fact that it expresses the accessibility to the region, the organization of tourism activities, use of resources and the satisfaction of the presence in this area.

Having in mind the relations that exist between the realized overnights and the visits of the Southwest Planning Region also these indicators in the Republic of Macedonia, we can give the percentage share in this regard.

The ratio between the realized overnights and visits allows us to determine the dynamics of the average stay of tourists in the region.

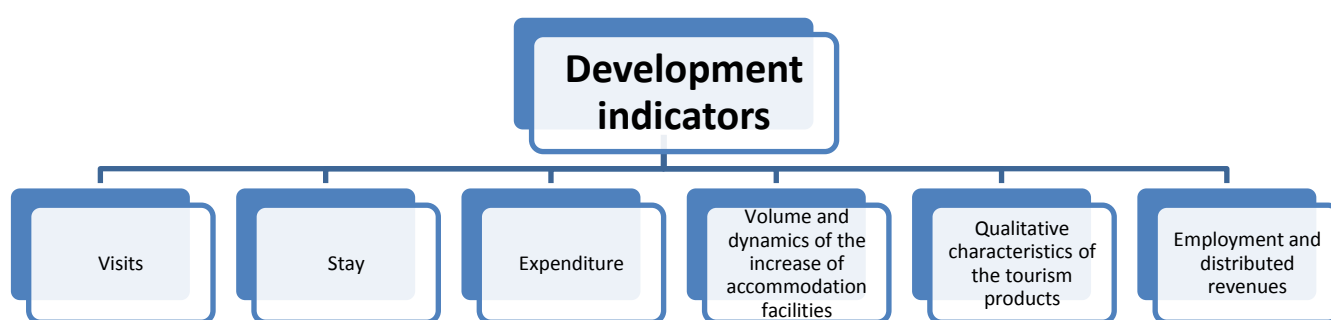


Chart no. 8 – Development indicators

The attendance of the Southwest Planning Region will be presented with tables and graphics.

7.1. ARRIVALS AND STAY

In the following table is shown the volume, structure and dynamics of tourists' visits for the last 7 years.

Table no. 15 - Volume, dynamics and structure of tourists' visits

Year	Number of domestic tourists	Index base 2006	Number of foreign tourists	Index base 2006	Total	Index base 2006
2006	160.960	100,00	72.258	100,00	233.218	100,00
2007	175.254	108,88	80.003	110,72	255.257	109,45
2008	193.662	120,32	83.007	114,88	276.669	118,63
2009	170.127	105,70	87.353	120,89	257.480	110,40
2010	154.731	96,13	79.934	110,62	234.665	100,62
2011	147.877	91,87	101.869	140,98	249.746	107,09
2012	140.993	87,60	110.469	152,88	251.462	107,82

In the table shown are the data on the number of the visited domestic and foreign tourists, and the total number of visited tourists in the Southwest Planning Region in the period of 2006-2012. For each group of tourists calculated is also the index according to the base year of 2006.

The total number of tourists shows that the dynamics which are relatively higher than the analyzed base year. In all analyzed years the index is greater than 100 which means that there are positive performances.

For the domestic tourists in the period 2006-2008 there is an increase of 20%, and then comes a period of decline. The decline in 2012 compared to 2006 is 12.4% or an index of 87.6% of the index in the last analyzed year. These developments show that it is necessary to adjust the domestic tourism offer towards the domestic tourism clientele. Despite these measures, the reason should be sought in the drastic reduction of prices of tourism services in the neighboring countries in the non-seasonal period as is the case with the Republic of Greece and the relatively high prices which can not be fully accepted by the decline of the standard of living in the Republic of Macedonia.

For the foreign visitors noticeable is the significant increase in tourism arrivals. Namely, the highest index was achieved in 2012 and was 152.88%, which means an increase of over 52%. This is due to the measures by the Government of the Republic of Macedonia which have been undertaken in the sphere of subsidizing incoming tourism and the promotional activities in this domain. In addition, a large number of tourists from abroad are present due

to the lower prices of the package tours and the organized approach in the marketing of the tourism offer of the region.

Table no. 16 - Volume, dynamics and structure of the realized overnights

Year	Realized overnights of domestic tourists	Index base 2003	Realized overnights of foreign tourists	Index base 2003	Total	Index base 2003
2006	1.052.271	100,00	192.216	100,00	1.244.487	100,00
2007	1.127.957	107,19	223.849	116,46	1.351.806	108,62
2008	1.202.890	114,31	249.315	129,71	1.452.205	116,69
2009	1.077.229	102,37	248.963	129,52	1.326.192	106,57
2010	949.524	90,24	219.300	114,09	1.168.824	93,92
2011	880.469	83,67	328.718	171,01	1.209.187	97,16
2012	836.097	79,46	362.163	188,41	1.198.260	96,29

The total number of nights, unlike the visits shows significant fluctuations in the dynamics. In the base year in the period until 2009 exists an increase in the index of stay. However, already in 2010, there is a sharp reduction of this structural indicator, so that in the remaining years the index is below the level from 2006. Such dynamics is due to the further reduction of the stay of domestic tourists. If the data for this conjuncture are inspected it will be seen that in 2012 the index dropped to 79,46 compared to the analyzed base year. The indicators that led us to the conclusion that the purchase power of the domestic population is reducing here it expresses in more detail. It is therefore necessary not only to improve the tourism offer of the attractions themselves, but also to put efforts into the improvement of services that would be acceptable for the domestic tourism clientele.

In this context it should be taken into account also the price policy that should be adapted to the capabilities of the domestic clientele in order to realize a longer stay in the Southwest Planning Region.

The foreign tourism clientele achieves a trend of increased number of overnights that represents an outstanding characteristic in the context of the benefits they use. These results have a direct impact on the country's balance of payments and the participation of foreign currency assets in the GDP of the Republic of Macedonia.

Table no. 17 - Percentage share of the SWPR of the nights spent in the Republic of Macedonia by years

Overnights of tourists, in the SWPR, by years							
	Total						
	2006	2007	2008	2009	2010	2011	2012
Republic of Macedonia	1.917.395	2.019.712	2.235.520	2.101.606	2.020.217	2.173.034	2.151.692
Southwest	1.244.487	1.351.806	1.452.205	1.326.192	1.168.824	1.209.187	1.198.260
Percentage share	64,91	66,93	64,96	63,10	57,86	55,65	55,69

The percentage share of the number of nights spent in the Southwest Planning Region compared to the total number of nights spent in the Republic of Macedonia in the examined period has an average value of 61,3 in the years analyzed, which is a high percentage. The percentage share of the number of nights spent in the Southwest Planning Region has a downward trend in the examined period in relation to the total number of nights spent in the Republic of Macedonia. However, the Southwest Planning Region in all examined years participates with more than 50% of the total number of nights spent.

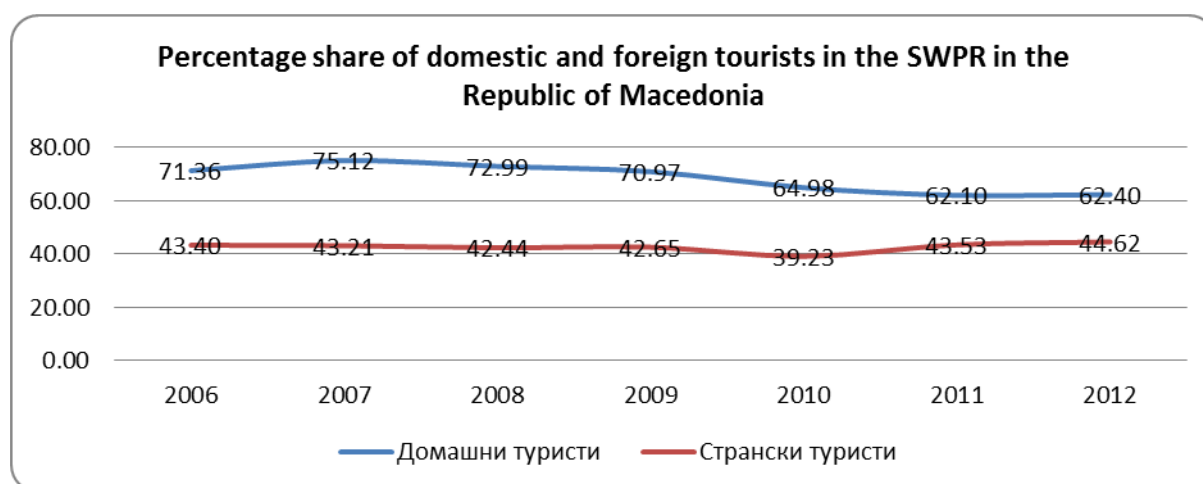


Chart 9 - Percentage share of domestic and foreign tourists by years of the SWPR in the total number of nights spent in the Republic of Macedonia

On chart 9 shows the percentage share of domestic and foreign tourists who realized overnights in the Southwest Planning Region compared to the total number of realized overnights in the Republic of Macedonia. The percentage share of domestic tourists is

declining over the years, while the percentage share of foreign tourists is maintained at an average level of 42,7%. The decline in the share of domestic tourists in the period 2006-2012 is almost 9%.

This shows that the Southwest Planning Region in the field of tourism in the Republic of Macedonia has crucial significance, so that it gives an identification of the movements not only in the domain of revenues, but also in improving the GDP of this sector.

7.1.1. THE PLACE OF THE SOUTHWEST PLANNING REGION IN THE NIGHTS SPENT COMPARED TO THE OTHER REGIONS IN THE REPUBLIC OF MACEDONIA.

Recognizing the place and role of the Southwest Planning Region in terms of tourists' stay is contained in the percentage relations not only towards the Republic of Macedonia as an integrated tourism destination, but also towards the other planning regions in the Republic of Macedonia. These indicators are presented in the following graph:

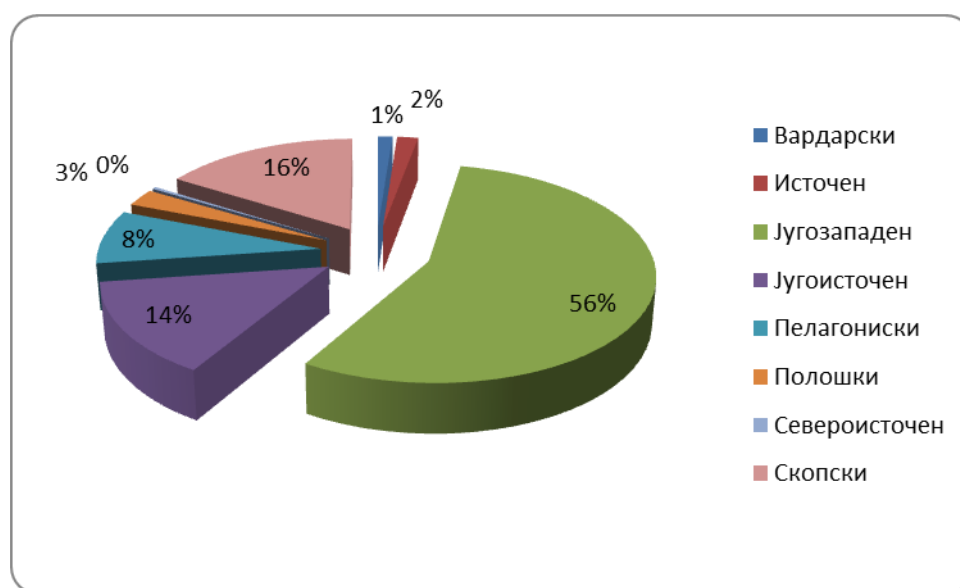


Chart 10 - Distribution of the number of nights spent by regions in the year 2012

With the chart 10 the percentage share of all planning regions in the total number of nights spent by tourists in the year 2012 is shown.

As previously stated, the Southwest Planning Region in the total number of tourism arrivals in the Republic of Macedonia accounts for 55,69% in 2012. In second place with 16.1% is the Skopje Planning Region of the total number of nights spent in the Republic of Macedonia.

The Southeast Planning Region participates with 14,2% of the total number of nights spent in the Republic of Macedonia in 2012. Other regions noticeably lag behind the Southwest Planning Region in this regard.

7.2. AVERAGE STAY OF TOURISTS AND ITS DYNAMICS IN THE SOUTHWEST PLANNING REGION

The average stay of tourists in the Southwest Planning Region expresses the level of functionality of the resources of different nature. The relative increase in the average stay expresses the improvement of the content elements in accepting tourists as guests.

Table no. 18 - Average stay of tourists in the SWPR by days

Year	Average stay of domestic tourists	Average stay of foreign tourists	Average stay of the total number
2006	6.54	2.66	5.34
2007	6.44	2.80	5.30
2008	6.21	3.00	5.25
2009	6.33	2.85	5.15
2010	6.14	2.74	4.98
2011	5.95	3.23	4.84
2012	5.93	3.28	4.77

From the indicators in the table it can be seen that the average stay of the total number of tourists in the analyzed period the decline relatively. Thus, in 2006, tourists stayed an average of 5,34 days. In the next period continuous reduction reaches a level of 4.77, which is a drop of about one day.

An apparent reduction of the average length of stay has been observed in domestic tourists. That from the base year in 2006 when they stayed 6,54 days decreased on a level of 5,93 in 2012. Throughout the analyzed period noticeable is the permanent reduction in the average length of stay.

Pleasing is the indicator that the average stay of foreign tourists has increased although according to the indicators it is almost twice lower compared to the performance of the

domestic tourists. But in 2012 the average stay of foreign tourists was 3,28 which was significantly increased compared to the first analyzed year in which foreign tourists stayed only 2,66 days

7.3. ACCOMMODATION FACILITIES AS A DEVELOPMENT INDICATOR

Besides the dynamics of the tourism arrivals and tourism stay in the area Southwest Planning Region, development can be followed by movement and relating of the constructed in this activity conduct.

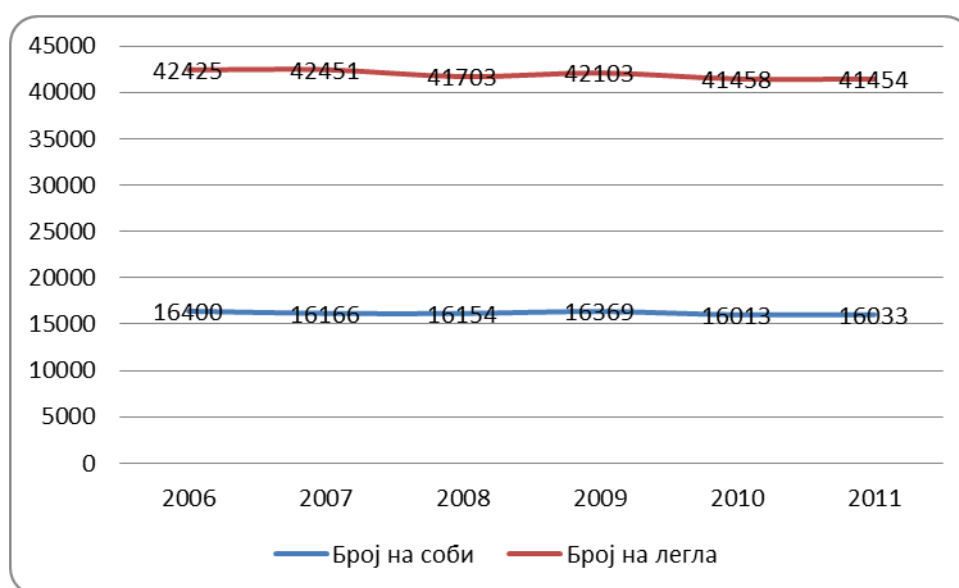


Chart no. 11 - Capacities in the SWPR by years

The number of beds and rooms in the Southwest Planning Region decreased during the period 2006-2011 by 2.5%. The Southwest Planning Region according to the accommodation facilities in the total number of accommodation facilities in the Republic of Macedonia participates with an average of approximately 60%, which is an important capacity indeed.

Tourism spending is an indicator that largely determines the GDP of this sector in the Southwest Planning Region. We determined this indicator in two ways: one was by the indicators of the World Tourism Organization corrected at the level of prices in the Republic of Macedonia, where we determined that the average spending in the region in the analyzed period is approximately \$45 USD per night. The approximative value also coincides with the conducted survey, where approximately the same values of consumption were obtained. Bearing this in mind we can present the tourism spending in the following table.

Table no. 19 - Realized incomes according to the average spending of \$45 USD

Year	Realized incomes from domestic tourists	Inex base 2003	Realized incomes from foreign tourists	Inex base 2003	Total	Inex base 2003
2006	47.352.195	100,00	8.649.720	100,00	56.001.915	100,00
2007	50.758.065	107,19	10.073.205	116,46	60.831.270	108,62
2008	54.130.050	114,31	11.219.175	129,71	65.349.225	116,69
2009	48.475.305	102,37	11203335	129,52	59.675.364	106,57
2010	42.728.580	90,24	9.868.500	114,09	52.597.080	93,92
2011	39.621.105	83,67	14.792.310	171,01	54.413.415	97,16
2012	37.624.365	79,46	16.297.335	188,41	53.921.700	96,29

From the table overview it can be seen that tourism spending by the domestic tourists is noticeable declining so that the index is 79,46 compared to the analyzed base year – 2006. In terms of the total estimated revenues the dynamics has stagnant characteristics, so that the index in 2012 is 96,29 which is a decrease of about 3,5 percent compared to the base year.

The state intervention in terms of subsidizing foreign attendance reflects on the increase of tourism spending of this category. From the table overreview it can be seen that the development momentum is impressive, in that way that among the foreign tourists the increase of spending compared to the the base year grows to over 88 %. These are optimistic trends regarding the consumption of foreign tourists and represent an indicator that in the future we can expect an increase in spending and an inflow of foreign currency.

7.4. DEVELOPMENT INDICATORS BY MUNICIPALITIES

The perceiving of development in the region means using parameters relating to the municipalities in which the attendance is being realized and stay in which such statistical records exists. Therefore this is related to volume dynamics and structure, as for the foreign, so for the domestic tourists.

Development indicators by municipalities show us the imbalance of tourist arrivals and stay of the region in a spatial sense.

7.4.1. CHARACTERISTICS OF THE STAY IN THE MUNICIPALITY OF OHRID

The data portraying the development through this indicator are represented in the chart no. 12.



Chart no. 12 - Number of arrived domestic and foreign tourists in Ohrid by years

In chart 12, given are the values of arrived tourists in Ohrid. One series is for the domestic tourists and one for the foreign. From this chart evident become several aspects:

- The number of domestic tourists is significantly greater than the number of foreign tourists during the reviewed period. However this difference is has reduced in recent years. This means that it is a positive trend, since the increase of the number of foreign tourists represents a strategic decision of each country, spatial or administrative entity.
- In 2001, there is a sharp decline in the domestic, and especially in the foreign tourists. The percentage of arrived foreign tourists in Ohrid is only 20,4% compared to the number of arrived tourists in the year 2000. This ratio for the domestic tourists is 56,2%. This is due to the war clashes during this year on the territory of the Republic of Macedonia. Already in 2002 the number of arrived domestic tourists is 89,84% compared to the number of arrived tourists in 2000, but for the foreign tourists there need four years to pass for the percentage compared to the year 2000 to climb to 88%.

- The number of domestic tourists by years is decreasing while the number of foreign tourists continuously increases.
- In 2001, evident is a significant decline in the number of tourists both the foreign and domestic tourists, while the period of the return of tourists is also evident
- The ratio of domestic to foreign tourists in the year 2000 was 2,75, in 2012 – 1,20, and for the first seven months of 2013 the ratio is 0,91. If these trends continue, the next year it is expected the number of foreign tourists to exceed the number of domestic tourists.

7.4.1.1. Characteristics of tourists' realized overnights in the Municipality of Ohrid

The realized overnights by years are given in the following chart:



Chart 13: Nights spent of domestic and foreign tourists in Ohrid by years

Source: State statistical office

In chart 13 given are the numbers of the realized overnights for domestic and foreign tourists in Ohrid by years.

Similar to the number of arrived domestic and foreign tourists, the number of realized overnights of domestic tourists declines, while the number of nights spent of the foreign tourists is continuously increasing. So, in 2012 the number of overnights of foreign tourists reached 248.358 which is the highest level in the analyzed period. That is almost a twofold increase compared to 2000 when realized were 153.762 overnight stays. This tendency has

positive implications in the future development period of Ohrid as the central municipality of this sector in the Southwest Planning Region.

