



Business Environment Reform and Institutional Strengthening Project (BERIS)
BERIS Project Coordination Unit
Ministry of Economy
Macedonia

-

Consultant Services

for

**Technical Assistance in Revision and Implementation of the National Strategy for
Tourism Development of the Republic of Macedonia 2009-2013**

Final Report

PLANETH.....

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| | |
|-------------------------------|---|
| Overall Objective | <p>The contract will contribute to the Revision and Implementation of the National Tourism Development Strategy 2009-2013.</p> <p>A “Master Plan Study for Tourism in the Republic of Macedonia” was produced in 2003 but has never been implemented. In 2008, the National Tourism Development Strategy 2009-2013 document was drafted by the Ministry of Economy of Macedonia, supported by the United Development Programme (UNDP) and United Nations World Tourism Organization (UNWTO). In April 2009, this Strategy was reviewed by the UNDP.</p> <p>The Ministry of Economy is now willing to get the strategic and operational keys of this National Tourism Development Strategy. This goes through a revision of its strategic approach towards tourist products design, methods and implementation.</p> |
| Purpose | <p>The purpose of this contract is to define a strategic and operational vision for tourism in Macedonia, by defining realistic and implementable tourist products. Those tourist products must be adapted to suitable targeted markets and be based on comprehensive operational actions plans.</p> |
| Results to be achieved | <p>The Consultant is expected to produce the following documents, <u>in English</u>:</p> <ul style="list-style-type: none">a) A draft final report including:<ul style="list-style-type: none">- an assessment of current tourist products- a design of newly redefined tourist products- renewed operational action plans for tourist products’ implementation regarding offer, governance, marketing, communication and promotion- a general action plan for the implementation of this renewed strategic vision for tourism in Macedoniab) A definitive final report refining all above mentioned items <p>All documents will be prepared in reference to the National Tourism Development Strategy 2009-2013, as required in the Terms of Reference. A separate report defining tourist products and marketing strategy will be prepared.</p> |
| Duration of assignment | <p>It is agreed that the official duration of contract has been 52 days from the official signature of contract (November 9th 2010) to December 31 2010, date of the BERIS project’s closing.</p> |
| Assumptions | <p>It is assumed that representatives of the Ministry of Economy-Tourism Department of the Republic of Macedonia, municipalities and local stakeholders would be willing to co-operate on providing, within the official assignment timelines of 52 days, the necessary inputs for the elaboration of the report.</p> |
| Risks | <p>Important stakeholders are not available for meetings and/or cannot pass on necessary information within the official timelines of 52 days.</p> |

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*"By ' Macedonia ' I understand the land whose essence can be found in its very existence; that
is, the land whose nature cannot be understood other than as existing.*

*The substance of the land Macedonia is that which IS in itself, and which can understand itself
only with and through itself, i.e. it is that land for whose existence no other land is necessary,
as a condition without which it could not have been created. Macedonia is infinitely beautiful
and human and every part of its beauty and humanity simultaneously expresses its eternal and
inexhaustible meaning."*

Ferid Muhic

Introduction to Macedonia



source: www.vimichelin.com

Located in the southern part of Balkan region, at the crossroads between European-continental and Mediterranean influences, the Republic of Macedonia is a small landlocked country of 25 713 km² bordered by Albania to the west, Kosovo and Serbia to the North, Bulgaria to the East and Greece to the South. In mid-2010, Macedonia has a population of 2 072 086 inhabitants¹.

Macedonia is crossed from Northwest to Southeast by the E 75 European highway², which directly connects Belgrade (Serbia) to Thessaloniki (Greece) through the cities of Kumanovo, Skopje, Veles and Gevgelija. Macedonia has thus a central and strategic transit position linking Eastern to Mediterranean Europe.



source : www.nationsonline.org

Macedonia's relief and climates are tightly linked to its geographical position.

Defined by a central valley formed by the Vardar River, parallel to the E 75 highway, Macedonia is characterized by its important natural borders. To the North East, Sar Mountains forms the border with Albania and Kosovo, whereas the Osogovo-Belasica mountains on the southeast form the border with Greece and Bulgaria. Ohrid lake is located at the border with Eastern Albania, Prespa Lake is shared with Albania and Greece, whereas Dojran Lake in the Southwest forms the border with Greece.