7.4.1.2. Dynamics of the average stay of domestic and foreign tourists in the municipality of Ohrid

The relations between the realized overnights and the visit by the domestic and foreign tourists in the analyzed period clearly show the development trends in the municipality. These indicators are presented in the following chart:



Chart 14 - Average stay of the tourists in the Municipality of Ohrid

The average stay of tourists in the Municipality of Ohrid has some decrease in the number of days. So, from the year 2000 when an average stay of 6.4 was recorded, it decreased to 5.8 in 2012. What is worrying is the fact that the number of overnight stays in 2012 is lower than the number of realized overnights in 2000 and that for 30%. This character of reducing the average days of stay suggests that it is necessary to improve tourism offer in its contents and quality in order to improve the interest among the domestic tourists for longer stays.

From the above presented it can be concluded that the interest for visiting of Ohrid for the domestic guests continuously is decreasing, especially in the last five years. Only in the last five years the number of domestic tourists decreased by almost 38.000 visitors per year, or the percentage reduction is 27,5 %. The same applies to the number of realized overnights for the domestic tourists, and the average number of nights spent during the reviewed period is decreased by 16.8 % as well.

What is particularly important for the domestic tourists is the fact that the average stay of domestic tourists is almost 3 nights longer than the average stay of foreign tourists.

This tendency suggests that it is necessary to approach to shaping the tourism offer which will be in the direction of acceptance by domestic tourists.

For the foreign tourists the average stay has smaller fluctuations in comparison to the performances by the domestic tourists. In the year 2000 the average number of realized overnights by foreign tourists is 2,73, in 2012, that value is 2,97, and for the first seven months of 2013 it is 2,7.

For the foreign tourists significant is the continuous increase, both of the number of incoming tourists, and the number of realized overnights as well. In the last five years the number of foreign tourists increased by 21.800 tourists or the percentage increase is 35,35%. The percentage increase in the average number of nights spent in the last 5 years is 7,4%.

This tendency in the average stay of foreign tourists has positive influence on development, because on this is based the increase of the gross domestic product of Ohrid in this sector.

7.4.2. CHARACTERISTICS OF THE TOURISM STAY IN THE MUNICIPALITY OF STRUGA

The municipality of Struga together with the municipality of Ohrid is the leading municipality in the tourism trade of the Southwest Planning Region. Even in the number of hospitality facilities it has a leading development role. It is therefore very important to analyze the tourism stay of this municipality. The volume, structure and dynamics of tourism visits of the Municipality of Struga are given in the following chart.

In chart 15 given are the number of arrived tourists in Struga by years, one series for the domestic and one series for the foreign tourists.



Chart 15: Number of arrived domestic and foreign tourists in Struga, 2000-2012

From the chart several aspects can be observed which influence the development of tourism in the Municipality of Struga such as:

- Evident is the drastic decline of the number of domestic and foreign tourists in the year 2001, as a recorded year where a structural break in the series exists. Unlike the Municipality of Ohrid where already in 2002 the number of domestic tourists returns to the value of almost 90% compared to the year 2000, in the Municipality of Struga in 2003 a number of arrived domestic tourists in the proportion of about 85% was observed.
- The number of domestic tourists, similar to the Municipality of Ohrid shows a continuous decline from 2004 to 2012. Only in the last five years the number of domestic tourists in the Municipality of Struga decreased by more than 19% in relation to 2000, the decline is greater than 40%. Among the domestic tourists there is a decline of the number of domestic tourists also in 2006, which can represent a structural change in the series.
- Such reduction in the number of domestic tourists should be overcome by expanding the opportunities within the tourism offer.
- For the foreign tourists also exists a significant decline in the number of tourists in 2001. Already in 2006 the number of arrived foreign tourists in Struga is 91% compared to 2000. Unlike the domestic tourists, the number of foreign tourists with small variations is continuously growing and. in 2011 exceeds the number of arrived tourists compared to the year 2000

- In the year 2000, the number of arrived foreign tourists is less than 36% compared to the number of arrived domestic tourists, while in 2012 this ratio is greater than 71%. For the first seven months of 2013 the ratio foreign/domestic tourists is in favor of the foreign tourists, i.e. the number of domestic tourists is 15.273, and the number of foreign tourists i 16.197
- These developments among the foreign tourists are positive and are similar to the developments in the number of arrived foreign tourists in Ohrid.

7.4.2.1. Characteristics of realized overnights of touristst in the municipality of Struga

Tourism stay in Struga in this analyzed period is given in the following chart:

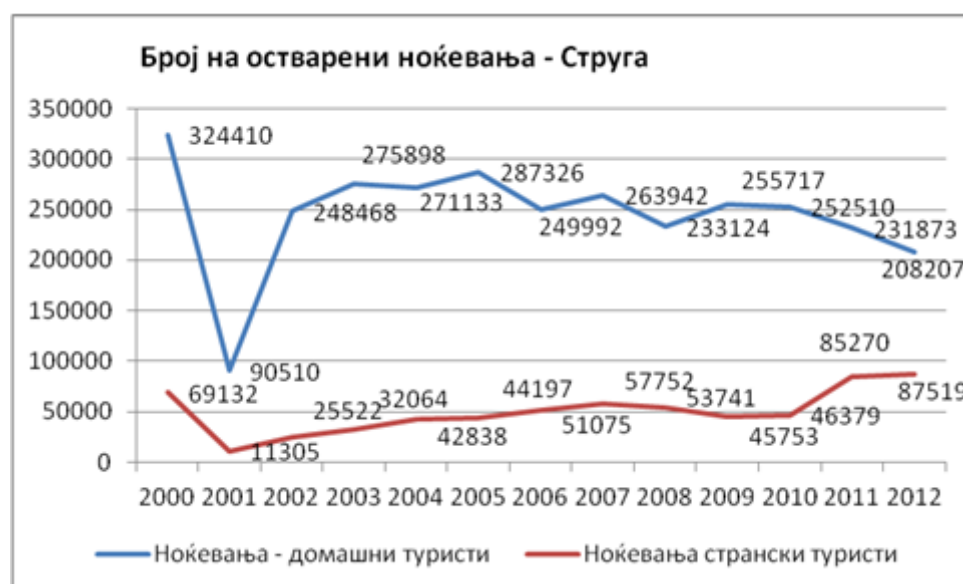


Chart 16: Number of nights spent in the Municipality of Struga by years

The appearance of the chart on the number of realized overnights for the Municipality of Struga has a similar shape to the chart on the number of arrived tourists. The difference is in the average number of realized overnights for the domestic and foreign tourists. Similar as with the situation of realized overnights in the Municipality of Ohrid, in Struga as well, the total number of realized overnights in 2012 is for 25% lower than the total number of realized overnights in the year 2000.

7.4.2.2. Average stay of tourists in Struga

In the chart 17 given is the average number of realized overnights per tourist for the period 2000-2013, for the domestic and foreign tourists. Unlike the Municipality of Ohrid, where the average number of overnights for the domestic tourists declines over the years, the Municipality of Struga has a trend of increasing. This means that there is progress in the quality of services that keeps the attention of domestic tourists.



Chart 17: Average number of overnights per tourists for the Municipality of Struga

On average during the observed years, the number of realized overnights for the domestic tourists is larger by 3 compared to the foreign.

The average number of overnights for the foreign tourists is increasing over the years, but the same thing also happens with the domestic tourists.

7.4.3. CHARACTERISTICS OF THE ATTENDANCE OF THE MUNICIPALITY OF DEBAR

For the Municipality of Debar conducted is an analysis of the basic development indicators. The analysis of the volume, dynamics and structure of the attendance is presented in the following chart. Given that the series is incomplete (data is missing for the months when the number of visitors was very small) only a descriptive analysis of these data has been conducted.

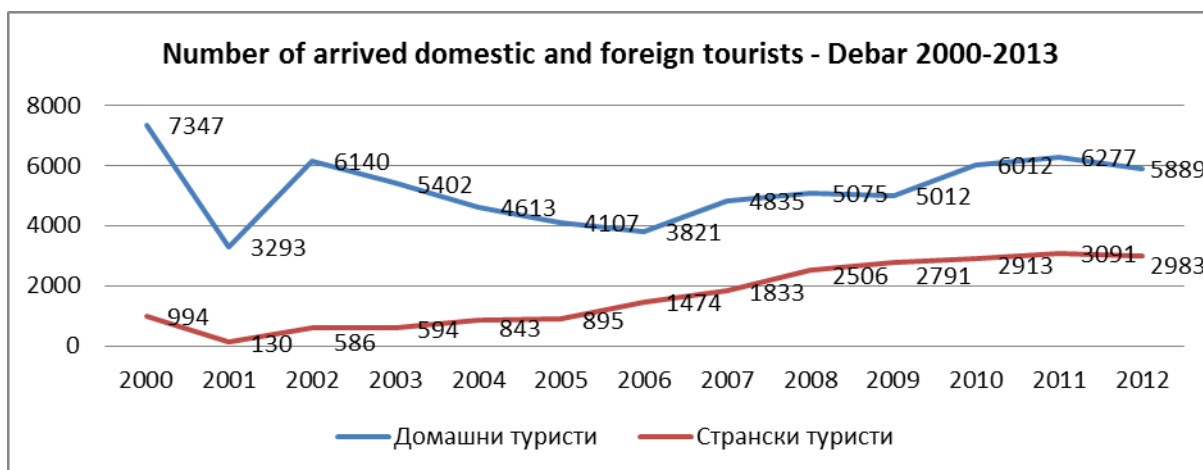


Chart 18 - Number of arrived domestic and foreign tourists in Debar by years, 2000-2013

- Over the years the number of domestic tourists is decreasing, while the number of foreign tourists significantly increases.
- In 2001, there is a sharp drop of the number of domestic and foreign tourists. Although already in 2002 the number of domestic tourists is 83.6% of the number of arrived domestic tourists in Debar in 2000, their number shows a decline up to 2006 after which is starting an increase in the number of domestic tourists, but the value of 2000 has still not been exceeded.
- For foreign tourists after the decline in the year 2001 there is a continuous increase. In 2005 the number of arrived foreign tourists in Debar is 90% of the number of arrived tourists in 2000, and in 2012 the ratio of arrived foreign tourists compared to the year 2000 is 3:1.

7.4.3.1. Characteristics of the realized overnights of tourists in the municipality of Debar

The number of realized overnights for domestic and foreign tourists in the Municipality of Debar is presented in the following chart:



Chart 19 - Number of realized overnights in Debar for domestic and foreign tourists by years

From the chart it can be observed that from the year 2002 till 2012 there is a continuous increase in overnight stays among the foreign tourists. Such dynamics have optimistic character for future development forecasts and represent a good base for improving tourism in Debar. The number of overnight stays in 2002 was 3.892, while in 2012 it had risen even to 22.541, which is 5.8 times larger realization. Among the domestic tourists present is some reduction in 2006, for after to come to a continuous increase in the number of realized overnights. That number from 29.135 had increased to 43.931 overnights. That means that the quality of services has contributed to a significant rise in the tourism stay also of the domestic tourists.

7.4.3.2. Average stay of tourists in the Municipality of Debar

In contrast to the analyzed number of realized overnights in the municipalities of Ohrid and Struga where a significant difference between the average number of realized overnights for domestic and foreign tourists was present, in the Municipality of Debar that difference does almost not exist. In the period 2002-2012, the average number of realized overnights for the domestic and foreign tourists moves around the value of 7. In 2012 in the Municipality of Debar realized were 8% more overnights compared to the initial year of 2000



Chart 20 - Average number of realized overnights in Debar for domestic and foreign tourists

In the Municipality of Debar a positive trend exists both in the number of domestic and the number of foreign tourists, as well as in the number of realized overnights for domestic and for foreign tourists. For the foreign tourists significant is also the increase of the average number of realized overnights per tourist.

7.4.4. CHARACTERISTICS OF THE ATTENDANCE IN THE MUNICIPALITY OF KICEVO

The Municipality of Kicevo is the last of the most important four municipalities in the Southwest Planning Region, for which the analysis of development indicators is made: number of arrived tourists and number of realized overnights for domestic and foreign tourists.

On chart 21 represented is the number of arrived domestic and foreign tourists by years, for the same period 2006-2013.



Chart 21 - Arrived tourists in the Municipality of Kicevo by years

From the data shown in chart 21 it can be observed that the number of arrived domestic tourists is decreasing in the period 2007-2012. In 2012 the number of arrived domestic tourists is for about 43.8% less than the number of arrived domestic tourists in the year 2007.

For the foreign tourists there is an increase of the number of arrived tourists especially in the last analyzed year - 2012. In the whole analyzed period, the number of arrived foreign tourists is significantly lower than the number of arrived domestic tourists. This ratio ranges from 7.38:1 in 2006 to 2.03:1 in 2012.

The decrease has a negative tendency of attendance and therefore it is necessary to improve the content of tourism offer and improving the tourism offer according to the requirements of the foreign clientele.

7.4.4.1. Characteristics of the realized overnights of tourists in the Municipality of Kicevo

The realized overnights in the Municipality of Kicevo are given in the following chart:



Chart 22 - Number of realized overnights for domestic and foreign tourists – Kicevo 2006-2013

The number of realized overnights during the years for the domestic tourists is substantially decreasing. So, in 2006 it was 3.831, while in 2012 it was 2.075. That means that it is necessary to approach to a thorough improvement of the tourism offer for the domestic tourists.

For the foreign tourists there can be observed an increase in the number of realized overnights, whereas again in 2012 there is a significant jump in the number of realized overnights of foreign tourists, whereas that number is greater than the number of realized overnights of the domestic tourists. However, it can be concluded that these are modest results which should be improved.

7.4.4.2. Average stay of tourists in the Municipality of Kicevo

These parameters that reflect the development of service quality is presented in the following chart:

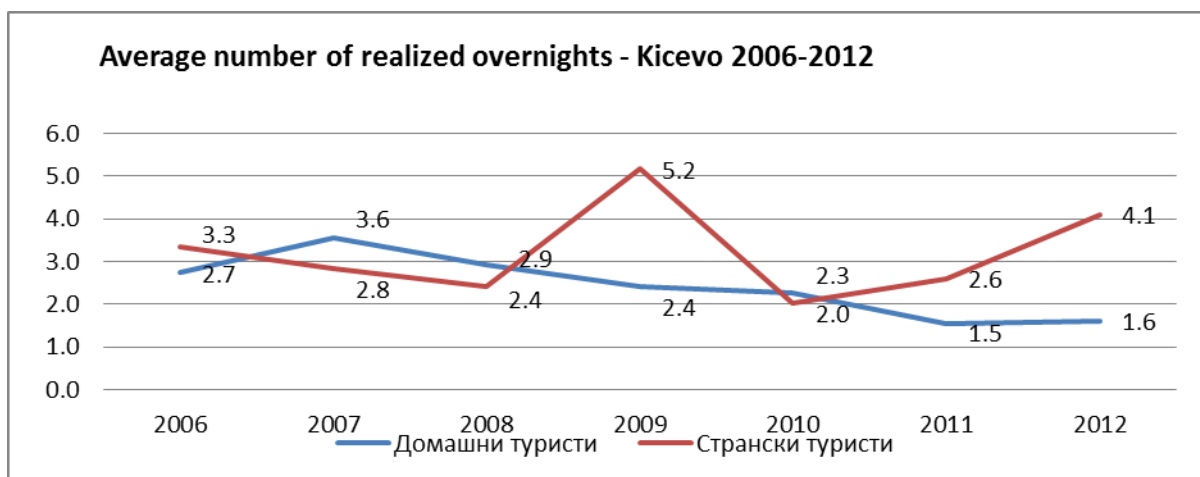


Chart 23 - Average number of realized overnights for domestic and foreign tourists by years

In contrast to the municipalities of Ohrid and Struga where the number of realized overnights of domestic tourists is significantly higher than the number of realized overnights for the foreign tourists, in the Municipality Kicevo has another tendency. The average number of realized overnights for domestic tourists has a tendency of declining, while for the foreign tourists it has a tendency of increasing.

7.5. VOLUME AND DYNAMICS OF ACCOMMODATION FACILITIES

The volume and dynamics of accommodation facilities expresses tourism construction. In order to determine the relation between volume and dynamics of accommodation facilities in the Southwest Planning Region, given is also a parallel of these developments in the Republic of Macedonia.

The following table contains the mentioned indicators.

Table no. 20 – Accommodation capacities in the SWPR by years

Accommodation capacities, by years												
	2006		2007		2008		2009		2010		2011	
	Number of rooms	Number of beds	Number of rooms	Number of beds	Number of rooms	Number of beds	Number of rooms	Number of beds	Number of rooms	Number of beds	Number of rooms	Number of beds
Republic of Macedonia	26.503	71.021	26.246	70.898	25.952	69.097	26.390	69.561	26.189	69.102	26.448	69.737
Southwest Planning Region	16.400	42.425	16.166	42.451	16.154	41.703	16.369	42.103	16.013	41.458	16.033	41.454

Given the importance of the movement of the volume of accommodation facilities in the region, the indicators presented in table no. 20 are aimed at understanding the tendencies. From the table it can be seen that the number of rooms and number of beds are stagnant features. The number of rooms in the Southwest Planning Region in 2006 was 16.400, while in 2011 it was 16.033. Among the number of beds in 2006 there are 42.425, and in 2011, 41.454. This means that it is necessary to improve this sector. The activities of the Government in tourism policy should have positive significance not only regarded to the tendencies of growth, but also to the spatial distribution of these parameters.

7.6. QUALITATIVE CHARACTERISTICS OF TOURISM PRODUCTS

Quality of tourism products is the most important component in the distribution of the tourism offer in the Southwest Planning Region. The expert team, observing the situation in this area, can conclude that in the past period most of the package tours had outgoing character and related to offers that are out of the Southwest Planning Region and the Republic of Macedonia. Usually these are package tours for tourism stay in Greece, Albania, Bulgaria and Turkey. In last years of introducing the measures of subsidizing foreign attendance in the Republic of Macedonia this approach is slowly changing in that way that present are package tours of two types. One refers to the elements of the offer that are in the region, and the other is related to combined tours with countries outside the Republic of Macedonia and the region. As an example can serve the tours that were performed for Polish and German tourists in Albania and in the Southwest Planning Region.

In order the expert team to be able to provide more appropriate conclusions is also using the ratings for the developing indicators that the professional offices gave in all the municipalities. The evaluation of the quality of the package tours that are carried out in the region by the travel agencies has the lowest average score of 2.12 out of possible 5. This coincides with the views and opinions of the expert community. However, the analysis of the interviews of the other stakeholders, of the business sector, shows a slightly higher score on this question and is 3.20. In any case, this assessment indicates that it is necessary to further improve the quality of tourism products in the Southwest Planning Region. In order to realize this meaning it is needed to have a permanent education and training activities of the creators of tourism products as well as establishing a functioning network of all stakeholders who will include all components of the tourism offer.

Given that in the survey we concluded that the number of domestic tourists permanently reduced, the attention should be directed towards the creation of tourism products intended for domestic tourists. The analysis in this area shows that the number of such created tourism products is quite small.

7.7. EMPLOYMENT

Employment represents a development indicator which tracks the increase of the volume of accommodation facilities, tourism visits and stays. In the region, the total number of employees in the hospitality sector is 2002 employed by the census for statistics of 2008.

Table no. 21 - Number of employees in hospitality capacities by municipalities in the

Employees in hospitality by municipalities, according to the Census for hospitality, 2008		
	Number of employees	Number of employees (%)
Vevcani	32	1,45
Debar	128	5,81
Kicevo	443	20,12
Makedonski Brod	75	3,41
Ohrid	906	41,14
Struga	591	26,84
Centar Zupa	18	0,82
Plasnica	9	0,41
Total	2.202	100,00

Source: State Statistical Office, www.stat.gov.mk

The Southwest Planning Region according to the total number of employees in hospitality, according to the census of hospitality in 2008, participates with 13.31%. Ohrid and Struga participate with 69.37%, while Ohrid, Struga, Debar and Kicevo with 94.25% of the total number of hospitality facilities in the Southwest Planning Region.

III CLASSIFYING OF RESOURCES

Classifying of resources is a methodological procedure of systematization which is related to the optimal use of the available potentials. According to the already established division, the analysis will include the following categories.

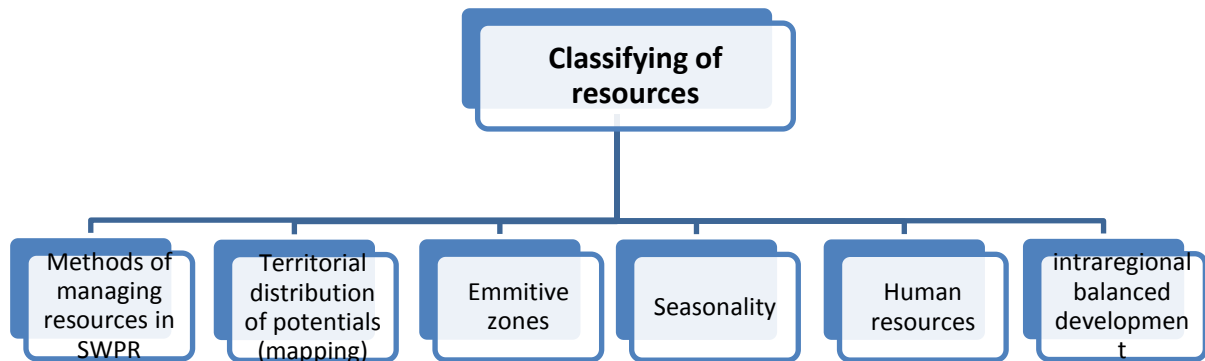


Chart no. 24 – Classifying of resources

1. METHODS OF MANAGING THE RESOURCES IN THE SOUTHWEST PLANNING REGION

Resources are defined as elements that represent opportunities for improving tourism. They often cover a wider spatial unit of the region. Such is the case with the National Park Galicica. In addition the resources can be in the function of different stakeholders as a common good. Because of this, it often comes to mixing of responsibilities in managing the resources.

In the area of natural heritage management it can be at various vertical and horizontal levels. The levels are ranging from authorities of the state, local governments and private property. It is very important in terms of the action plans to accurately define the ownership of each segment separately, in order to find models of optimal management of the specific resource in the function of tourism development. For example, it is very important the management of beaches opposed to the managing fishing activities and water operating. Models of combined management are very important because in this way unambiguously concessioning and other forms of public - private partnership are determined.

Cultural heritage as a very important resource for the development of tourism, has divided authority in management. That usually depends on the level of values contained in each

resource separately. Among the cultural heritage, differences in the ownership and responsibilities for the protection may arise. For example, religious communities are the dominant entity who owns cultural heritage on one hand, while on the other hand the protection is a care of the state.

For example, for the category of the most important heritage cares the state. For some segments of the cultural heritage also the local government can take care, and some can even be under the authority of private parties.

An essential factor for the development of tourism, especially, cultural tourism, is to harmonize the interests of protecting the heritage and development of tourism. Without the cooperation of all stakeholders (cultural, religious communities, tourism agencies, NGOs) there is no development of tourism. A recommendation of the expert team is the managing of resources to be systematized in a way that for any particular segment or facility a management plan for managing in the function of tourism to be developed.

2. TERRITORIAL DISTRIBUTION OF POTENTIALS (MAPPING)

For the territorial distribution of potentials characteristic is the uneven distribution in the region. Most resources that have a reputation on an international level are located in the municipalities of Ohrid and Struga. The municipalities Kicevo and Debar have development potentials that can be improved and to receive a significant tourism value. Characteristic for the region is that the Municipality of Vevcani is becoming a recognizable tourism destination. Namely, a large number of tourists staying in Ohrid and Struga are directing to this area. The intensification of accommodation facilities in this municipality would contribute to a faster development of tourism. The other municipalities have potentials that seek larger engagements and investment activities, as in the field of networking, so in the equipping of tourism localities and facilities to be included in the tourism offer.

3. EMMITIVE ZONES

Emmitive zones represent spatial entities outside the Republic of Macedonia from where tourists come to the Southwest Planning Region. Their presence is recorded in the municipalities in which the greatest tourism trade is achieved. Given that foreign tourists were recorded by receptive areas, the analysis will be treated accordingly.

Emmitive zones are obtained based on the analysis of foreign visits by country of origin by municipalities. Having in mind that emmitivity belongs to those countries that had the

highest turnover and represent traditional visitors of the municipalities, the analysis will encompass precisely the movements from these spatial entities.

3.1. Foreign tourists by country of origin – Ohrid

Emmitivity is contained in the largest attendance of foreign tourists in Ohrid, the number of foreign tourists is provided in the following chart.

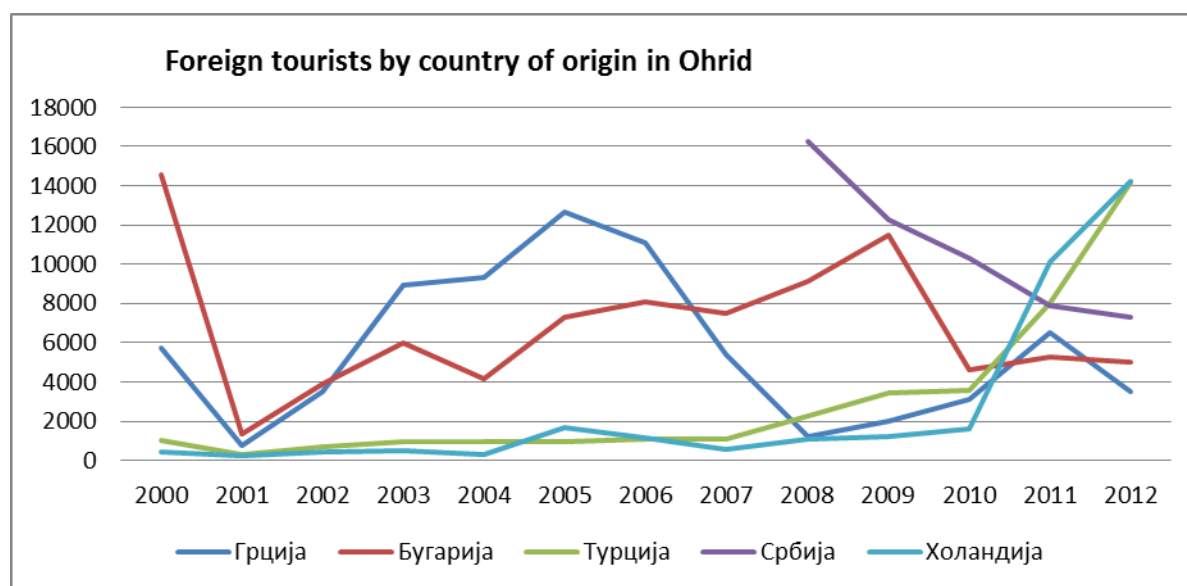


Chart no. 25 - Number of arrived tourists by country of origin in Ohrid

Ohrid as a destination with the largest number of arrived tourists by years has a different structure of the foreign tourists by years. According to the data given in chart 25 the number of foreign tourists by years increases, and that is also predicted by the model made for this series. In the following text given are the data of arrived tourists from different countries of origin during the observed period 2000-2013. Only the series for tourists from Serbia is limited to the period of 2008-2013.

- The series for the number of incoming tourists from Greece in Ohrid has variations in different periods. After the year 2001, their number notes an increase until 2005, when there is a significant decrease in the number of Greek tourists arrived in Ohrid. In the period of 2008-2011, another increase in the number of Greek tourists can be observed and that in a ratio 5,5:1, but again in 2012 their number is reduced by half compared to 2011.

- In chart 25 represented is the number of Bulgarian tourists arrived in Ohrid on a monthly basis in the same period of 2000-2013. After the year 2001 the number of arrived Bulgarian tourists shows an increase until 2009, after which a decrease in their numbers by 50% follows. In the last three years the number of Bulgarian tourists in Ohrid is about 5.000 tourists annually. In the month of September 2009 the ship Ilinden sank carrying Bulgarian tourists.
- The number of arrived Serbian tourists is shown in the chart 25 for the period of 2008-2013. The presented series in the whole period shows a decrease in the number of arrived Serbian tourists. The participation of Serbian tourists in the total number of foreign tourists in 2008 was 26,5%, while in 2012 their share was 8,62%
- The number of arrived Serbian tourists in 2012 is 44% of the number of arrived Serbian tourists observed in 2008, i.e. the decrease in this period is 9.174 tourists per year.
- In the chart no. 25 represented is the series of arrived Croatian tourists in Ohrid in the period of 2000-2013. Although their number does not have a significant share in the total number of arrived tourists (about 3% annually), after all it is important that there is an increase in their numbers in recent years. The same applies to the tourists from Republic of Slovenia whose number is close to the number of arrived Croatian tourists in Ohrid.
- The number of arrived Turkish tourists in Ohrid in the last five years has increased 6,22 times. Their share in the total number of foreign tourists in 2008 was 3,68%, while that percentage in 2012 was 16,9%. In these 5 years the number of tourists from Turkey who visited Ohrid has increased by 11.843 visitors per year.
- In the last three years in Ohrid the number of arrived Dutch tourists significantly increased. This is presented in the chart no. 13. They arrive organized with charter flights, organized by the tour operator TUI, as well as by Fibula Travel. Their participation in 2012 in the total number of foreign tourists was 17%, similar to the tourists from Turkey. The increase of the number of Dutch tourists in the last five years is 13 times. Their share in the total number of foreign tourists in 2008 was only 1,77%

3.2. Foreign tourists by country of origin in the Municipality of Struga

As for the other three municipalities in the Southwest Planning Region also for the Municipality of Struga observed are the foreign tourists who have the largest share in the total number of foreign tourists in this municipality.

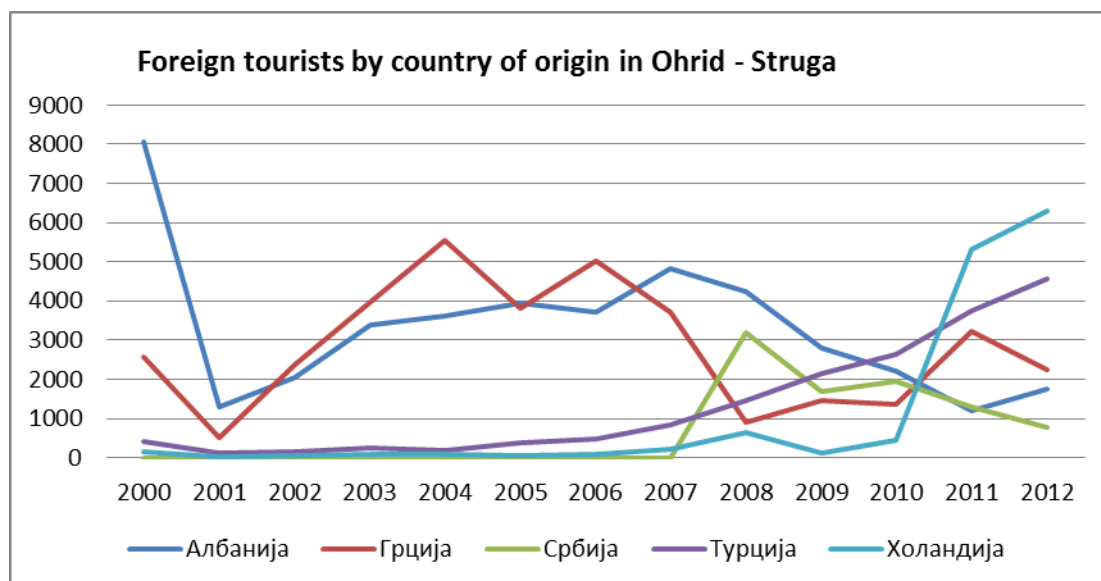


Chart no.26 - Foreign tourists by country of origin – Struga

- On an annual level the number of foreign tourists in the Municipality of Struga increases during the observed period 2000-2013, in addition it is examined which foreign tourists affect on the increase of the number of foreign tourists over the years, and which on the decrease. After the conflict in the year 2001, evident is the increase of the number of Albanian tourists in Struga, after which follows a period of declining of their number. The general tendency is decreasing.
- For the tourists from Greece there is a fluctuation in the series. After 2001 there is an increase of their number by years, where the maximum number of arrived tourists is recorded in 2008, for afterwards their numbers drastically to be reduced, the number of foreign tourists is symbolic and can not define emmitivity. Therefore, emmitivity should be accepted of the most visited regional centers. In recent years, there is again an increase in the number of arrived tourists from Greece, but their number is far lower than what was recorded in 2007 and 2008. Although the general tendency in this series is a slight decrease, the variations show that at different periods these variations are significant. For the confirmation of the stationarity of the series, given are also the values of the test of singular roots for this series.
- For the Serbian tourists the series is limited to the period 2008-2013, as the data from the State Statistical Office were available. For this series evident is a significant decline in the number of arrived tourists in the whole analyzed period.
- The tourists from the neighborhood were traditionally tourists who in the highest numbers visited the municipalities from the Southwest Planning region, but in recent years evident is the decline in the number of tourists from the neighboring countries.

- In chart 26 shown is the number of arrived tourists from the Republic of Turkey in the Municipality of Struga. If by the year 2007, the number of arrived Turkish tourists in Struga is insignificant, in recent years evident is a significant increase of their number. In the last five years their number has increased by three times, and in 2013 the first seven months more Turkish guests arrived than in total in 2012.
- On chart 26 represented is the series of arrived tourists from the Netherlands in the Municipality of Struga. For this series observed is a significant increase in their number in the period of 2011-2012. By 2010 the number of arrived Dutch tourists in Struga is insignificant, for later, through organized bringing and accommodating of the Dutch tourists in the Municipalities of Ohrid and Struga, their number significantly increased. The ratio of the number of arrived Dutch tourists in 2011 compared to 2010 is 11,8 , i.e. from 452 arrived Dutch tourists in 2010 in Struga, their number increased to 5.333 in 2012. They are the main reason for the increase of the total number of arrived foreign tourists in Struga in 2011 compared to 2010, as shown in chart 26.
- The summary difference of the number of arrived Dutch and Turkish tourists in the Municipality of Struga in 2011 compared to 2010 is about 6.000 tourists on an annual level.

3.3. Arrived tourists in Debar according to country of origin

For the Municipality of Debar presented are the series of arrived tourists from Albania and from Serbia. These two countries of origin participate with 64% of the total number of foreign tourists recorded in Debar. From other countries there is a relatively low number, when they would be analyzed individually and therefore they are not shown in this analysis.

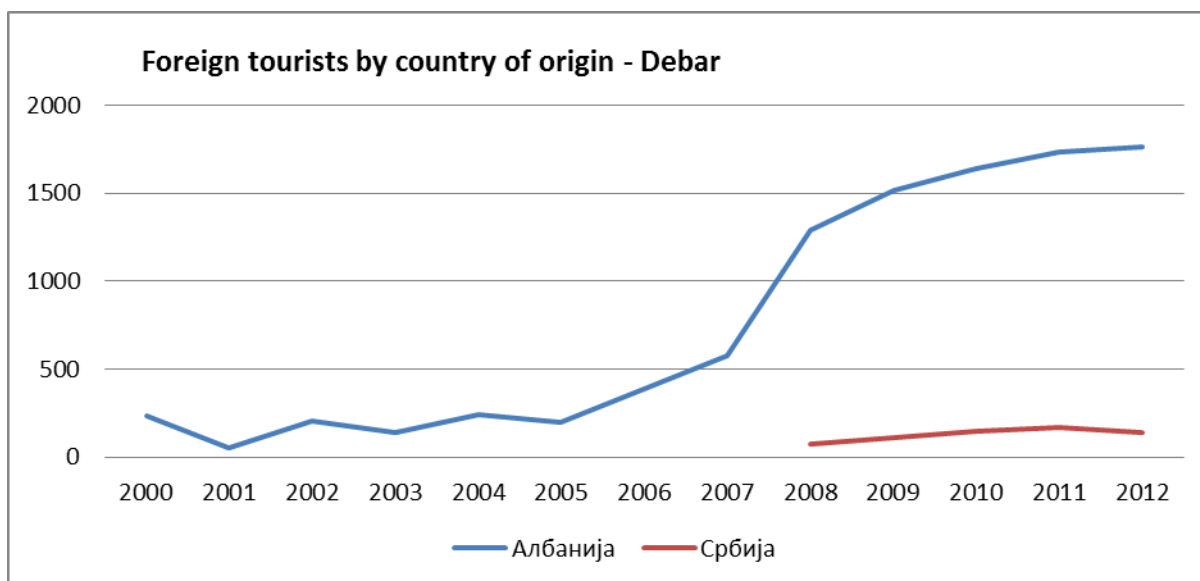


Chart 27 - Foreign tourists by country of origin – Debar

Evident is an increase in the number of arrived Albanian tourists by years, whereas in the last six years that increase has a larger dynamics. In the last five years the number of Albanian tourists in Debar increased by 36.7%. Because they have the largest share of all other foreign tourists, they dictate the increase of the number of foreign tourists in Debar.

On chart 28 shown is the number of arrived Serbian tourists in Debar. Their number is approximately one tenth of the number of arrived Albanian tourists, but according to the share in the total number of tourists they hold the second place.

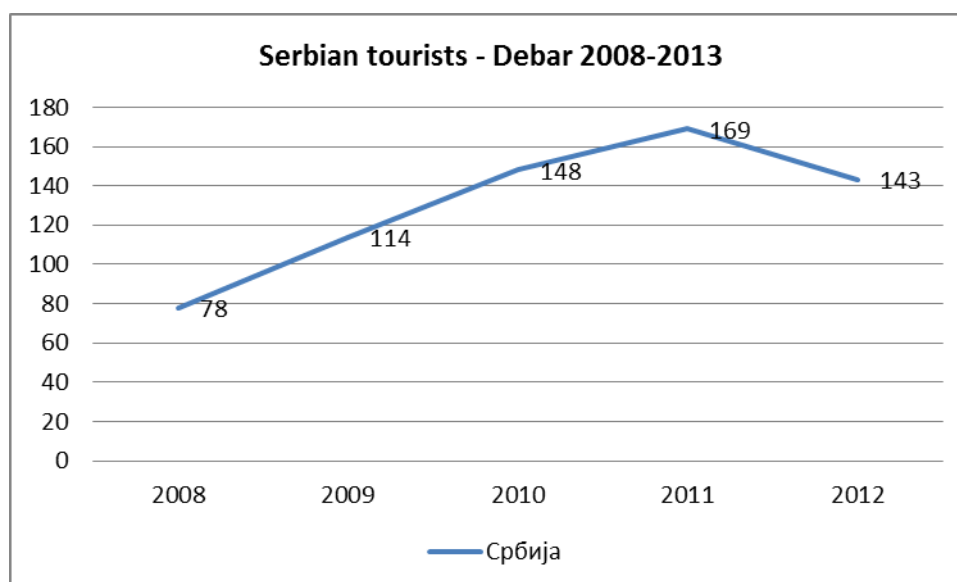


Chart 28: Number of arrived Serbian tourists in Debar by months and in the period 2000-2013

From the first chart the growing trend of the number of arrived Serbian tourists in Debar by years can not be seen, therefore the second graph is created which shows the Serbian tourists cumulatively by years. From that, the positive trend of growth of the number of Serbian tourists in the Municipality of Debar can be observed.

For the municipalities of Kicevo, Makednoski Brod, Vevhani, Centar Zupa and Plasnica the number of foreign tourists is symbolic and can not define the emmitivity. Therefore, emmitivity should from the mostly visited regional centers.

4. SEASONALITY

Determining the seasonality as one of the largest problems in tourism we will determine through analysis of time series in the period of 2000-2013, for the domestic and foreign tourists by municipalities that have the highest attendance and stay.

4.1. Municipality of Ohrid



Chart no. 28 - Number of arrived tourists in Ohrid, on a monthly basis, 01/2000-07/2013

Source: State statistical office

- Evident is the seasonal character of the number of arrived tourists in Ohrid in the reviewed period. In all years July and August are the months in which the highest number of tourists visited Ohrid. In all reviewed years the number of arrived domestic tourists in these two months, is higher than 60% of the total number of domestic tourists arrived during the total year in Ohrid. The same percentage for the

foreign tourists is about 30% more than the total number of incoming foreign tourists throughout the year. This speaks for a lower level of seasonality for the foreign tourist clientele that may represent one of the possible directions in the placement of tourism offer throughout the year. It should also be noted that present are positive developments in the tourism trade of foreign tourists.