¹ July 2010 estimate from the CIA factbook: <https://www.cia.gov/library/publications/the-world-factbook/geos/mk.html#People>

² The E 75 highway links European countries from Norway to the isla of Creta, Greece

About 70% of the Macedonian land is made of high³ and medium mountains ranges, between which lie some tight valleys. This relief characteristics and geographical position provide the country with a transitional climate with both Mediterranean and continental influences: temperate Mediterranean in the Southwestern region, mountainous in mountain regions and mildly continental in most parts of the countries, with warm and dry summers and cold and wet winters.

The Republic of Macedonia of today is the result of rich and diverse history, which highlights a wealthy multicultural present. Being successively Greek, Roman, Byzantine, and Slavic until the XVth century, Macedonia's development has been funded on successive cultural identities, whose remains are still visible today. Its inclusion into the Ottoman Empire from the XVth century to 1913 has deeply marked the Macedonian's cultural heritage landscape, placing it between Occident and Orient worlds. After the Ottoman Empire decadence, "The Vardar Macedonia" included in the Kingdom of Serbs, Croats and Slovenians between World War 1 and World War 2 left room to an autonomous Macedonian republic within the Federation of Yugoslavia from 1943 to 1991. Since the break up of Yugoslavia in 1991, Macedonia has been an independent state whose capital is Skopje (668 518 inhabitants in 2006).

Today, Macedonia is characterized by a multicultural ethnic composition around a strong Slavic identity. The Slavic orthodox Macedonians majority (64.18%) cohabits with Albanians (25.17%) who dominate for a large part its western regions, whereas 26 other minorities, among which Turks (3.85%), Roma (2.66%), Serbs (1.78%), Bosniaks (0.84%), Aromanians (0.48%) and others (1.04%) feed the multiculturalism of Macedonian population.

Macedonia's multicultural aspect has been associated with diversity at all times. At the end of the XVIIIth century, as a tribute to Alexander the Great Empire's diversity of people's origins, the word "Macedonia" was popularised as a common noun in Latin European countries (Spain, Italy, and France) and Latin America to name a fruit salad. In the XIXth century, probably as a reference to the ethnic mixture of the Ottoman Macedonia, a French cook invented the Vegetable Macedonia ("Macédoine de légumes"), a salad of diced vegetables (red beans, carrots, peas etc.) eaten hot, or cold with mayonnaise. The word Macedonia is still used today for culinary purposes, and the corresponding dishes form part of the daily gastronomic customs in these countries.

The tourism development's paradoxical stake in Macedonia shows through this symbolic anecdote: Macedonia has now to justify and build contents behind its popular name, present in most foreigners' minds with historic and gastronomic connotations but with very few related actual contents. It has to build a coherent and overall tourist strategic product on a major asset: diversity.

The point is then about linking its diverse assets into a same identity strategic framework, for the tourist product "Macedonia" to be promoted, renowned and visited as an organized aggregation of linked assets: just as the different species in "fruit" or "vegetable Macedonia" put altogether are now inseparable from the "Macedonia" dish.

³ the highest peak in Macedonia is the Golem Korab (2 764 m) located at the border with Albania

1. MACEDONIA AS A TOURIST DESTINATION: ASSESSMENT OF CURRENT SITUATION

1.1 Tourism in Macedonia

1.1.1. Tourism performance

1.1.1.1. Macedonia's global tourism performance

The National Tourism Development Strategy 2009-2013 displays a certain number of tables measuring Macedonia's tourism performance and visitors' characteristics over the past few years, until variable deadline years (either 2008, 2007 or 2005). The most relevant of these tables are presented below, in order to set up an actualized overview of Macedonia's tourism in 2009⁴.

In 2009, Macedonia has welcome and hosted an overall number of 587 770 tourists, which represents an overall number of 2 101 606 overnights. Even though tourism has not still recovered its attendance level of 2000 (632 523 tourists), it has been in constant progression since the conflicts of 2001, which have had a serious negative impact on tourism performance.