For the purpose of this research a modeling of the series of arrived domestic and foreign tourists in Ohrid was done and also done was a prediction of the future values. The beginning of the series is chosen to be in the middle of the year 2003, in order to avoid structural failure of the series that were recorded in 2001. An unstructured model is used for modeling the series, because another seasonal variable was not detected that can be used as an independent variable. Several competitive models were tested for the number of arrived domestic tourists, but as the best was chosen the model (1).

$$D(\text{domasni_turisti})=c(1)*ar(12)+c(2)*ma(1)+\varepsilon \quad (1)$$

The main series is unstationary and in order to provide stationarity, a differentiation was made. After the first differentiating the series is stationary, and a proof for that are the values of the Dickey- Fuller statistics which is given as an attachment. The values of the parameters $c(1)$ and $c(2)$ are also given in attachments. From the value of the parameter $c(1)$ is expected the number of domestic tourists in the future further to decrease. T statistics for the two parameters, and the probability of rejection of these parameters of the model is low, which means that they can be used as valid parameters. Moreover, an analysis of residuals has been done, in order to detect possible serial correlation of the residuals and their heteroscedasticity. In attachments given are the tables of LM statistics and ARCH test. The values of these tests show that there is no serial correlation between the residuals and no heteroscedasticity.

However, the analyzed series is not simple for modeling, given the fact that there is no additional independent variable that structurally would show the correlation with the number of arrived domestic tourists. The number of arrived domestic tourists varies from just over 1.000 at the beginning of the year to more than 30.000 tourists in July and August. The same problem is also present in the predicting of future values of the series.

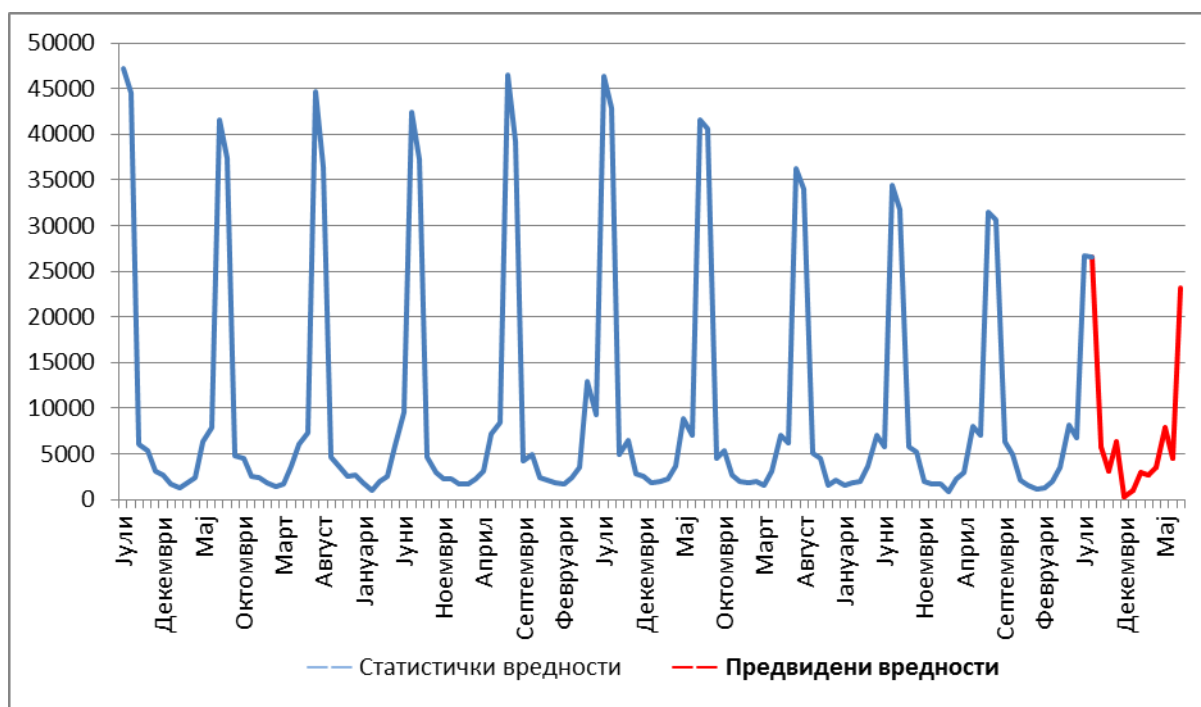
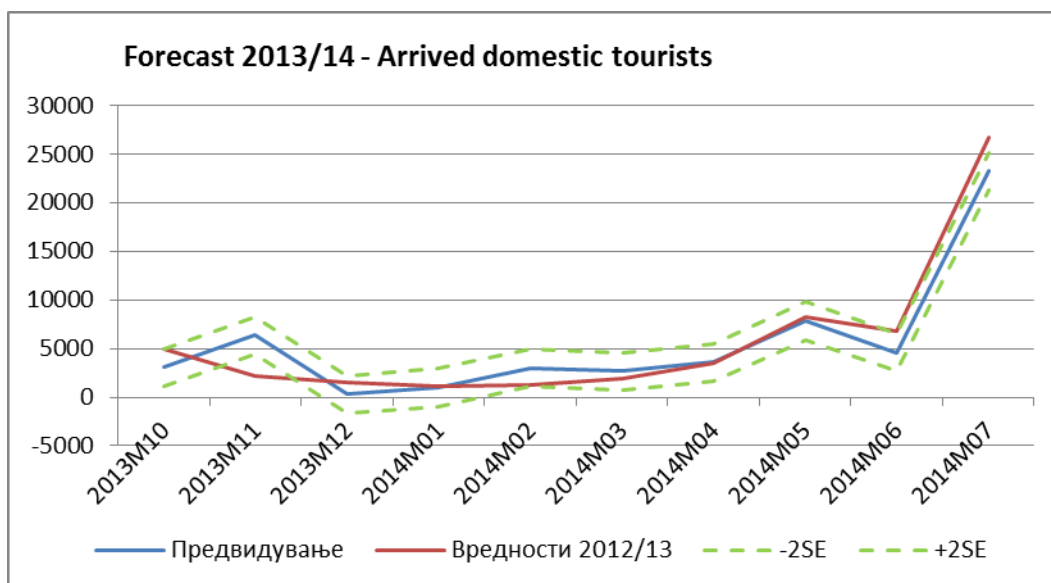


Chart 29: Forecast of future values and comparison with the values of 2012/13

For the purpose of the research conducted is a prediction of the future values of the number of arrived tourists in the coming nine months. For the months where the number of arrived tourists is small, we can not guarantee the accuracy of the model, because the standard error is 958. The predicted values for the most part are within the confines of ± 2 standard errors of the model. The anticipations are that also in the future the number of domestic tourists will decrease if the conditions are not changed in the development of tourism in the Municipality of Ohrid.

The series of foreign tourists is selected in the same way as the series of domestic tourists. For this series as well is necessary a differentiation in order to obtain a stationary series. Proofs for this are the values of the test for unitary roots - Dickey-Fuller.

Unlike the series of the number for arrived domestic tourists, the series of arrived foreign tourists is growing in the whole observed period (Chart 29). Also the model that was created for this series is more complex in terms of the series of domestic tourists. At first, an analysis of the series with the same parameters as for the series of domestic tourists has been done, but the analysis of the residuals shows that this model has a serial correlation of the residuals. Based on the auto – regressional and partial auto – regressional analysis of the series, the significance of the quarterly delaying of the series is determined and that has been input as a parameter in the series. The model is given with (2):

$$D(\text{stranski_turisti}) = c(1) * \text{ar}(12) + c(2) * \text{ma}(1) + c(3) * \text{ma}(4) + \epsilon \quad (2)$$

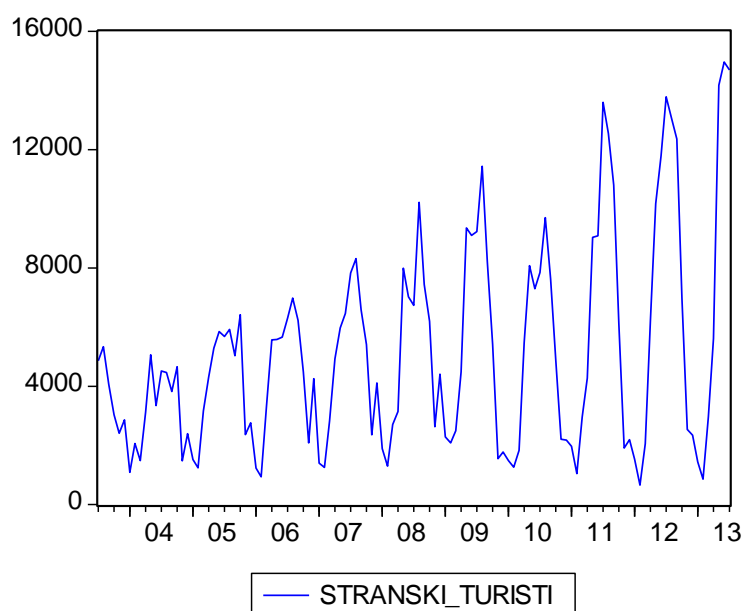


Chart 30: Graphic representation of the number of arrived foreign tourists in Ohrid

The values of the belonging statistics are given in the appendix. From them it can be said that all parameters are significant, the Durbin-Watson- statistics has a value close to 2, but test indicates that there is no serial correlation of the residuals. They also do not suffer from heteroscedasticity. During the modeling of this series, an additional dummy variable was made with a value of 1 for the months of May, June, July, August and September, and for the remaining a value of 0, but the analysis shows that this variable can not be part of the model. Same as with the series for domestic tourists, also for this series there is no structural independent variable which could be used for the modeling.

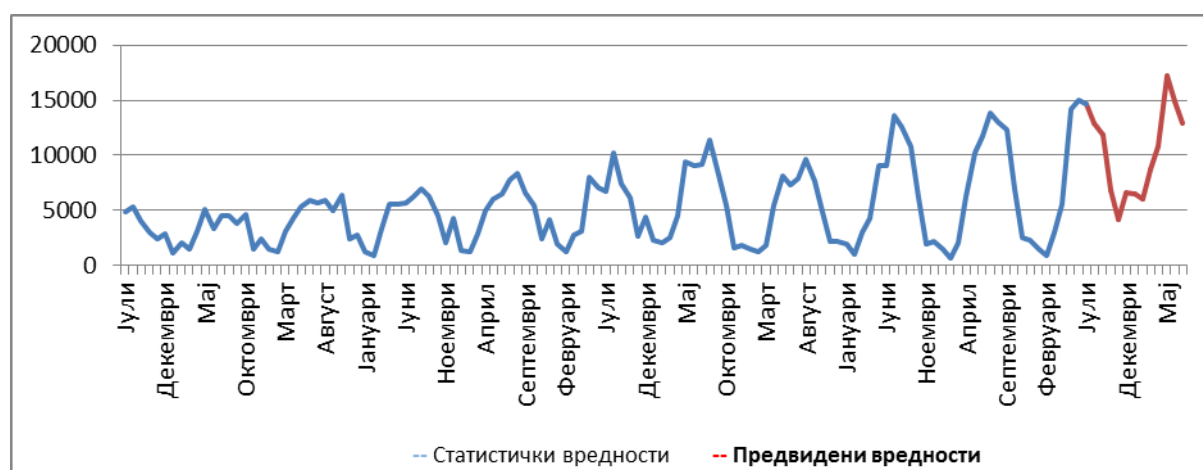
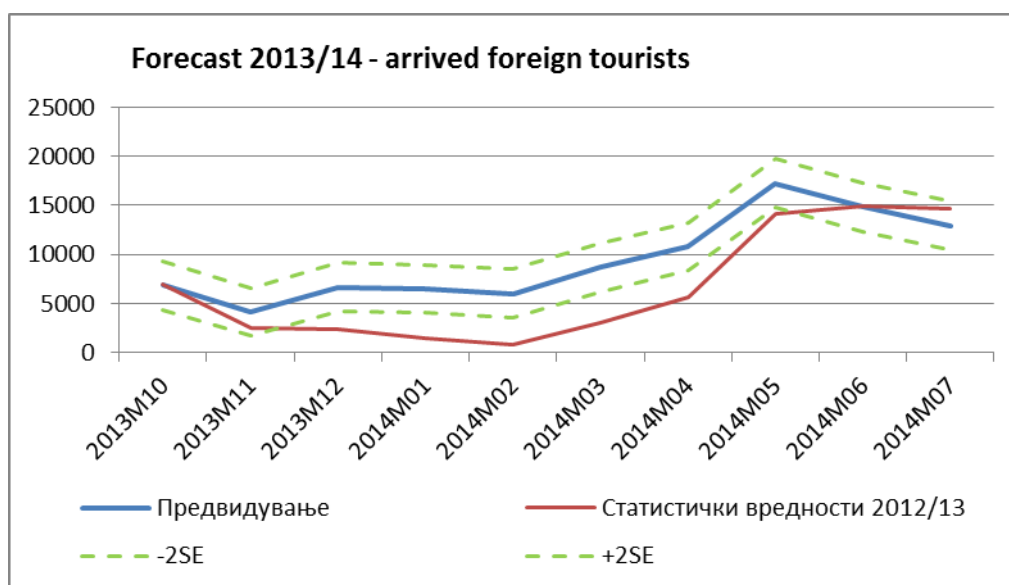


Chart 31 - Series of the number of arrived foreign tourists with forecast for the coming months

In chart 31 provided are the values for predicting the future number of arrivals of foreign tourists under the assumption that the conditions for tourism development will remain unchanged compared to the past period. An increase in the number of foreign tourists is to be expected, i.e. continuing the trend of the previous years. However, certain values should be taken with caution, as well as for the forecast for domestic tourists, especially in the months where the number of arrived tourists is small. During this period, the expected error can significantly affect the predicted values. It can be noticed that almost without exception the number of arrived foreign tourists is expected to be higher than the previous year.

4.2. Municipality of Struga

For the Municipality of Struga available are monthly data on the number of arrived domestic and foreign tourists, as well as the number of nights spent for the domestic and foreign

tourists. A stationary series is again obtained by one differentiation of the series. The results of the test of singular roots are provided as attachment, in the section for analysis of arrived domestic tourists in the Municipality of Struga.

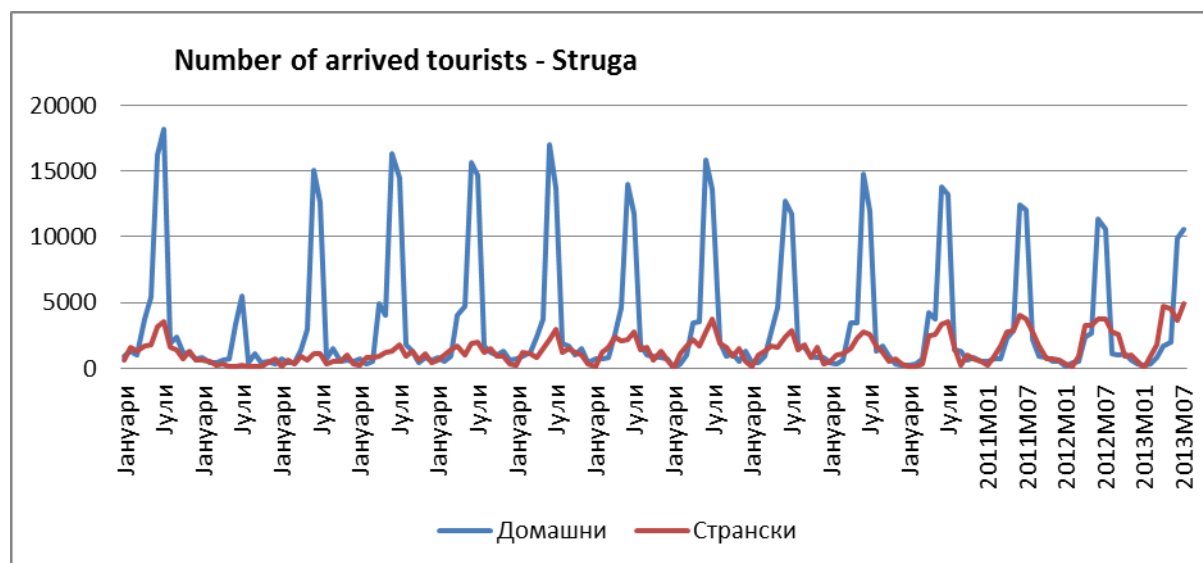


Chart no. 31 - Number of arrived tourists - Struga

For this series more competitive models were explored and with the method of trial and error chosen was a model that meets the criteria for uncorrelation of residuals and a model that meets the other criteria for it to be a valid model for identification. In relation to the previous analyzed models this model has the largest number of independent variables that have statistical significance. As an additional analysis to the model an additional testing was also done for a possible structural failure of the series and the ChowBreakpointTest shows low values for the F-statistics, which means that the series has a structural change of the values. The number of values that remain for analysis are not sufficient to create a valid model for identification. For these reasons, such analysis is not continued for the number of arrived tourists in the Municipality of Struga.

Based on the data about the arrived domestic tourists in the same period 2003:7-2013:7. As for the previous two series, the original series is unstationary and requires one differentiation for stationing the series. Test results of the test for singular roots are given in attachments, in the part of the analysis of the number of realized overnights. This series according to its appearance is similar to the series of the number of arrived domestic tourists.

The series of the number of realized overnights for domestic visitors is a greater challenge for modeling than the previous two series. Although the graphical appearance of the series has the almost identical shape as the series for the number of arrived domestic tourists, the modeling with stationing of the series and searching auto-regressional parameters did not

provide any result. Taking into account the results of the previous modeling of the series for the number of arrived domestic tourists we calculated the correlation coefficient for these two series. It is 0,9927 , which is not surprising. Based on this we conducted the modeling of the series, but this time with using logarithmic of the dependent and independent variable. The model we created is given with (3):

$$\text{Log}(\text{nokjevanja_domasni})=c(1)*\text{log}(\text{domasni_turisti})+c(2)*\text{ar}(12)+c(3)*\text{ma}(2)+\epsilon \quad (3)$$

In attachment to this research provided are the belonging statistics of the model, as well as the LM statistics and the ARCHtest which indicate that the residuals are not serially correlated, and that they are normally distributed and that there is no heteroscedasticity. The prediction of future values is a relatively easy task when all other parameters are known.

4.3. Municipality of Debar

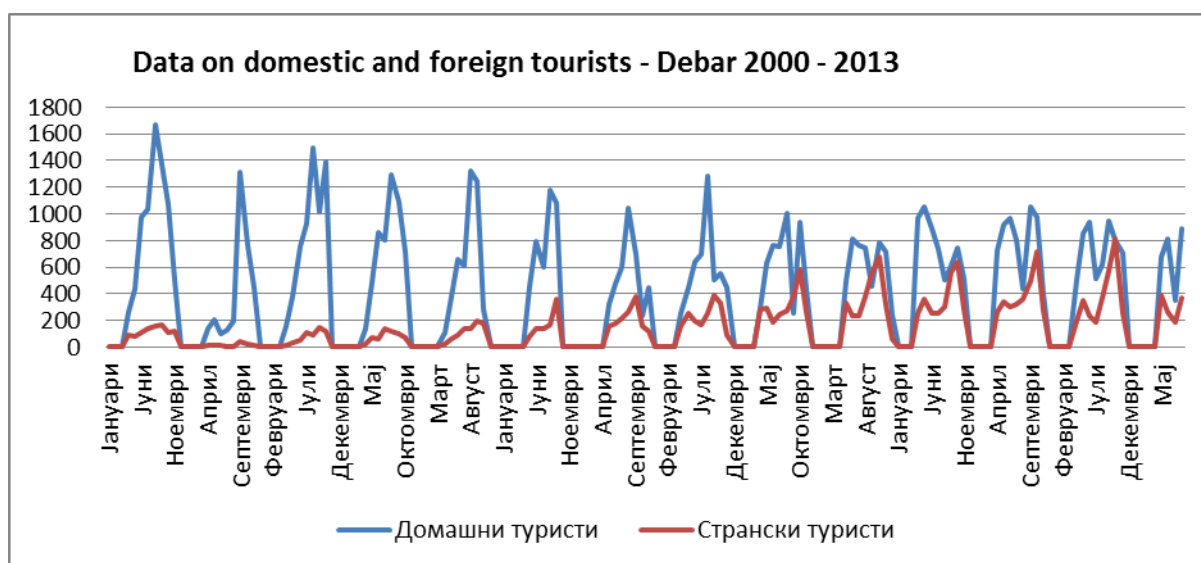


Chart 32: Number of arrived domestic and foreign tourists in the Municipality of Debar – 2000-2013

From the data presented in chart 32 the following can be observed:

- The series has an expressed seasonality, same as it is the case with the series for the other municipalities from the Southwest Planning Region which are previously analyzed;
- Although there is an expressed seasonality, the number of tourists in Debar is often distributed in four or more months (June, July, August and September) compared to the season in Ohrid which is mainly concentrated in two months. For example in 2010

tourists who arrived from May including September is 63% of the total number of tourists, compared to Ohrid where the percentage of 60% is achieved in the months of July and August. The same conclusion can also be made for the number of arrived tourists in Debar.

On the chart 33 shown is the number of arrived domestic and foreign tourists by months for the period 2006-2013. Unlike the previously analyzed municipalities, for this municipality there don't exist statistical data for the whole period 2000-2013.

4.4. Municipality of Kicevo

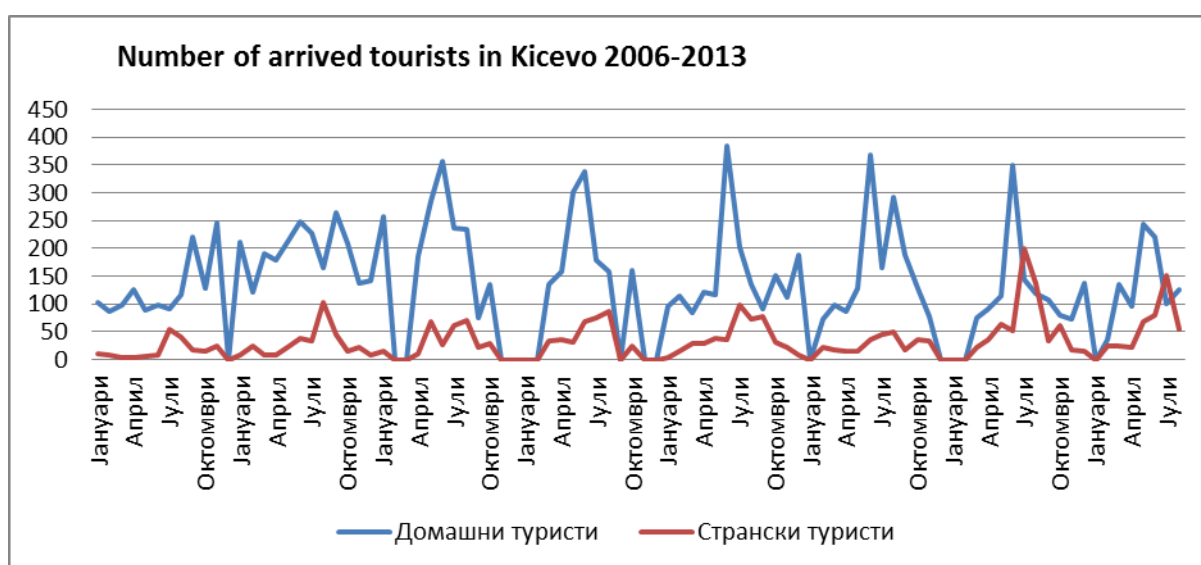


Chart 33: Number of arrived tourists in Kicevo in the period 2006-2013

- From the chart it can be seen that there is no usual pattern of arrival of domestic and foreign tourists in the Municipality of Kicevo. That what can be seen for the last few years is that for the domestic tourists the highest numbers can be observed in the month of June and the most visited months are from April to August.

5. HUMAN RESOURCES

Employment that was elaborated in the part of tourism development includes also indicators relating to the use of human resources. In hospitality in the region are employed on a permanent basis approximately 2.200 employees. Characteristic of the employment is that still seasonality prevails in employment which in turn creates certain problems. Based

on the interviews that we did with the business sector, we concluded that in this area there are several problems that have to be overcome. They suggest that seasonality gives discontinuity in a professional sense. It is therefore necessary to establish concepts of permanent education in the hospitality sector and permanent practical training.

Desiring to obtain a rate on the employment of skilled and professional staff employed in this sector we set an appropriate question in the research sample. From the municipal administration we received a very low rating, which means that higher professionalism and expertise during the employment in this sector is needed. It is indicative that exactly the business sector gave the lowest score on this question of 2.9.

6. INTRAREGIONAL BALANCED DEVELOPMENT

The analysis of intraregional relations shows that in the region there exist an uneven development, affirmation of resources and lack of cooperation. Namely, according to the number of visitors the tourists in Ohrid and Struga dominate, while the other municipalities noticeable lag behind in this regard. The richness of various attractive factors in other municipalities shows that the expectations are justified for dimensioning a comprehensive tourism offer. It is therefore very important the strategic approach to be directed towards rural areas and the underdeveloped municipalities in this area. In the area of cooperative relations, a favorable basis is the municipal Law on the intermunicipal cooperation. The favorable basis results from the fact that it enables the mutual organizing of spatial units for the purposes of tourism, establishing joint tourism products and intra - municipal performances on the tourist market.

IV EMPIRICAL RESEARCH

Within the Study and in the context of determining the characteristics of the region, and with the aim to provide objective contents for creating the Action Plan for development we interpreted two empirical studies.

1. ANALYSIS ON THE RESULTS OF THE PRIMARY RESEARCH

For the requirements of the Study on the tourism potentials of the Southwest Planning Region, two surveys were created and an interview was done with the experts of the field of local economic development and managers of the field of tourism that actively work in the tourism industry of the Southwest Planning Region. In the following text given are the results of the conducted survey, with comments on the results.

The first survey was conducted with the aim to examine the opinion of tourists who visited some or several municipalities in the Southwest Planning Region. Covered were 308 questioned tourists, both domestic and foreign in the period of August - October 2013. The questionnaire consists of 30 questions, was to be answered anonymously, and is mainly divided into two parts. The first section provides general questions where questions were placed about the person who completed the questionnaire (such as age, sex, country of origin, method of visiting the region). The second part is intended to issues related to the research that examines their opinion on certain segments of tourism offer in the Southwest Planning Region. For part of the questions the Likert - scale was used through which they expressed the degree of pleasure of a particular tourist offer. During the analysis the software for statistical analysis was used IBM SPSS –Software package for statistical analysis.

The **first question** refers to the age of the respondents. The age for selection is divided into five categories: under 18 years, 19-30 years, 31-50 years, 51-64 years and more than 64 years. The results of this question are given in table 22.

Table no. 22 -Distribution of the age of respondents

		Frequency	Percent	Valid Percent
Valid	0-18	3	1.0	1.0
	19-30	69	22.4	22.4
	31-50	76	24.7	24.7
	51-64	109	35.4	35.4
	65+	51	16.6	16.6
	Total	308	100.0	100.0

The majority of respondents are people aged 51-64 years. After them the most present group in the survey are persons of the age interval 31-50 years. Young persons aged 19-30 are represented by 22.4%, and older than 64 years are 16.6%.

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The **second question** refers to the gender of respondents. In table 23 provided are the results of this question.

Table 23 - Number and percentage participation of the questioned people by gender

		Frequency	Percent	Valid Percent
Valid	Male	138	44.8	44.8
	Female	170	55.2	55.2
	Total	308	100.0	100.0

Of the respondents, 170 people are female, while 138 are male.

The **third question** refers to the country of origin. Domestic tourists chose an option, while foreigners wrote which country they come from. The results of this question are presented in table 24.

Table no. 24 - Questionned people by country of origin

Country of origin

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid .00	1	.3	.3	.3
Macedonia	101	32.8	32.8	33.1
Netherlands	74	24.0	24.0	57.1
Turkey	9	2.9	2.9	60.1
Serbia	4	1.3	1.3	61.4
Austria	29	9.4	9.4	70.8
Belgium	10	3.2	3.2	74.0
Albania	15	4.9	4.9	78.9
Germany	4	1.3	1.3	80.2
Bulgaria	1	.3	.3	80.5
Kosovo	6	1.9	1.9	82.5
Bosnia Hercegovina	7	2.3	2.3	84.7
Slovakia	3	1.0	1.0	85.7
Ukraine	4	1.3	1.3	87.0
Sweden	5	1.6	1.6	88.6
UK	5	1.6	1.6	90.3
Russia	2	.6	.6	90.9
Montenegro	2	.6	.6	91.6
Croatia	1	.3	.3	91.9
Monaco	1	.3	.3	92.2
Romania	1	.3	.3	92.5

Spain	1	.3	.3	92.9
India	2	.6	.6	93.5
Switzerland	4	1.3	1.3	94.8
Czech Rep.	2	.6	.6	95.5
Others	11	3.6	3.6	99.0
USA	3	1.0	1.0	100.0
Total	308	100.0	100.0	

One surveyed person didn't declare the country of origin. Domestic tourists participate with 32.8% of the total number of respondents; while the most dominating foreign tourists are tourists from the Netherlands with 24%. From the table it can be seen that questioned were respondents from different countries.

The **fourth question** refers to which time they are visiting Macedonia, i.e. Southwest Planning Region. Part of the domestic tourists did not answer this question. The results are given in table 25

Table 25 - Which time do you visit Macedonia / the region

		Frequency	Percent	Valid Percent
Valid	First time	146	47.4	56.8
	Second time	53	17.2	20.6
	Three or more times	58	18.8	22.6
	Total	257	83.4	100.0
Missing	System	51	16.6	
Total		308	100.0	

Of the surveyed, 51 people did not answer the question. The largest percentage of the respondents, or 146 (47.4%), for the first time visited Macedonia and the Southwest Planning Region. 58 surveyed people, or 18.8%, visited the region three or more times.

The **fifth question** concerns the way in which they arrived in the region. The idea was to examine how many of the tourists come organized over tour operators, and how much come individually. The results are given in table 26.

Table no. 26 - How did you arrive in the region: organized or individually

	Frequency	Percent	Valid Percent
Valid Individually	139	45.1	45.1
Organized-agency	169	54.9	54.9
Total	308	100.0	100.0

From the results it can be seen that more than half of the respondents arriving in an organized way (54.9%), while 139 (45.1%) of the respondents came with their own organizing.

The **sixth question** concerns the reasons for visiting the tourism destination. Offered were several alternative answers, while given was also an option the participants to give an additional answer. The results are given in table 27.

Table no. 27 - Answers for the reasons for visiting the tourism destination

		Frequency	Percent	Valid Percent
Valid	Resting and relaxation	157	51.0	52.0
	Visiting relatives and friends	15	4.9	5.0
	Business reasons	5	1.6	1.7
	Attending a conference, congress, seminar, and other form of education	34	11.0	11.3
	Culture	58	18.8	19.2
	Fun	6	1.9	2.0
	Sports and recreation	3	1.0	1.0
	Health	24	7.8	7.9
	Total	302	98.1	100.0
Missing	System	6	1.9	
Total		308	100.0	

Of all respondents 6 (1.9%) did not answer the question. The largest part of the 157 respondents (51%), visited the destination for resting and recreation. The second reason for visiting the destination is visiting the cultural heritage and events in the field of culture. Then follows the number of respondents that visited the destination for conference reasons. The least number of visitors as a reason for visiting, stated sports and recreation reasons. The reason health is chosen by 24 (7.8%) respondents.

The **seventh question** refers to the visited natural heritage. There weren't given answers to the respondents from which they could choose, but they had manually to fill which places of the natural heritage of the region the visited. 101 respondents did not answer this question at all. Some respondents gave general answers that do not fit the question as " Ohrid, Struga, Bitola". In the table no. 28 presented are the most answers given by the respondents and the number of respondents who gave the appropriate response. The respondents were able to give multiple answers to this question.

Table no. 28 - „Which natural attractions have you visited“

Ohrid Lake	61
National Park Galicica	34
Area at St. John Kaneo	7
Area at St. Naum Ohridski	58
The river Crn Drim	4
Spa	7
Biljana springs	3
Samuil fortress	3
Vevcani springs	5
The area of the old town	4
Area at the Museum on water	3

From the given answers it can be said that the highest natural attractiveness in the Southwest Planning Region is the Ohrid Lake. On second place is the area around the church of St. Naum and the wider environment. On third place is the National Park Galicica

The **eighth question** refers to the satisfaction of the visited natural heritage. The scale of satisfaction is according to the Likert scale, which offered two positive, two negative and one neutral response. The results are given in table 29.

Table no. 29 - Level of satisfaction of the visited natural heritage

		Frequency	Percent	Valid Percent
Valid	Very satisfied	172	55.8	58.7
	Satisfied	95	30.8	32.4
	not satisfied nor dissatisfied	26	8.4	8.9
	Total	293	95.1	100.0
Missing	System	15	4.9	
Total		308	100.0	
		$\bar{x} = 1.502$	$\sigma = 0,655$	

This question was not answered by 15 (4.9%) respondents. There is no negative answer which is pointing to the fact that all respondents who answered this question have a positive or neutral position. Cumulative positive answers are 267 (86.69%). Most of the 172 respondents (55.8%) answered that they are very satisfied with the visited natural wealth of the tourism destination. On second place according to the number of answers is the answer is "satisfied" that was chosen by 95 (30.8%) of the respondents. 26 respondents gave a neutral response to this question. Some of the respondents that gave a neutral response gave also a comment. Most of the comments concerned the messy spaces, while some are related to the presence of domestic animals without owners on certain visited locations.

The average grade is $\bar{x} = 1.502$, whereas 1 is the highest grade. The standard deviation is 0,655.

The **ninth question** refers to the visited cultural heritage. Similar as in the seventh question, the respondents were offered answers that they could choose, but had to write themselves which attractions of cultural heritage they have visited. The respondents could give multiple answers to this question. The question was not answered by 115 respondents. Some gave a comment that the questionnaire they completed was only one day after their arrival and did not have time to visit such locations. Some respondents gave a descriptive answer such as "Churches and museums." The results are given in table 30.

Table 30 - Which attractions of cultural heritage have you visited

Samuil fortress	16
Ancient theatre	6
Plaoshnik	30
Church St. Sofia	27
House of Grigor Prlicev	2
Museum – House of Robevci	7
Church St. Naum	57
Museum on water	7
Church St. John Bigorski	11
Church St. John Kaneo	51

From the given answers it can be observed that the majority of respondents who provided answers, visited the church of St. Naum Ohridski, and on second place is the church St. John Kaneo. Plaoshnik is on third place by representation of the tourists. Surprising is the fact that cultural heritage in the old city is represented in varying degrees, and the tours by tourist guides during the visiting of the old part of the city cover the most part of the examined cultural heritage in this area.

The **tenth question** is related to the level of satisfaction of the visited cultural heritage. Also for this question it is treated in the same manner as in the examination of the level of the satisfaction of the visited natural heritage. The results are given in table 31.

Table 31: Level of satisfaction of the visited cultural heritage

		Frequency	Percent	Valid Percent
Valid	Very satisfied	147	47.7	54.0
	Satisfied	104	33.8	38.2
	not satisfied nor dissatisfied	21	6.8	7.7
	Total	272	88.3	100.0
Missing	System	36	11.7	
Total		308	100.0	
		$\bar{x} = 1.537$	$\sigma = 0,636$	

Also for this question there was no negative answer. 36 (11.7%) respondents did not answer this question. The largest part of the 147 respondents (47.7%) answered with "very satisfied" while 104 (33.8%) answered "satisfied". Only 21 (6.8%) respondents answered neutrally. For this question only two comments were given that the respondents could not find a tour guide for providing them with details about the cultural heritage. The average grade for the satisfaction of the cultural heritage is $\bar{x} = 1.537$, while 1 is the highest score and the standard deviation is $\sigma = 0,636$.

The **eleventh question** refers to the degree of satisfaction of the hosts of the accommodation and hospitality of the service providers. The same scale is used for expressing satisfaction and the analysis is done in the same way as the previous analysis where this scale is used. The results are given in table 32.

Table 32: Level of satisfaction from the hospitality of the services

		Frequency	Percent	Valid Percent
Valid	Very satisfied	176	57.1	59.5
	Satisfied	99	32.1	33.4
	not satisfied nor dissatisfied	21	6.8	7.1
	Total	296	96.1	100.0
Missing	System	12	3.9	
Total		308	100.0	
		$\bar{x} = 1.476$	$\sigma=0,627$	

Also for this question there were no negative answers. Most of the respondents were very satisfied - 176 (57.1%), while 99 (32.1%) said that they were satisfied. Neutral responses gave 21 (6.8%) of the respondents. Some respondents gave comments that some accommodation facilities did not have heating in autumn. The average value is $\bar{x} = 1.476$, while the standard deviation is $\sigma=0,627$.

The **twelfth question** refers to the price in terms of the quality that the tourists receive. The results are given in table 33.

Table no.33 - Analysis of the level of satisfaction of the prices compared to the quality

		Frequency	Percent	Valid Percent
Valid	Very satisfied	134	43.5	46.2
	Satisfied	116	37.7	40.0
	not satisfied nor dissatisfied	30	9.7	10.3
	Dissatisfied	9	2.9	3.1
	Very dissatisfied	1	.3	.3
	Total	290	94.2	100.0
Missing	System	18	5.8	
Total		308	100.0	
		$\bar{x} = 1.714$	$\sigma=0,801$	

On this question 18 respondents did not answer. The majority of respondents 134 (43.5%) said they were very satisfied. After them follow 116 (37.7%) respondents who indicated that they were satisfied with the ratio price quality of the products and services they have purchased. Neutral were 30 (9.7%) respondents. On this question negatively declared themselves 10 (3.2%) respondents. The average value is slightly higher than the previous questions $\bar{x}=1.714$, while also the standard deviation $\sigma=0,801$. Respondents who answered that they were not satisfied gave also their own comments on the questions. The comments refer to the comparison of prices in the tourism destination who visited also competitive tourism destinations. Their opinion is that the prices for the offers should be lower.

The **thirteenth question** refers to the diversity of the offer. The scale for expressing the pleasure is the same as for the previous questions. The results are given in table 34.

Table no. 34 - Analysis on the level of satisfaction of the diversity of the offer

Diversity of the offer

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very satisfied	104	33.8	35.9	35.9
	Satisfied	145	47.1	50.0	85.9
	not satisfied nor dissatisfied	35	11.4	12.1	97.9
	Dissatisfied	6	1.9	2.1	100.0
	Total	290	94.2	100.0	
Missing	System	18	5.8		
Total		308	100.0		
		$\bar{x} = 1.803$	$\sigma=0,725$		

And for this question 18 respondents did not provide an answer. Most of the 145 respondents (47.1%) said that they were satisfied with the variety. 104 (33.8%) are very satisfied with the diversity of the offer they received in the tourism destination. Not even one of the respondents was very dissatisfied. 35 (11.4%) of the respondents said that they were neutral regarded the diversity of the offer. Only 6 (1.9%) respondents said they were dissatisfied with the diversity of the offer. The average grade of the responses is 1,803 and

the standard deviation is $\sigma=0,725$. Most of the respondents who declared themselves negatively have visited the resort several times. Compared to the previous visits their comment is that the site does not offer new content and new offer.

The **fourteenth question** refers to the quality of the accommodation. The results are given in the table 35.

Table no. 35 - Analysis on the satisfaction of the quality of the accommodation

	Frequency	Percent	Valid Percent
Very satisfied	142	46.1	49.7
Satisfied	112	36.4	39.2
not satisfied nor dissatisfied	19	6.2	6.6
Dissatisfied	9	2.9	3.1
Very dissatisfied	3	1.0	1.0
Total	286	92.9	100.0
Missing System	23	7.5	
Total	308	100.0	
	$\bar{x} = 1.663$	$\sigma=0,822$	

For this question 23 (7.5%) respondents did not provide an answer. Most of the 142 respondents (46.1%) declared as very satisfied. On second place, according to the provided answers is the answer "satisfied" that chose 112 (36.4 %) respondents. Neutral declared themselves 19 (6.2%) of the respondents, while negatively declared themselves as dissatisfied 9 (2.9%) subjects and very dissatisfied 3 (1%) respondents. Those who answered negatively gave an explanation for their answers. Most often they complain about the poor conditions in the facility where they were accommodated in some facilities there was no heating and no hot water in autumn. The average value of the results of the poll on this question is $\bar{x} = 1.663$, while the standard deviation is $\sigma=0,822$. For this question there is a great value of the standard deviation indicating the different levels of satisfaction among the respondents

The **fifteenth question** refers to the quality of the restaurant offer in the tourism destination. The results are given in table 36.