Despite a loss of 2.9% since 2008, considered as a good tourism year (605 320 registered tourists and 2 235 520 overnights), the tourism attendance in 2009 remains within the scope of tourism general progression since 2002.

The table 1 overleaf shows the tourism attendance progress from 2000 to 2009, in terms of number of tourist accommodation registrations and number of overnights.

⁴ For certain accommodation and catering trade data, the 2009 figures could not be obtained from the State Statistical Office nor from the Ministry of Economy of the Republic of Macedonia.

Table 1: Evolution of Tourist Accommodation Registrations (Arrivals) and Overnights (2000-2009)

| | Tourists accommodation registrations | Overnights |
|-------------|--------------------------------------|------------------|
| 2009 | 587770 | 2 101 606 |
| 2008 | 605 320 | 2 235 520 |
| 2007 | 536 212 | 2 019 712 |
| 2006 | 499 473 | 1 917 395 |
| 2005 | 509 706 | 1 970 041 |
| 2004 | 465 015 | 1 865 434 |
| 2003 | 483151 | 2 006 867 |
| 2002 | 441712 | 1 850 384 |
| 2001 | 333308 | 1 254 582 |
| 2000 | 632523 | 2 434 639 |

The Tables 2 and 3 show a constant stagnation of tourists' accommodation habits. Accommodation in hotels remains by far most popular. In 2009, 60% of tourists visiting Macedonia stayed in hotels; however, hotel overnights represent only 35% of the total number of overnights, indicating a much shorter average length of stay in the hotels.

Table 2: Number of Tourists per Accommodation type- 2005-2009

| Objects | No. of tourists in accommodation | | | | |
|---------------|----------------------------------|---------------|---------------|---------------|---------------|
| | 2005 | 2006 | 2007 | 2008 | 2009 |
| Hotels | 309757 | 306112 | 341768 | 353178 | 353164 |
| Camps | 15337 | 17594 | 19509 | 17911 | 17164 |
| Private rooms | 90032 | 85231 | 89848 | 107679 | 98193 |
| Others | 94580 | 90536 | 85087 | 126552 | 119078 |
| Total | 509706 | 499473 | 536212 | 605320 | 587770 |

source : State Statistical Office

Table 3: Number of Overnights Stays in Accommodation- 2005-2009

| Objects | No. of overnight stays in accommodation | | | | |
|---------------|---|----------------|----------------|----------------|----------------|
| | 2005 | 2006 | 2007 | 2008 | 2009 |
| Hotels | 665459 | 659751 | 740294 | 758748 | 736032 |
| Camps | 121176 | 135585 | 141538 | 145418 | 127524 |
| Private rooms | 808356 | 745748 | 784109 | 881254 | 787614 |
| Others | 375050 | 376311 | 353771 | 450100 | 450436 |
| Total | 1970041 | 1917395 | 2019712 | 2235520 | 2101606 |

source : State Statistical Office

1.1.1..2.Macedonia's tourism infrastructure and capacities

In 2008, Macedonia counted less than 400 accommodation facilities (excluding private rooms), a number which has though been slightly increasing since 2004. The major change between 2004 and 2008 is observed in the evolution of types of accommodation facilities: the number of hotels, which has always been the most important tourist accommodation type, has lowered by around 30% between 2007 and 2008 and has been supplanted by the category "other buildings". The absence of details concerning this category's component cannot able to draw conclusions, but can make thinking about the development of new forms of accommodation among the newly created accommodation facilities in Macedonia. The table below provides nevertheless no figures concerning private rooms, which certainly cater for a very significant share of tourist stays in the country.