Table 36 - Results on the question for the satisfaction of the quality of the restaurant offer

		Frequency	Percent	Valid Percent
Valid	Very satisfied	125	40.6	43.6
	Satisfied	127	41.2	44.3
	not satisfied nor dissatisfied	28	9.1	9.8
	Dissatisfied	3	1.0	1.0
	Very dissatisfied	4	1.3	1.4
	Total	287	93.2	100.0
Missing	System	21	6.8	
Total		308	100.0	
		$\bar{x} = 1.725$	$\sigma = 0,792$	

For this question 21 (6.8%) respondents did not give an answer. The majority of the respondents 127 (41.2%) chose the answer "satisfied". On second place according to the number of responses is "very satisfied" for which declared 125 (40.6%) respondents. A total of 252 (81.8%) respondents positively answered. Neutral answered 28 (9.1%) of the respondents. Negatively declared themselves 7 (2.6%) subjects, and that 3 as dissatisfied, and 4 as very dissatisfied.

The comments of the respondents who chose a negative answer refers to food quality, diversity of the restaurants' offer, and the waiting time to be served.

The average value of the results for this question is $\bar{x} = 1.725$, while the standard deviation is $\sigma = 0,792$.

The **sixteenth question** is "How satisfied are you with the transport and connections." The survey results are given in table 36.

Table 36 - Results of the question" How satisfied are you with the transport and connections"

		Frequency	Percent	Valid Percent
Valid	Very satisfied	62	20.1	23.2
	Satisfied	125	40.6	46.8
	not satisfied nor dissatisfied	56	18.2	21.0
	Dissatisfied	22	7.1	8.2
	Very dissatisfied	2	.6	.7
	Total	267	86.7	100.0
Missing	System	41	13.3	
Total		308	100.0	
		$\bar{x} = 2.165$	$\sigma=0,903$	

On this question did not answer 41 (13.3%) respondents. The majority of respondents 125 (40.6%) answered with "satisfied". Very satisfied were 62 (20.1%) respondents. Neutral answered 56 (18.2%) respondents. Negatively declared themselves 24 (7.7%) subjects, or 22 (7.1%) are dissatisfied, while 2 (0.6%) are very dissatisfied with the offer of transport and connections. Some of them react on the possibility and method of arrival to the tourism destination, and some to the offer of transportation in the tourism destination. Generally the remarks refer to the lack of direct lines of transportation, limited offer for transport (mostly buses), poor quality of the vehicles and poor road infrastructure. A part of the comments refer to the prices for renting of vehicles. Renting a bike in Ohrid is being offered for 15 euros a day.

The **seventeenth question** refers to the hygiene in the accommodation facility and in the other facilities that they have visited in the tourism destination. The results are given in table 37.

Table no. 37 - Results of the question „ How satisfied are with the hygiene“

		Frequency	Percent	Valid Percent
Valid	Very satisfied	80	26.0	28.4
	Satisfied	134	43.5	47.5
	not satisfied nor dissatisfied	51	16.6	18.1
	Dissatisfied	10	3.2	3.5
	Very dissatisfied	7	2.3	2.5
	Total	282	91.6	100.0
Missing	System	26	8.4	
Total		308	100.0	
		$\bar{x} = 2.043$	$\sigma=0,912$	

The majority of respondents 134 (43,5%) answered that they were satisfied with the hygiene, while 80 (26%) said they were "very satisfied". Neutral on the question of hygiene have decided 51 (16,6%) respondents. Negative attitude on this question have 17 (5.5%) respondents. The question didn't answer 26 (8.4%) respondents.

The comments of the respondents are about the lack of public toilets and the insufficient hygiene and hygiene means in the toilets they visited.

The average value for this question is $\bar{x} = 2.043$, while the standard deviation $\sigma=0,912$.

The **eighteenth question** is about the degree of satisfaction of the availability to information about the tourism destination. The results are given in table 38.

Table 38 - Results of the question „ How satisfied are you with the quantity and availability of information about the tourism sites and attractions“

		Frequency	Percent	Valid Percent
Valid	Very satisfied	71	23.1	25.1
	Satisfied	142	46.1	50.2
	not satisfied nor dissatisfied	53	17.2	18.7
	Dissatisfied	14	4.5	4.9
	Very dissatisfied	3	1.0	1.1
	Total	283	91.9	100.0
Missing	System	25	8.1	
Total		308	100.0	
		$\bar{x} = 2.067$	$\sigma=0,854$	

On this question most of the respondents 142 (46,1%) said they were satisfied with the amount of available information about the tourism places and attractions. Twice less 71 (23,1%) expressed that they are very satisfied with the availability of information about the tourism places and attractions. Neutrally answered 53 (17,2%) respondents, while 17 negatively (5,5%). The respondents who gave answered negatively also provided comments that they expect a greater quantity and diversity of information on tourism places, both in printed and electronic form. A part complains that the can not obtain information in different foreign languages.

The average value for this question is $\bar{x} = 2.067$, while the standard deviation $\sigma=0,854$.

The **nineteenth question** refers to the source of information about the tourism destination. The results are provided in table 39.

Table no. 39 - Results of the question „ How was the information provided to you about the tourism offer of the region“

	Frequency	Percent
Television	25	7.58
Internet	147	44.55
From friends	71	21.52
From travel agencies	87	26.36
No answer	25	
Total	330	100.00

On this question the respondents had the opportunity to choose multiple answers; therefore the total number of answers is greater than the total number of respondents. From the results it is evident that most of the respondents 147 (44,55%) obtained the information from the Internet. In second place as a source of information for tourists are tourism agencies which gave information to 87 (26,36%) respondents. On third place according to representation for providing information about the tourism destination are friends who provided information to 71 (21,52%) respondents. The lowest number of respondents 25 (7,58%) received information from television.

Based on the answers to this question the promotional activities about the tourism attractions should be properly targeted. It is necessary to examine the quantity and variety of information available on the World Wide Web, the languages on which they are presented and whether the information are being updated.

The **twentieth question** refers to the satisfaction of the promotional activities about the tourism destination. The results are given in table 40.

Table 40 - Results of the survey on the question „Express your level of satisfaction from the promotional activities“

		Frequency	Percent	Valid Percent
Valid	Very satisfied	53	17.2	21.0
	Satisfied	131	42.5	52.0
	not satisfied nor dissatisfied	57	18.5	22.6
	Dissatisfied	11	3.6	4.4
	Total	252	81.8	100.0
Missing	System	56	18.2	
Total		308	100.0	
		$\bar{x} = 2.103$	$\sigma=0,776$	

On this question did not answer 56 (18,2%) respondents. The most part of the respondents 131 (42,5%) have chosen the answer "satisfied". On second place 57 (18,5%), according to the prevalence are the respondents with a neutral stance on this issue. 53 (17,2%) respondents are very satisfied with the promotional activities about the tourism destination. Dissatisfied are 11 (3,6%), while there are not many dissatisfied. The dissatisfied respondents gave no further explanations for this attitude.

On the **twenty-first question** which results are given in table 41 the respondents answered about the level of satisfaction from the internal road connections.

Table no. 41 - Results of the question „indicate the degree of satisfaction of the internal transport connections“

		Frequency	Percent	Valid Percent
Valid	Very satisfied	37	12.0	14.0
	Satisfied	125	40.6	47.3
	not satisfied nor dissatisfied	70	22.7	26.5
	Dissatisfied	24	7.8	9.1
	Very dissatisfied	8	2.6	3.0
	Total	264	85.7	100.0
Missing	System	44	14.3	
Total		308	100.0	
		$\bar{x} = 2.398$	$\sigma = 0.942$	

On this question the largest part of the respondents 125 (40,6%) chose the answer "satisfied". The answer "very satisfied" selected 37 (12%) respondents. A large part of the respondents 70 (22,7%) gave a neutral answer, 32 (10,4%) gave a negative response. The respondents who gave a negative answer also gave some remarks on the internal road connections. Their remarks refer to the lack of ability to transport from one place to another, the frequency of the connections, the quality of road infrastructure and the quality of the vehicles. Some respondents react to the lack of information about the connections and times of departure at the bus stops.

This question is with the highest average value of all till now analyzed, i.e. the worst scores are given. In addition, also the standard deviation indicates on the different opinions among the respondents on this question.

The **twenty-second question** refers to the level of satisfaction of the organization of the facilities of the tourism offer. The results are given in table 42.

Table no. 42 - Results about the level of satisfaction from the facilities of the tourism offer

		Frequency	Percent	Valid Percent
Valid	Very satisfied	73	23.7	27.4
	Satisfied	141	45.8	53.0
	not satisfied nor dissatisfied	44	14.3	16.5
	Dissatisfied	8	2.6	3.0
	Total	266	86.4	100.0
Missing	System	42	13.6	
Total		308	100.0	
		$\bar{x} = 1.951$	$\sigma = 0.748$	

On this question didn't answer 42 (13,6%) respondents. The largest part of these 141 (45,8%) chose the answer "satisfied". On second place according to the number of respondents are those who chose the answer "very pleased". This answer was selected by 73 (23,7%). Neutrally answered 44 (14,3%), while negatively 8 (2,6). For the answer "very dissatisfied" not any of the respondents decided. Those respondents, who gave negative answers, did not give specific comments that explain their dissatisfaction. The average value is less than 2, which also indicates for the positive opinion of the respondents.

The **twenty-third question** refers to the level of satisfaction of the information and communication infrastructure in the accommodation facility and in the tourism destination. The results are given in table 43.

Table 43 - Results of the question „Express the level of satisfaction on the information and communication infrastructure“

		Frequency	Percent	Valid Percent
Valid	Very satisfied	92	29.9	33.6
	Satisfied	132	42.9	48.2
	not satisfied nor dissatisfied	46	14.9	16.8
	Dissatisfied	3	1.0	1.1
	Very dissatisfied	1	.3	.4
	Total	274	89.0	100.0
Missing	System	34	11.0	
Total		308	100.0	
		$\bar{x} = 1.865$	$\sigma = 0.751$	

From the results it can be observed that most of the respondents 132 (42,9%) chose the answer "satisfied" on this question. On second place according to the number of respondents is the answer "very pleased" that was chosen by 92 (29,9%). Neutrally declared 46 (14,9%) respondents, while negatively 4 (1,3%). This corresponds to the previous examining of the information infrastructure in the categorized facilities in the region, where it was determined that all offer free internet access. In some facilities internet is available throughout the whole facility, while in others only in the public spaces.

Забелешките на испитаниците кои дале негативна оценка се однесуваат на сместувачки објекти од ниска категорија. На ова прашање не одговориле 34 (11%) испитаници.

The comments of the respondents who gave a negative grade refer to the accommodation facilities of low category. On this question didn't answer 34 (11%) respondents.

The **twenty fourth question** refers to the level of the satisfaction of the offered entertainment in the tourism destination. The results are given in the table 24.

Table no. 44 - Results of the question „Express the level of satisfaction of the offered entertainment contents in the tourism destination“

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Very satisfied	58	18.8	22.7	22.7
	Satisfied	104	33.8	40.8	63.5
	not satisfied nor dissatisfied	67	21.8	26.3	89.8
	Dissatisfied	21	6.8	8.2	98.0
	Very dissatisfied	5	1.6	2.0	100.0
	Total	255	82.8	100.0	
Missing	System	53	17.2		
Total		308	100.0		
		$\bar{x} = 2.259$	$\sigma=0,966$		

From the results the diversity of answers can be seen, but also the poor evaluation for the offer of entertainment compared to the other aspects for which the respondents expressed the level of satisfaction in the previous questions.

Most respondents again chose the answer "satisfied". Neutrally answered 67 (21,8%) respondents. As very satisfied of the entertainment offer declared 58 (18,8%) respondents. Negatively on this question have declared themselves 26 (8,4%).

Respondents who gave negative answers have comments on the diversity of the offer of entertainment contents such as theme parks, themed cafes and nightclubs. Those respondents who have several times stayed in Ohrid have a remark on the immutability of the offer of entertainment activities.

The **twenty-fifth question** refers to the level of satisfaction of the opportunities for recreation. The results of the survey on this question are given in table 45.

Table no. 45 - Results of the question „ How high is the level of satisfaction of the opportunities for recreation activities in the tourism destination“

		Frequency	Percent	Valid Percent
Valid	Very satisfied	52	16.9	20.2
	Satisfied	135	43.8	52.5
	not satisfied nor dissatisfied	58	18.8	22.6
	Dissatisfied	8	2.6	3.1
	Very dissatisfied	4	1.3	1.6
	Total	257	83.4	100.0
Missing	System	51	16.6	
Total		308	100.0	
		$\bar{x} = 2.132$	$\sigma = 0,823$	

The majority of the respondents declared as satisfied of the opportunities for recreation in the tourism destination. On second place according to the number of chosen answers 58 (18,8%) is the neutral response. Very satisfied are 52 (16,9%) respondents. Negative attitude on this question have 12 (3,9%) respondents. 51 (16,6%) respondents didn't provide an answer to this question.

Respondents who answered negatively have a remark on the diversity of recreational opportunities. According to the opinion of the respondents they expect more water recreations, opportunity for sailing, minigolf terrains.

A part of the respondents which declared as satisfied or very satisfied as a positive example of recreation cited the training of scuba diving that is being offered to tourists.

The **twenty-sixth question** refers to the level of satisfaction of the offered cultural events. The results are given in table 46.

Table 46 - Results of the question: „Evaluate the level of satisfaction of the offer of cultural events“

		Frequency	Percent	Valid Percent
Valid	Very satisfied	84	27.3	33.7
	Satisfied	102	33.1	41.0
	not satisfied nor dissatisfied	51	16.6	20.5
	Dissatisfied	11	3.6	4.4
	Very dissatisfied	1	.3	.4
	Total	249	80.8	100.0
Missing	System	59	19.2	
Total		308	100.0	
		$\bar{x} = 1.968$	$\sigma=0,870$	

From the results it can be seen that most of the respondents 102 (33,1%) have chosen the answer "satisfied". Very satisfied are 84 (27,3%) respondents. 51 (16.6%) respondents gave a neutral answer, and a negative attitude on this question have 12 (3,9%) respondents.

The respondents who express a negative attitude indicate a lack of cultural events in the tourism destination they have visited, while a part of the respondents who expressed satisfaction of the offer of cultural events gave a remark that some of the cultural events overlap with the terms and are not able to follow all events that they would like to visit. On this issue it is necessary to further do analysis by tourism places or municipalities.

The **twenty-seventh question** is given in order to determine the level of satisfaction of the offer of national food in the tourism places. The results of the survey are given in table 47.

Table 47 - Results of the question „Evaluate the level of satisfaction of the offer of national cuisine“

		Frequency	Percent	Valid Percent
Valid	Very satisfied	91	29.5	32.9
	Satisfied	129	41.9	46.6
	not satisfied nor dissatisfied	45	14.6	16.2
	Dissatisfied	10	3.2	3.6
	Very dissatisfied	2	.6	.7
	Total	277	89.9	100.0
Missing	System	31	10.1	
Total		308	100.0	
		$\bar{x} = 1.928$	$\sigma = 0.835$	

On this question did not answer 31 (10,1%) respondents. The majority of the respondents 129 (41,9%) chose the answer "satisfied". On second place according to the number of selected answers is "very satisfied" that is chosen by 91 (29,5%) respondents. Negatively answered 12 (3,8%) respondents.

Respondents who have a negative attitude gave a comment that there is not enough variety of dishes of national cuisine and that it is not sufficiently promoted.

The **twenty-eighth question** refers to the height of the daily spending by the tourists. On this question weren't offered scales for choosing, rather it was left to the respondents themselves to write the amount in euros that they spend on a daily basis. The results are given in table 48.

Table 48 - Results of the question: „What is the amount of your expenditure that you spend in a day during your stay in the tourism destination“

	Number of respondents	Percent
Up to 20	66	21.4
20-50	102	33.1
50-100	53	17.2
>100	8	2.6
Didn't answer	79	25.7
Total	229	100.0
	$\bar{x} = 33.66$	$\sigma=25,63$

Up to 20 euros a day spend 66 (21,4%) respondents. In the interval 20-50 euros spend 102 (33,1%) the highest number of respondents. The average spending of respondents is in these limits, i.e. it is 33,66 euros/day. In the interval 50-100 euros spend 53 (17,2%) respondents and for amounts higher than 100 euros declared 8 (2,6%) respondents.

The whole table with the amount of daily expenses is given below.

Table 49 - Complete table of daily consumption according to the data of the respondents

		Frequency	Percent	Valid Percent
Valid	3.40	1	.3	.4
	4.00	1	.3	.4
	5.00	5	1.6	2.2
	8.00	1	.3	.4
	10.00	29	9.4	12.7
	11.00	1	.3	.4
	13.00	1	.3	.4
	15.00	21	6.8	9.2
	16.00	3	1.0	1.3
	17.00	1	.3	.4

	18.00	2	.6	.9
	20.00	34	11.0	14.8
	22.00	1	.3	.4
	25.00	10	3.2	4.4
	30.00	25	8.1	10.9
	33.00	1	.3	.4
	35.00	11	3.6	4.8
	37.00	1	.3	.4
	40.00	13	4.2	5.7
	45.00	6	1.9	2.6
	50.00	32	10.4	14.0
	55.00	1	.3	.4
	60.00	8	2.6	3.5
	65.00	3	1.0	1.3
	70.00	6	1.9	2.6
	75.00	1	.3	.4
	80.00	2	.6	.9
	100.00	4	1.3	1.7
	115.00	1	.3	.4
	140.00	1	.3	.4
	150.00	1	.3	.4
	200.00	1	.3	.4
	Total	229	74.4	100.0
Missing	System	79	25.6	
Total		308	100.0	

On the **twenty-ninth question** the respondents gave their own comments and suggestions for improving the situations in tourism for the tourism destination that they have visited.

The remarks and suggestions are the same that are given for the previous questions that were asked within the questionnaire. For these reasons, the results of this question will not be further commented.

The last, **thirtieth question** refers to the attitude of the respondents whether they would visit the tourism destination of the Southwest Planning Region again. The responses are given in table 50.

Table 50 - Results of the question: „Would you visit the region again“

		Frequency	Percent	Valid Percent
Valid	Yes	189	61.4	67.5
	Maybe	79	25.6	28.2
	Probably not	10	3.2	3.6
	Never again	2	.6	.7
	Total	280	90.9	100.0
Missing	System	28	9.1	
Total		308	100.0	
		$\bar{x} = 1.375$	$\sigma = 0,592$	

2. CROSSING OF SEVERAL INDEPENDENT AND SEVERAL DEPENDENT VARIABLE

During the analysis of the questionnaire as well as during the whole process of research questions have raised about the dependence between the independent variables (taken from the general information about the respondents) and dependent variables (their preferences for certain aspects of their stay in the tourism destination). With the help of IBM SPSS software an additional inter-sectional analysis was made and the results are given below.

1. Crossing of gender and the level of satisfaction of the visited cultural heritage

The hypothesis for this question is that there is no difference in the preferences for visiting the cultural heritage between the two genders. In table 51 given are the results of this inter-sectional analysis for this crossing.

Table no.51 – Crossing of the series gender with the satisfaction of the visiting of cultural heritage

Cultural heritage * Gender Crosstabulation				
Count		Gender		Total
		Male	Female	
Cultural heritage	Very satisfied	60	87	147
	Satisfied	45	59	104
	Not satisfied nor dissatisfied	17	4	21
Total		122	150	272

Chi-Square Tests			
	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	12.138 ^a	2	.002
Likelihood Ratio	12.652	2	.002
Linear-by-Linear Association	6.711	1	.010
N of Valid Cases	272		
Spearman Correlation	-.129		

From the belonging statistics it can be seen that the Pearson-Lesser statistics has pretty high value for two degrees of freedom, and the correlation has a low negative value of -0.129. On this basis it can be concluded that these two series have small mutual correlation, and rejects the hypothesis of same preferences regarding the visiting of cultural heritage.

3. ANALYSIS OF THE RESULTS OF THE INTERVIEW DONE WITH THE EXPERTS OF THE SITUATIONS BY MUNICIPALITIES, TRAVEL AGENCIES AND HOTELS IN THE REGION

The questionnaire assesses the characteristics of tourism development in the region. The results of the survey research are given summarized and by average of the municipalities according to the field of analysis.

3.1. ASSESSMENT OF THE SPATIAL POSITION

Regarding the spatial position the managers of the local economic development of the municipalities on the regional level gave a relatively high level of assessment. The average value of the grade is 3,18. The lowest value is given in terms of the involvement of the tourism offer in package tours. It is approximately 2,44.

The highest grade refers to the openness of the region towards the neighboring regions for visiting by tourists. The same grade is also given by the business sector, while the lowest score of the business sector is given for the level of exchange of tourist with the neighboring regions. This sector averagely assessed the spatial position of the region with a higher grade compared to the municipalities. Generally, it is a relatively high grade from both of the experts of the situations. Therefore, it can be concluded that the spatial position is one of the most important factors of the region.

Regarding the attractiveness of the natural resources, the average grade is 2.81, which is a relatively low grade. In it, the highest level have the springs, lakes and rivers, as well as the National Park, while the waterfalls are the lowest ranked. In the business sector, the opinion on natural resources in the region received a summary grade of 2.97, while highest marked are the coastal forms and lakes. Thus, it can be concluded that according to this question although the average grades are relatively low, the lakes and beaches play a leading role as natural resourcea.

Regarding the cultural values, the participants in the interview of the LED offices gave low scores. The average score is 24.2 for the cultural - historical monuments. Lowest was rated the industrial heritage with a grade 1.33, while the highest was the religious with a grade 3. The grades for the cultural - historical monuments by the business sector are significantly higher, i.e. with an average grade of 3.30. This indicates that the business sector sees a greater potential for tourism usage of the material cultural heritage.

As for the museums and institutions, the average grade is 2.47, while the highest score has the archaeological museum. Poorly are assessed the visitor centers. The businesses sector evaluated the museums and cultural institutions with a grade of 2.73 which coincides with the assessment given by the experts from the municipalities.

Events and manifestations had an average grade of 3.2, while in them prevail the high grade of the cultural events with 3.5. The business sector follows this trend with an average grade, thus for the events and manifestations an average score of 3.34 was obtained where again the highest rated are the cultural events. Also their further involvement in tourism development should be of dominant significance.

As for the ethnographic heritage the average grade is 2.48, whereas the highest grade is given to folklore, while economic activities are poorly assessed with a grade of 1.81. This assessment suggests that little attention is given to traditional economic activities which are the basis for the development of rural tourism. We follow almost an identical trend with respondents from the business sector where the average score for ethnographic heritage is 2.71.

The average grade for the social conditions is 2.49, while the highest grade is given for the activities of the Government of the Republic of Macedonia in the promotion of tourism. They rated them with a grade of 3.66. The lowest is assessed the level of plans for expanding the contents of tourists' stay in the Southwest Planning Region. Indicative is the data that the business sector has evaluated the social conditions for tourism development with a higher grade or 3.26. Again, the government's actions for promotion are evaluated with a high grade of 3.6, but it should be kept in mind that the business sector with the lowest grade assessed the issue whether the revenues from the tourism tax are being adequately used which suggests a more transparent use of these funds.

The experts of the situations rated the communication links with an average grade of 2.68. Moreover, lowest grades have rail and water transport which indicates an evident situation in this sphere. The business sector declared in a similar way, so that rail transport was assessed with 1.5, and water transport with a grade of 2.12.

Regarding the receptive resources, the assessment is relatively high and is 3.21 where the highest grade is given for the tourism acceptability by the population 3.88. Information infrastructure has the lowest rating among both the municipal administration and the business community. The highest is identical, and it refers to the social acceptability of tourism by the population.

The development indicators are assessed with a low score of 2.47, whereas lowest is rated the quality of the package tours by the travel agencies. The business sector gave interesting grades in terms of the development indicators. With an average value of 3.15 it can be concluded that the development indicators have a positive trend of development. The highest score by the business sector is given for the issue of the level of contents for the tourists. Interesting is the lowest grade by the business sector which is 2.90, the hoteliers and travel agencies, and refers to the level of employment of skilled and professional staff in the domain of tourism. This situation coincides with the analysis in the employment sector, its seasonal character and engagement of the professional staff which is ready to face the

challenges of contemporary tourism development. The business sector has a critical attitude towards the professionalism and competence in this sector.

Regarding the evaluation of the potentials, the lowest grade is given for the resource management, and the highest for the human potentials that exist but are not used. Again the business sector with their grades provides space for thinking and action with giving the lowest grade for the activities that refer to overcoming the seasonal character of tourism.

The interregional development associated with tourism products is very weak and requires thorough improvement.

Overview of the summary results of the business sector and business administration is given in attachments.

CONCLUSIONS

- The region is a spatial unit with international character in the domain of tourism which is a positive circumstance for its development.
- Still from the spatial position transitivity is not used in the best way. Contact characteristics allow linking the region to the neighborhood, while polyvalence the use of tourism products with contents that are present in the region and beyond.
- The natural potentials are heterogeneous and represent an excellent value as well as one of the basic potentials for tourism development. But they still have not been sufficiently exploited. Necessary is appropriate linking of the tourism values, organizing of space, promotion and involvement in package tours.
- There is a complex of significant cultural heritage, part of which is under protection of UNESCO. The uneven distribution of cultural heritage is according to the concentration of cultural heritage in certain parts of the region. The presentation of cultural heritage is weak, and no plans exist for managing the sites of cultural heritage in the region.
- In the rural areas there exists a significant complex of values which are not included in the tourism offer, and represent a potential for development of tourism.
- The social conditions for development represent the basic framework which is defined at national level and municipal level. Necessary is the harmonizing of strategic plans and documents in horizontal and vertical basis, as well as updating, i.e. adopting a document in the function of tourism development. The funds of the tourism tax should be transparently used and redistributed in the tourism sphere.
- The justified organizational structure should be improved in the part of cluster approach.
- Communication links need to be improved in the part of water and rail transport, while the vehicles and road networks to be improved in their quality. In terms of air transport, the emphasis should be put on the low-cost airline connections and charter flights. Necessary is that in the area of accommodation facilities to encourage the quality of the type of luxury hotels.
- The orientation should be on opening new camps and bringing together nature with accommodation facilities.
- Hygiene in tourism facilities should be improved and the treatment and selection of disposed waste to be taken into account, the construction of water treatment

stations and supply of quality water. The linking of accommodation facilities and travel agencies must be improved. Categorization of accommodation units.

- Internet connections should be improved and made available to all locations.
- Attendance registers dynamics among foreign tourists, but present is reducing among the domestic tourists. It is necessary to keep the tendencies in international tourism trade and to improve the tourism offer aimed at domestic tourist population. Important is an effective pricing policy adapted to the capabilities of the domestic clientele
- Stay is improved among foreign tourists, which means that the inflow of foreign currencies is continuously increasing.
- The determined consumption of tourists is \$ 45 USD per overnight, which is about half of the world average. The tendency is positive.
- The tendency of constant increase of the GDP of trade, hospitality and transport in GDP which is realized at a level of the region should be preserved in the future. The average annual increase in the analyzed period is approximately 7.7% annually. That means that in the next four years we can expect a corresponding increase of about 8% per year.
- Based on the above stated conclusions an action plan is adopted whose implementation will contribute to accelerate tourism development.

V INCREASING THE SHARE OF TOURISM AND THE HOTEL-CATERING SECTOR OF THE SOUTHWEST PLANNING REGION

Increasing the share of tourism and hotel-catering industry is the main developmental benefit of tourism and its selectivity. In order to realize this general goal of the study approach during the research, it is necessary to analyze the contribution of the tourism and hotel-catering activity in the GDP of the Republic of Macedonia in the Southwest Planning Region.

Table no. 52 - Share of tourism and hotel-catering sector in GDP of the Republic of Macedonia

Year	GDP in RM			Components of BDP, subsectors and departments of NKD Rev.1		Percentage share of tour. and hot.-cat. sector in BDP of RM
	Absolute values (in millions den.)	Base index	Share of SWPR In BDP of RM (%)	Gross value	Base index	
2002	243.970	100	08.May	6.328	100	2,59
2003	258.369	105.9	07.Apr.	7.006	110.7	2,71
2004	272.462	111.7	07.Aug.	6.966	110.1	2,56
2005	295.052	120.9	07.Apr.	7.381	116.6	2,50
2006	320.059	131.2	07.Apr.	8.244	130.3	2,58
2007	364.989	149.6	7.0	10.246	161.9	2,81
2008	411.728	168.8	08.Jan.	11.757	185.8	2,86
2009	410.734	168.4	07.Jun.	10.084	159.4	2,46
2010	434.112	177.9	8.0	10.409	164.5	2,40
2011	459.789	188.5	07.Aug.	10.790	170.5	2,35

From the table overview it can be seen that the share of hotels and restaurants sector in the GDP of the Republic of Macedonia in the last analyzed year is 2.3. If this indicator is seen in the whole analyzed period it can be observed that the deviations are relatively small. Therefore we conclude that there is no noticeable increase in the relation to the structure of GDP, generated in the hotels and restaurants sector.

In order to see the stability of the movements in the share of this sector in GDP of the Southwest Planning Region, we will use the data given in the period 2002-2009. They are provided in the following table.

Table no. 53 - Share of the sectors of Trade, hospitality and transport in the GDP of the SWPR

Year	GDP in SWPR		Percentage share of tour. and hot.-cat. sector in BDP of SWPR		
	Absolute values (In mil. den.)	Base index	Absolute values (E+Ж+3) Trade, hospitality and transport (in million denars) Southwest Planning Region	Base index	
2002	20.678	100	4.169	100	20,16
2003	19.191	92.8	4.030	96,67	21,00
2004	21.176	102.4	3.671	88,05	17,34
2005	21.786	105.4	4.477	107,39	20,55
2006	23.789	115.0	5.541	132,91	23,29
2007	25.569	123.7	5.848	140,27	22,87
2008	33.492	162.0	8.025	192,49	23,96
2009	31.136	150.6	6.737	161,60	21,64
2010	34.514	166.9			
2011	35.942	173.8			

In the table overview the share of hotels and restaurants is given cumulatively with transport and trade. Therefore the amount of participation of this overall sector is higher and can not be compared with the share that the sector of hotels and restaurants have in the Republic of Macedonia. However, for us relevant is that in this respect there is an apparent stability of the GDP in the Southwest Planning Region. The increase is especially pronounced in the last three analyzed years 2006-2009.

Having in mind the stability of the share of the tourism sector in the structure of GDP, we can conclude that also in the future these relations will maintain. Considering however, that the increase of tourism spending of the foreign tourists is significant, we can predict that it will also lead to the increase of GDP of this sector in the Southwest Planning Region.

VI ACTION PLAN – PRIORITIES

The Action plan should provide a framework for realization of the goals in this Study. Therefore, we approached towards synthetic observations of the gained results. With these activities covered were the results derived from secondary and primary research. Based on this we can create the following Action plan.

Methodologically, during the determining of priorities, identified were priorities of importance of the Southwest Planning Region and priorities for development of the municipalities.

The analysis of the tourism trade followed by domestic and foreign tourists in terms of their arrivals and average stay shows that the region encounters with one of the largest problems in tourism, that is seasonality. The unbalanced distribution of tourists in the region is in the context of pronounced seasonality. Eliminating seasonality will contribute to the growth of GDP in the region and at national level of the Republic of Macedonia. This coincides with the established primary objective of the Study that through the taking of measures these relations will be improved. Therefore as fundamental priorities impose:

- Eliminating the seasonal character of tourism and a balanced use of the facilities throughout the whole year;
- A more balanced distribution of tourism trade within the region.

Priority 1: Eliminating the seasonal character and a balanced use of facilities throughout the whole year.

Contents:

1. Development of selective types of tourism which don't have a summer season character;
2. Promotion of tourism values of non-seasonal character;
3. Adjusting the prices of services - elastic pricing policy;
4. Social package tours in the out of season periods.

Activities

- 1.1. Winter sports activities – development of winter tourism.
- 1.2. Creating specific tourism products for the domestic market

- 1.3. Improving spa tourism and creating spa centers - wellness tourism
- 1.4. Development of rural tourism, health tourism, sports tourism, speleological tourism
- 1.5. Organizing off-season events
- 2.1. Organizing promotional days of tourism
- 2.2. Attending specialized fairs for selective types of tourism
- 2.3. Networking in international thematic associations (European Association of Cultural Routes, European Associations of Towns with Castles...)
- 3.1. Campaigning for adjusting the prices according to the seasonal criterion
- 3.2. Analysis of competitive regions and countries
- 3.3. Improving the cooperative relations between agencies and the providers of hospitality services in order to create off-season package tours
- 3.4. Linking with tour operators of international character
- 4.1. Adopting a Benefit Policy for pupils, students, retirees, sportists
- 4.2. Creating procedures for public-private partnerships and concessions as an opportunity for tourism offer of social character

Carriers:

- 1.1. Ministry of Economy and local government. Owners of land and public institutions.
Partners: Investors, associations and organizations
- 1.2. Tourism agencies and associations in the field of tourism intermediation
- 1.3. Ministry of Economy, local government, owners, associations and organizations
- 1.4. Ministries, local government, tourism agencies, owners. Partners: Agencies, hoteliers, business sector, associations and organizations
- 1.5. Ministries, local government, organizations and associations. Partners: Agencies, hoteliers, business sector
- 2.1. Agency for Promotion and Development of Tourism, local government. Partners: Organizations, associations, agencies, business sector
- 2.2. Agency for Promotion and Development of Tourism, local government. Partners: organizations, associations, agencies, business sector
- 2.3. Local government, associations and organizations. Partners: Business sector
- 3.1. Ministry of Economy, Agency for Promotion and Development of Tourism, local government. Partners: Business sector
- 3.2. Ministry of Economy, Agency for Promotion and Development of Tourism, associations and organizations. Partners: Business sector
- 3.3. Chambers, organizations and associations. Partners: Business sector
- 3.4. Tourism promoters appointed by the Government and agencies. Partners: Business sector
- 4.1. Ministries. Partners: Associations, business sector
- 4.2. Ministries. Partners: Associations, business sector

Indicators for success:

- 1.1. Constructed winter-sports centers, realized overnights in the winter period
- 1.2. Increased number of tourism products intended for the domestic market. Increased participation of domestic tourists off season
- 1.3. Facilities for spa and wellness centers according to international standards. Modernization of existing facilities
- 1.4. Increased number of tourists and establishing of centers for the development of selective types of tourism and creating products of selective kind for the off-season offer
- 1.5. Number of created off-season events in the tourism offer
- 2.1. Number of registered events of this character
- 2.2. Number of participations and contracts signed
- 2.3. Established network
- 3.1. Reduced off-season prices and increased volume of capacity utilization
- 3.2. Conducted analysis and adopted recommendations within the pricing policy
- 3.3. Number of signed contracts and realized arrangements
- 3.4. Number of signed international contracts and realized arrangements
- 4.1. Increased number of visitors, adopted legislation acts on benefits
- 4.2. Number of published and realized offers

Priority 2: A more balanced distribution of tourism trade within the region

Contents:

1. Putting into operation the potentials for tourism development;
2. Improving the transport connectivity of the tourism resources;
3. Development of tourism in rural areas;
4. Specific activities with the development of tourism in rural areas.

Activities:

- 1.1. Organizing and equipping of the space for tourism activities
- 1.2. Promotion of the potentials and networking
- 1.3. Linking with tourism agencies and the business sector
- 1.4. Training of the service providers in rural areas
- 2.1. Improving the existing and constructing new communications and signalization
- 2.2. Improving the transport vehicles, establishing a regular and more frequent bus lines transport within the region
- 2.3. Encouraging subsidizing of low – cost flights

- 2.4. Establishing ferry services with Albania
- 2.5. Linking with neighboring regions, especially in rural areas
- 3.1. Adopting planning documentation – urban plans
- 3.2. Adaptation and restoration of facilities for accommodation and hospitality
- 3.3. Using funds for rural development
- 3.4. Revitalization of rural communities
- 3.5. Improvement of livestock and its diversity
- 4.1. Revitalization of transport attractions (Old Railway – Oslomej, ancient road Vajtos - Via Egnatia, reconstruction of the old bridge between Centar Zupa and Debar, restoration of the railway track through Debarca - Ciro)
- 4.2. Conservation, restoration and revitalization of the old forts in rural areas (Kitino kale, Kodzadzik, Devina Kula, Kale Debar, Gabavski rid)
- 4.3. Establishing exhibitions related to historical events and persons in rural areas
- 4.4. Revitalization of ethnographic heritage in the function of tourism development (mills and valavici in the whole region)
- 4.5. Arranging water resources and releasing into operation in the function of tourism development (lakes, waterfalls, springs)
- 4.6. Creating trails in rural areas for herbal tourism activities

Carriers:

- 1.1. Ministries, local government, owners. Partners: Organizations and associations
- 1.2. Agency for Promotion and Development of Tourism, local government. Partners: Business sector
- 1.3. Owners, public institutions. Partners: Associations, organizations and business sector
- 1.4. Educational institutions and training centers. Partners: Owners, Business sector, associations and organizations
- 2.1. Ministries and local government. Partners: Associations and organizations, local communities
- 2.2. Ministries, local government. Partners: Transport companies, associations and organizations, local communities
- 2.3. Ministries, local government, public institutions. Partners: airlines, agencies
- 2.4. Ministries, local government, public institutions. Partners: ship transporters, agencies
- 2.5. Ministries, local government. Partners: Local communities, business sector
- 3.1. Ministries, local government. Partners: business sector, owners
- 3.2. Ministries, owners, public companies. Partners: business community, local communities

- 3.3. Owners. Partners: Associations, international institutions
- 3.4. Ministries, local government, local communities. Partners: owners, international institutions
- 3.5. Ministries, offices, associations of farmers, local government, agencies. Partners: organizations, associations, international associations
- 4.1. Ministries and local government. Partners: Local communities, business sector and international institutions and foundations
- 4.2. Ministries and local government. Partners: Local communities, business sector and international institutions and foundations
- 4.3. Ministries and local government. Partners: Local communities, business sector and international institutions and foundations
- 4.4. Local government, owners. Partners: Local communities, business sector and international institutions and foundations
- 4.5. Ministries, local government. Partners: Local communities, business sector and international institutions and foundations
- 4.6. Ministries, local government. Partners: Business sector and local communities, international institutions and foundations

APPENDIX

APPENDIX - 1

Table – values of Dickey-Fuller statistics for undifferentiated and differentiated series for the number of arrived domestic tourists in Ohrid

Null Hypothesis: DOMASNI_TURISTI has a unit root

Exogenous: Constant

Lag Length: 12 (Automatic based on SIC, MAXLAG=12)

		t-Statistic	Prob.*
Augmented Dickey-Fuller test statistic		-0.292769	0.9213
Test critical values:	1% level	-3.491928	
	5% level	-2.888411	
	10% level	-2.581176	

Null Hypothesis: D(DOMASNI_TURISTI) has a unit root

Exogenous: Constant

Lag Length: 11 (Automatic based on SIC, MAXLAG=12)

		t-Statistic	Prob.*
Augmented Dickey-Fuller test statistic		-6.978602	0.0000
Test critical values:	1% level	-3.491928	
	5% level	-2.888411	
	10% level	-2.581176	

Table –Values for the parametres of the model and additional statistics for the model – Number of arrived domestic tourists in Ohrid

Dependent Variable: D(DOMASNI_TURISTI)

Method: Least Squares

Date: 10/11/13 Time: 20:39

Sample (adjusted): 2004M08 2013M07

Included observations: 108 after adjustments

Convergence achieved after 12 iterations

Backcast: 2004M07

Variable	Coefficien		t-Statistic	Prob.
	t	Std. Error		
AR(12)	0.953202	0.010452	91.20168	0.0000
	-			
MA(1)	0.732789	0.062996	-11.63227	0.0000
R-squared	0.985924	Mean dependent var		-
Adjusted R-squared	0.985792	S.D. dependent var		136.8519
S.E. of regression	1585.653	Akaike info criterion		13302.58
Sum squared resid	2.67E+08	Schwarz criterion		17.59372
Log likelihood	948.0611	Durbin-Watson stat		17.64339
				-
				1.837187

LM Test

Breusch-Godfrey Serial Correlation LM Test:

F-statistic	0.251416	Probability	0.778170
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Obs*R-squared	0.356142	Probability	0.836883
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Autoregressive conditional heteroskedasticity

ARCH Test:

F-statistic	0.001957	Probability	0.964796
Obs*R-squared	0.001995	Probability	0.964378

Tables for number of arrived foreign tourists

Analysis of singular squares (original series)

Null Hypothesis: STRANSKI_TURISTI has a unit root

Exogenous: Constant

Lag Length: 12 (Automatic based on SIC, MAXLAG=12)

		t-Statistic	Prob.*
Augmented Dickey-Fuller test statistic		-0.018131	0.9542
Test critical values:	1% level	-3.491928	
	5% level	-2.888411	
	10% level	-2.581176	

Analysis of singular squares (differentiated series)

Null Hypothesis: D(STRANSKI_TURISTI) has a unit root

Exogenous: Constant

Lag Length: 11 (Automatic based on SIC, MAXLAG=12)

		t-Statistic	Prob.*
Augmented Dickey-Fuller test statistic		-5.828316	0.0000
Test critical values:	1% level	-3.491928	
	5% level	-2.888411	
	10% level	-2.581176	

Values for the parametres and additional statistics for the model – Number of arrived foreign tourists in Ohrid

Dependent Variable: D(STRANSKI_TURISTI)

Method: Least Squares

Date: 10/12/13 Time: 12:59

Sample (adjusted): 2004M08 2013M07

Included observations: 108 after adjustments

Convergence achieved after 12 iterations

Backcast: 2004M02 2004M07

Coefficien				
Variable	t	Std. Error	t-Statistic	Prob.