Table 4: Number of accommodation facilities (2004-2008)

| Types of accommodation facilities | Number of buildings | | | | |
|---|---------------------|------------|------------|------------|------------|
| | 2004 | 2005 | 2006 | 2007 | 2008 |
| Hotels and other equivalent accomodation capacities | 168 | 168 | 180 | 188 | 129 |
| Camps | 13 | 12 | 11 | 11 | 10 |
| Private rooms | - | - | - | - | - |
| Other accommodation facilities | 171 | 167 | 168 | 165 | 239 |
| Total | 352 | 347 | 359 | 364 | 378 |

Source: State Statistical Office

The table 5 below shows the predominance of private rooms in terms of capacities, with an important difference of around 15 000 beds more than hotel beds. As noted in table 4, the number of hotel beds has considerably decreased between 2007 and 2008 to the benefit of "other facilities" development⁵.

Table 5: Capacity of accommodation facilities (beds) : 2004-2008

| Types of accommodation facilities | Number of beds | | | | |
|--|----------------|--------------|--------------|--------------|--------------|
| | 2004 | 2005 | 2006 | 2007 | 2008 |
| Hotels and similar accomodation capacities | 14026 | 14042 | 14347 | 14567 | 9723 |
| Camps | 10908 | 11991 | 10435 | 10419 | 8718 |
| Private rooms | 25953 | 25818 | 25188 | 24998 | 25114 |
| Other buildings | 17844 | 17203 | 17218 | 17116 | 21951 |
| Total | 68731 | 69054 | 67188 | 67100 | 65506 |

Source: State Statistical Office

Between 2005 and 2008, the number of catering facilities in Macedonia has remained relatively stable (around 2000) as noticed in the table 6 below.

⁵ Dashboards with more detailed accommodation categories are displayed in the Strategy 2009-2013 (figures from 2005). Such detailed figures between 2005 and 2009 could not be obtained from the State Statistical Office nor from the Ministry of Economy.

The lack of information about the category “other catering objects”, which contains more than 50% of the total number of facilities, does not allow drawing conclusions on those catering facilities’ characteristics.

Table 6: Number of catering trade facilities (2005 and 2008)

| CATERING FACILITIES | | | | |
|---|-------------|-------------|-------------|-------------|
| | 2005 | 2006 | 2007 | 2008 |
| Classic restaurants | 357 | 299 | 326 | 326 |
| Coffee bars | 251 | 201 | 165 | 165 |
| Buffets | 218 | 178 | 146 | 146 |
| Workers’ restaurants | 76 | 70 | 64 | 64 |
| Kebapcilnici (traditional meat grill specialties) | 136 | 170 | 147 | 147 |
| Other catering facilities | 1152 | 1140 | 1158 | 1162 |
| Total | 2190 | 2058 | 2006 | 2010 |

Source: State Statistical Office

1.1.1..3.Macedonia’s tourism profile

In 2009, Macedonia has welcomed and hosted 328 655 domestic tourists, who represent the majority of welcomed tourists (56%) and 72,2% of the total overnights. A total of 259 204 foreign tourists (44%) all countries of origin confounded, have stayed in Macedonia in 2009, and represent 27,8% of the total overnights.

Table 7: Number of Tourists and Overnights in 2009

| Number of tourist and overnight stays in 2009 | | | | | | |
|---|---------------|---------------|---------------|----------------|----------------|---------------|
| | Tourists | | | Overnights | | |
| | Total | Domestic | Foreign | Total | Domestic | Foreign |
| Number of tourists | 587770 | 328566 | 259204 | 2101606 | 1517810 | 583796 |
| Proportion (%) | 100 | 56 | 44 | 100 | 72,2 | 27,8 |

The table 8 overleaf shows the evolution of tourists’ profiles between 2000 and 2009. The major statement is that domestic tourists have always been the most important tourists in Macedonia. It has to be noted, however, that 2009 has been the best relative score for foreign tourists’ arrivals in Macedonia since 2000 (44%). Until 2004, the proportion of foreign tourists in Macedonia had remained under the 35% barrier.