AR(12)	0.929834	0.064794	14.35070	0.0000
	-			
MA(6)	0.462317	0.056360	-8.202850	0.0000
	-			
MA(1)	0.500350	0.057883	-8.644218	0.0000
<hr/>				
R-squared	0.712878	Mean dependent var	94.25926	
Adjusted R-squared	0.707409	S.D. dependent var	2280.535	
S.E. of regression	1233.580	Akaike info criterion	17.10061	
Sum squared resid	1.60E+08	Schwarz criterion	17.17512	
	-			
Log likelihood	920.4331	Durbin-Watson stat	1.990913	

Breusch-Godfrey Serial Correlation LM Test:

F-statistic	0.013390	Probability	0.908101
Obs*R-squared	0.000000	Probability	1.000000

ARCH Test:

F-statistic	0.017436	Probability	0.895200
Obs*R-squared	0.017766	Probability	0.893966

Table for the number of realized overnights – domestic tourists

Null Hypothesis: D(NOKJEVANJA_D) has a unit root

Exogenous: Constant

Lag Length: 11 (Automatic based on SIC, MAXLAG=12)

	t-Statistic	Prob.*
Augmented Dickey-Fuller test statistic	-6.658319	0.0000
Test critical values:		
1% level	-3.491928	
5% level	-2.888411	
10% level	-2.581176	

Dependent Variable: LOG(NOKJEVANJA_D)

Method: Least Squares

Date: 10/14/13 Time: 21:13

Sample (adjusted): 2004M07 2013M07

Included observations: 109 after adjustments

Convergence achieved after 10 iterations

Backcast: 2004M05 2004M06

Variable	Coefficient	Std. Error	t-Statistic	Prob.
LOG(DOMASNI_TURISTI)	1.000507	0.056038	17.85394	0.0000
AR(12)	0.984740	0.012832	76.74194	0.0000
MA(2)	0.340607	0.091384	3.727202	0.0003
R-squared	0.994637	Mean dependent var	9.438636	

Adjusted R-squared	0.994535	S.D. dependent var	1.607487
S.E. of regression	0.118831	Akaike info criterion	-
Sum squared resid	1.496801	Schwarz criterion	-
Log likelihood	79.03267	Durbin-Watson stat	2.041074

Breusch-Godfrey Serial Correlation LM Test:

F-statistic	0.040800	Probability	0.960037
Obs*R-squared	0.000000	Probability	1.000000

ARCH Test:

F-statistic	0.038211	Probability	0.845393
Obs*R-squared	0.038918	Probability	0.843611

Analysis – number of arrived domestic tourists - Struga

Null Hypothesis: D(DOMASNI_STRUGA) has a unit root

Exogenous: Constant

Lag Length: 10 (Automatic based on SIC, MAXLAG=12)

		t-Statistic	Prob.*
Augmented Dickey-Fuller test statistic		-35.73586	0.0001
Test critical values:	1% level	-3.491345	
	5% level	-2.888157	
	10% level	-2.581041	

Dependent Variable: D(DOMASNI_STRUGA)

Method: Least Squares

Date: 10/15/13 Time: 18:56

Sample (adjusted): 2005M08 2013M07

Included observations: 96 after adjustments

Convergence achieved after 12 iterations

Backcast: 2004M08 2005M07

Variable	Coefficient	Std. Error	t-Statistic	Prob.
	t			
D(DOMASNI_STRUGA(-12))	0.966297	0.004912	196.7416	0.0000
	-			
AR(1)	0.571068	0.096825	-5.897920	0.0000

	-			
AR(2)	0.303670	0.093803	-3.237318	0.0017
	-			
AR(12)	0.167731	0.084351	-1.988479	0.0498
	-			
MA(12)	0.892260	0.027511	-32.43283	0.0000
<hr/>				
			-	
R-squared	0.981995	Mean dependent var	74.15625	
Adjusted R-squared	0.981204	S.D. dependent var	4311.897	
S.E. of regression	591.1532	Akaike info criterion	15.65271	
Sum squared resid	31801052	Schwarz criterion	15.78627	
	-			
Log likelihood	746.3299	Durbin-Watson stat	2.006789	

Breusch-Godfrey Serial Correlation LM Test:

F-statistic	0.295673	Probability	0.587952
Obs*R-squared	0.304129	Probability	0.581305

ARCH Test:

F-statistic	0.037507	Probability	0.846859
Obs*R-squared	0.038298	Probability	0.844845

APPENDIX – 2

THIS APPENDIX IS GIVEN IN MACEDONIAN LANGUAGE BECAUSE IT REPRESENTS A PRIMARY SOURCE FOR GAINING INFORMATION OF THE EXPERTS OF SITUATIONS OF MACEDONIAN NATIONALITY

Прашалник

За учесниците во туристичката понуда и промоција во општините од Југозападниот плански регион

За секое од прашањата кои се дадени во овој прашалник треба да се даде оценка, при што важи следната скала на оценување:

- Многу високо ниво Оценка 5
- Високо ниво Оценка 4
- Средно ниво Оценка 3
- Ниско ниво Оценка 2
- Многу ниско ниво Оценка 1

Одговорите на прашањата не мора да се резултат на посебна анализа. Важно е Вашето мислење за секое од прашањата.

Просторна положба		Оценка
1.	Оценете го нивото на вкупните потенцијали на Вашата општина според кое очекувате посета на туристи од соседните региони од државата и странство	
2.	Оцените го нивото на размена на туристи со соседните региони од државата или од земјите на нашето опкружување	
3.	Оценете ја отвореноста на регионот кон соседните региони за посета од страна на туристите (постоење на формалности, бариери и слично)	
4.	Оценете го нивото на движења на туристи низ Југозападниот плански регион кон соседните региони во државата и странство.	
5.	Оценете го нивото на изграденост на угостителски објекти на	

	транзитните правци кон соседните региони во државата и странство	
6.	Оценете колку атрактивностите (привлечни просторни содржини) и уреденоста на просторот се вклучени во туристичката понуда (туристички аранжмани) на туристичките агенции во општината	
Природни ресурси		Оценка
7.	Оценете го нивото на искористеност на секој од природните ресурси во дадени во продолжение во Вашата општина:	
8.	Планини	
9.	Клисури	
10.	Карстни полиња	
11.	Крајбрежни форми (плажи, клифови)	
12.	Пештери	
13.	Езера	
14.	Реки	
15.	Извори	
16.	Бањи	
17.	Водопади	
18.	Национални паркови	
19.	Заштитени резервати на растенија и птици	
20.	Споменици на природата	
21.	Издвоени заедници на птици и растенија	
22.	Ловишта	
23.	Други неопфатени објекти	

Културни ресурси		
Културно историски споменици		Оценка
24.	Оценете го нивото на искористеност на културните ресурси во Вашата Општина	
25.	Религиозни	
26.	Јавни градби (виадукти, аквадукти, амами, саат кули, сараји)	
27.	Тврдини	
28.	Археолошки објекти	
29.	Индустриско наследство (објекти кои во минатото служеле за производство)	
30.	Музеи и институции	Оценка
31.	Археолошки музеј	
32.	Етнографски музеј	
33.	Природно научен музеј	
34.	Визитор центар (Објект за презентација на определени настани, појави и процеси)	
35.	Галерии	
36.	Изложбени збирки	
37.	Настани и манифестации	Оценка
38.	Културни	
39.	Историски	
40.	Забавни	
41.	Религиозни	
42.	Спортски	
43.	Етнографско наследство	Оценка
44.	Традиционално градителство	

45.	Фолклор	
46.	Стопански активности	
Општествени услови (регулатива општествена и економска) во Вашата општина		Оценка
47.	Оцени го нивото на регистрирани домаќинства и фирми во општината за давање туристички услуги	
48.	Оцени го нивото на усвоени планови за одржлив развој на туризмот	
49.	Оцени го нивото на понуда на здравствени услуги за потребите на туристите	
50.	Оцени го нивото на постоечки документи со кои се поттикнува меѓурегионалната соработка во областа на туризмот	
51.	Оцени го нивото на координација со безбедносните служби во областа на туризмот	
52.	Оценете го нивото на донесени стратегии за долгорочни, среднорочни и краткорочни планови во туризмот	
53.	Оценете го нивото на донесени просторни - генерални и детални урбанистички планови за користење на земјиштето и инфраструктурата за потребите на туристичкиот развој	
54.	Оценете го нивото на донесени плански документи за безбедноста во туризмот (природно и културно наследство)	
55.	Оценете го нивото на одржување на зелените и рекреативните површини во функција на туризмот	
56.	Оценете го нивото на планови кои содржат елементи за проширување на содржините на престој на туристите во југозападниот плански регион (ботанички градини, тематски паркови, визитор центри)	
57.	Оценете го нивото на издвоени средства од Буџетот на Општината за развој на инфраструктурата во функција на туризмот (патишта, вода, струја, комуникации)	
58.	Оценете дали приходите од туристичка такса наменски се користат	
59.	Оценете го нивото на искористеност на средствата што ги издвојува државата и меѓународните институции во насока на туристички	

	развој	
60.	Оценете го нивото на организираност и меѓусебна соработка на професионалните организации од областа на туризмот и угостителството во функција на развој на оваа дејност.	
61.	Оценете ги активностите на Владата на РМ за промоција на Македонија	
62.	Оценете го кластерскиот пристап во организацијата на туризмот во југозападниот плански регион	
63.	Оценете го дејствувањето на професионалните асоцијации на хотелиери и агнеции (ХОТАМ и АТАМ) во насока на подобрување на туристичкиот развој на Вашата општина	
64.	Оценете ги активностите на Агенцијата за промоција и поддршка на туризмот во насока на туристичкиот развој на Вашата општина	
65.	Оценете го нивото на активност на здруженијата (планинарски друштва, феријални, извиднички, туристички сојузи) во вашата општина	
Комуникациски врски (сообраќајна поврзаност)		Оценка
66.	Оценете ја поврзаноста на регионот со неговото опкружување според различните видови на сообраќај дадени во продолжение:	
67.	Железнички сообраќај	
68.	Патен сообраќај	
69.	Авио сообраќај	
70.	Воден сообраќај	
71.	Оценете го квалитетот на сообраќајната инфраструктура	
72.	Оценете го квалитетот на сообраќајните средства што се користат за носење на туристи до регионот	
73.	Оценете ја информатичката и комуникациската поврзаност на регионот	
Рецептивни ресурси (потенцијали)		Оценка
74.	Оценете го квалитетот на услугите за сместување во општината	

75.	Оценете го квалитетот на комуналната уреденост (хигиена, одржливост)	
76.	Оценете го нивото на социјалната прифатливост на туризмот (колку населението прифаќа доаѓање на туристи во општината)	
77.	Оценете го нивото на обезбеденост на информатичка инфраструктура и содржини од областа на туризмот (промоција, продажба) во општината	
Развојни индикатори		Оценка
78.	Оценете го нивото на посетеност во согласност со расположивите ресурси во регионот	
79.	Оценете го нивото на содржини на престој за туристите –во општината	
80.	Оценете го нивото на потрошувачка на туристите во – општината	
81.	Оценете го нивото на обем и динамика на пораст на сместувачки капацитети во – општината	
82.	Оценете го квалитетот на аранжманите што се изведуваат во регионот од страна на туристичките агенции	
83.	Оценете го нивото на вработеност на стручни и професионални кадри во областа на туризмот	
Определување на потенцијалите		Оценка
84.	Оценете го нивото на квалитетот на управување со ресурсите (атрактивности, инфраструктура, сместувачки капацитети и др.) во – општината	
85.	Оценете го нивото на усогласеност на туристичката понуда на општината со туристичката побарувачка	
86.	Оценете го нивото на активности кои се преземаат за избегнување на сезоналниот карактер на туризмот во општината	
87.	Оценете го квалитетот на човечките потенцијали за развој на туризмот	
Интрарегионален рамномерен развој		

88.	Оценете го нивото на создадени меѓуопштински туристички производи (туристички аранжмани) од страна на туристичките агенции	
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Questionnaire

1. Select the range of your age:
 - a. Below 18
 - b. 19-30
 - c. 31-50
 - d. 51-64
 - e. Over 65
2. Your gender is:
 - a. Male
 - b. Female
3. Country of origin
 - a. Macedonia
 - b. Holland
 - c. Greece
 - d. Turkey
 - e. Bulgaria
 - f. Serbia
 - g. Albania
 - h. Belgium
 - i. Germany
 - j. Sweden
 - k. Other (specify which) _____
4. In Macedonia you are for:
 - a. The first time
 - b. The second time
 - c. Three or more times
5. How did you arrive in the region:
 - a. Individually
 - b. Organized in a group with a travel agency
6. What are the main reasons for your visit to this tourism destination?
 - a. Rest and relaxation
 - b. Visiting relatives and friends
 - c. Business reasons
 - d. Attending a conference, congress, seminar, and other form of education
 - e. Culture
 - f. Fun
 - g. Sports and recreation
 - h. Health
 - i. Religious reasons
 - j. Other, what: _____
7. Please indicate which natural attraction have you visited: _____

Место на анкетање _____

8. Please specify the level of your satisfaction from the natural values in the region?

- a. Very satisfied
- b. Satisfied
- c. Satisfied and unsatisfied in the same time
- d. Unsatisfied
- e. Very unsatisfied

If you have chosen to answer "unsatisfied" or "very unsatisfied", please indicate which the reason for this position is:

9. Which sites and structures of cultural heritage have you visited:

10. Are you satisfied with the cultural heritage that you visited in the area?

- a. Very satisfied
- b. Satisfied
- c. Satisfied and unsatisfied in the same time
- d. Unsatisfied
- e. Very unsatisfied

If you have chosen to answer "unsatisfied" or "very unsatisfied", please indicate which the reason for this position is:

11. Are you satisfied with the kindness of the hosts, tourism and catering workers:

- a. Very satisfied
- b. Satisfied
- c. Satisfied and unsatisfied in the same time
- d. Unsatisfied
- e. Very unsatisfied

If you have chosen to answer "unsatisfied" or "very unsatisfied", please indicate which the reason for this position is:

12. How satisfied are you with the prices and quality of the offer:

- a. Very satisfied
- b. Satisfied
- c. Satisfied and unsatisfied in the same time
- d. Unsatisfied
- e. Very unsatisfied

If you have chosen to answer "unsatisfied" or "very unsatisfied", please indicate which the reason for this position is:

13. How satisfied are you with the diversity of the offer:

- a. Very satisfied
- b. Satisfied
- c. Satisfied and unsatisfied in the same time
- d. Unsatisfied
- e. Very unsatisfied

If you have chosen to answer "unsatisfied" or "very unsatisfied", please indicate which the reason for this position is:

14. How satisfied are you with the accommodation:

- a. Very satisfied
- b. Satisfied
- c. Satisfied and unsatisfied in the same time
- d. Unsatisfied
- e. Very unsatisfied

If you have chosen to answer "unsatisfied" or "very unsatisfied", please indicate which the reason for this position is:

15. How satisfied are you with the restaurant offer:

- a. Very satisfied
- b. Satisfied
- c. Satisfied and unsatisfied in the same time
- d. Unsatisfied
- e. Very unsatisfied

If you have chosen to answer "unsatisfied" or "very unsatisfied", please indicate which the reason for this position is:

16. How satisfied are you with the offer of the vehicles and transportation:

- a. Very satisfied
- b. Satisfied
- c. Satisfied and unsatisfied in the same time
- d. Unsatisfied
- e. Very unsatisfied

If you have chosen to answer "unsatisfied" or "very unsatisfied", please indicate which the reason for this position is:

17. How satisfied are with the hygiene in the tourism facilities:

- a. Very satisfied
- b. Satisfied
- c. Satisfied and unsatisfied in the same time
- d. Unsatisfied

- e. Very unsatisfied

If you have chosen to answer "unsatisfied" or "very unsatisfied", please indicate which the reason for this position is:

-
18. How satisfied are you with the quantity and availability of information about the tourism sites and attractions in the region:
- a. Very satisfied
 - b. Satisfied
 - c. Satisfied and unsatisfied in the same time
 - d. Unsatisfied
 - e. Very unsatisfied

If you have chosen to answer "unsatisfied" or "very unsatisfied", please indicate which the reason for this position is:

-
19. How was the information provided to you about the tourism offer in the region where you live :
- a. Television
 - b. Internet
 - c. From friends
 - d. From a travel agency

20. Express your level of satisfaction from the promotional activities:
- a. Very satisfied
 - b. Satisfied
 - c. Satisfied and unsatisfied in the same time
 - d. Unsatisfied
 - e. Very unsatisfied

If you have chosen to answer "unsatisfied" or "very unsatisfied", please indicate which the reason for this position is:

-
21. Please indicate the degree of satisfaction of the internal traffic connections:
- a. Very satisfied
 - b. Satisfied
 - c. Satisfied and unsatisfied in the same time
 - d. Unsatisfied
 - e. Very unsatisfied

If you have chosen to answer "unsatisfied" or "very unsatisfied", please indicate which the reason for this position is:

-
22. Please specify the level of satisfaction with the setting of the tourism offer facilities (beaches, mountain trails, places of worship, speleology etc.):
- a. Very satisfied
 - b. Satisfied
 - c. Satisfied and unsatisfied in the same time
 - d. Unsatisfied
 - e. Very unsatisfied

If you have chosen to answer "unsatisfied" or "very unsatisfied", please indicate which the reason for this position is:

23. Are you satisfied with the information and communication infrastructure of the accommodation facility and the tourism resort:

- a. Very satisfied
- b. Satisfied
- c. Satisfied and unsatisfied in the same time
- d. Unsatisfied
- e. Very unsatisfied

If you have chosen to answer "unsatisfied" or "very unsatisfied", please indicate which the reason for this position is:

24. Are you satisfied with the entertainment offer in the region:

- a. Very satisfied
- b. Satisfied
- c. Satisfied and unsatisfied in the same time
- d. Unsatisfied
- e. Very unsatisfied

If you have chosen to answer "unsatisfied" or "very unsatisfied", please indicate which the reason for this position is:

25. Are you satisfied with the opportunities for recreation activities in the region:

- a. Very satisfied
- b. Satisfied
- c. Satisfied and unsatisfied in the same time
- d. Unsatisfied
- e. Very unsatisfied

If you have chosen to answer "unsatisfied" or "very unsatisfied", please indicate which the reason for this position is:

26. Are you satisfied with the offer of cultural events:

- a. Very satisfied
- b. Satisfied
- c. Satisfied and unsatisfied in the same time
- d. Unsatisfied
- e. Very unsatisfied

If you have chosen to answer "unsatisfied" or "very unsatisfied", please indicate which the reason for this position is:

27. Are you satisfied with the presence of the national cuisine in the region:

- a. Very satisfied
- b. Satisfied
- c. Satisfied and unsatisfied in the same time

- d. Unsatisfied
- e. Very unsatisfied

If you have chosen to answer "unsatisfied" or "very unsatisfied", please indicate which the reason for this position is:

28. Please indicate what is the amount of your expenditure over a day:

_____ euros.

29. What is missing in the tourist offer of the region:

30. Would you ever visit this region again:

- a. Yes with pleasure
- b. Maybe
- c. Probably not
- d. Never again

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