Table 8: Evolution of Tourists Accommodation Registrations and Overnight Stays of Tourists Resorts: 2000-2009

| Evolution of number of tourists and overnight stays of tourist resorts (2000-2009) | | | | | | |
|--|---------------|---------------|---------------|------------------|------------------|----------------|
| | Tourists | | | Overnights | | |
| | Total | Domestic | Foreign | Total | Domestic | Foreign |
| 2009 | 587770 | 328566 | 259204 | 2 101 606 | 1 517 810 | 583 796 |
| 2008 | 605 320 | 350 363 | 254 957 | 2 235 520 | 1 648 073 | 587 447 |
| 2007 | 536 212 | 306 132 | 230 080 | 2 019 712 | 1 501 624 | 518 088 |
| 2006 | 499 473 | 297 116 | 202 357 | 1 917 395 | 1 474 550 | 442 845 |
| 2005 | 509 706 | 312 490 | 197 216 | 1 970 041 | 1 527 053 | 442 988 |
| 2004 | 465 015 | 299 709 | 165 306 | 1 865 434 | 1 504 845 | 360 589 |
| 2003 | 483151 | 325459 | 157692 | 2 006 867 | 1 660 667 | 346 200 |
| 2002 | 441712 | 318851 | 122861 | 1 850 384 | 1 575 664 | 274 720 |
| 2001 | 333308 | 234362 | 98946 | 1 254 582 | 1 041 831 | 212 751 |
| 2000 | 632523 | 408507 | 224016 | 2 434 639 | 1 940 772 | 493867 |

Among the foreign tourists, it is possible to clearly distinguish a major foreign tourists' profile:

- the regional market, in which we included the former Yugoslav republics, as well as the neighbouring countries (Greece and Slovenia included) represents almost 60% of the total number of foreign tourists who stayed in Macedonia in 2009.
- the European Union countries (Greece and Slovenia excluded) represent less than 1/3 of the foreign tourists;
- the rest of the World hardly reaches 10% of the foreign tourists;



Table 9: Foreign Tourists Accommodation Registrations per Country of Origin

| Markets geographic segments | Countries | Foreign tourists | | | | | Percentage 2009 |
|------------------------------|--------------------|------------------|----------------|----------------|----------------|----------------|-----------------|
| | | 2005 | 2006 | 2007 | 2008 | 2009 | |
| Non EU regional market | Albania | 16 868 | 16 188 | 17 573 | 19 314 | 19 757 | 59,9% |
| | Croatia | 7 667 | 8 817 | 12 326 | 12 302 | 12 519 | |
| | Bosnia / Hercegov. | 4 021 | 4 240 | 4 887 | 4 443 | 4 672 | |
| | Montenegro | | | | 2 761 | 2 653 | |
| | Serbia | 39 147 | 38 208 | 44 661 | 45 134 | 38 744 | |
| | Turkey | 7 379 | 7 804 | 8 907 | 15 561 | 16 962 | |
| Regional EU countries | Bulgaria | 17 462 | 17 421 | 18 901 | 21 922 | 23 619 | |
| | Slovenia | 7 514 | 9 228 | 13 046 | 13 159 | 13 970 | |
| | Greece | 33 080 | 30 835 | 28 618 | 21 060 | 22 253 | |
| TOTAL regional market | | 133 138 | 132 741 | 148 919 | 155 656 | 155 149 | |
| Non regional EU countries | Austria | 2 736 | 3 490 | 5 186 | 5 315 | 6 437 | |
| | Belgium | 1 157 | 1 414 | 1 748 | 1 711 | 1 839 | |
| | Czech | 1 290 | 2 108 | 1 990 | 2 406 | 2 583 | |
| | Denmark | 1 165 | 1 018 | 1 168 | 1 748 | 1 338 | |
| | Finland | 835 | 885 | 1 018 | 1 088 | 1 220 | |
| | France | 3 017 | 3 133 | 3 594 | 4 278 | 4 914 | |
| | G.Britain | 5 099 | 5 318 | 5 789 | 7 690 | 5 309 | |
| | Germany | 6 995 | 7 659 | 8 840 | 9 655 | 9 795 | |
| | Holand | 4 218 | 3 809 | 3 705 | 5 606 | 4 988 | |
| | Ireland | 659 | 991 | 1 011 | 792 | 610 | |
| | Italy | 4 259 | 4 651 | 5 123 | 5 674 | 6 050 | |
| | Poland | 1 254 | 1 332 | 1 728 | 2 434 | 5 827 | |
| | Portugal | 365 | 511 | 611 | 552 | 601 | |
| | Romania | 1 733 | 1 662 | 2 137 | 2 240 | 2 677 | |
| | Sweden | 1 854 | 1 937 | 1 845 | 2 311 | 2 355 | |



| | | | | | | | |
|--|--------------------|----------------|----------------|----------------|----------------|----------------|---------------|
| | Slovakia | 554 | 636 | 1 496 | 811 | 1 140 | |
| | Hungary | 1 582 | 1 835 | 3 037 | 3 254 | 3 365 | |
| | Spain | 1 213 | 1 154 | 1 464 | 1 710 | 2 091 | |
| | Other EU countries | 2 286 | 2 961 | 4 114 | 7 045 | 9 486 | |
| TOTAL Non regional EU countries | | 42 271 | 46 504 | 55 604 | 66 320 | 72 625 | 28,0% |
| European Non EU countries | Island | 125 | 137 | 115 | 230 | 161 | |
| | Belorussia | 188 | 127 | 114 | 253 | 178 | |
| | Norway | 1 051 | 1 277 | 1 263 | 1 920 | 1 618 | |
| | Russia | 2 092 | 1 998 | 1 523 | 2 091 | 1 872 | |
| | Ukraine | 617 | 641 | 1 079 | 1 072 | 772 | |
| | Switzerland | 1 845 | 1 924 | 1 939 | 2 048 | 1 848 | |
| TOTAL European Non EU countries | | 5 918 | 6 104 | 6 033 | 7 614 | 6 449 | 2,5% |
| World countries | Australia | 1 563 | 2 014 | 2 755 | 3 165 | 2 784 | |
| | New Zeland | 143 | 264 | 183 | 273 | 203 | |
| | Canada | 851 | 906 | 969 | 1 160 | 1 257 | |
| | USA | 7 588 | 8 275 | 7 978 | 8 472 | 7 826 | |
| | Israel | 1 207 | 1 170 | 1 809 | 6 532 | 6 110 | |
| | Japan | 1 041 | 1 212 | 1 861 | 1 236 | 1 268 | |
| TOTAL world countries | | 12 393 | 13 841 | 15 555 | 20 838 | 19 448 | 7,5% |
| Other countries | | 3 496 | 3 167 | 3 969 | 4 529 | 5 533 | 2,1% |
| TOTAL ALL COUNTRIES | | 197 216 | 202 357 | 230 080 | 254 957 | 259 204 | 100,0% |
| TOTAL EU COUNTRIES | | 100 327 | 103 988 | 116 169 | 122 461 | 132 467 | 51,1% |

Data source: State Statistical Office (reset dashboard)

1.1.2. Tourism resources

Diversity in Macedonia is the main word to qualify its tangible and intangible heritages. The major stake of tourism development in Macedonia is now to find the appropriate sustainable marketing offers and enhancement tools to reveal them as key tourist resources.

Macedonia first determines itself by the variety and number of cultural heritage sites, directly inserted in its rural, mountain and urban landscapes. On its small geographical area of 25 713 km², are presently registered:

- 2 567 monuments of culture from the Neolithic to the Ottoman historic periods are presently registered
- 5160 archeological sites (while 108 are protected)
- 4681 memorial monuments
- 1286 urban, rural and commercial architecture
- 29 urban and rural complex of segments
- 1156 churches and monasteries
- 61 medieval, fortresses, bridges, towers
- 112 mosques
- 71 other objects from the 15th till the 19th century
- 22850 – icons

Source: INDOC Department, National Conservation Center, Skopje

The visibility, accessibility, and knowledge by the Macedonians themselves of these cultural heritage resources and sites are generally little developed, and above all contrasted. Whereas the UNESCO-registered Ancient Town and Lake of Ohrid has highlighted some now popular heritage facilities, and apart from major Macedonian archaeological sites, many other heritage spots of major historic value remain almost unknown, due to their maintenance conditions, geographic location, or/and poor accessibility due to lack of transport connections.

Macedonia's diversity of tourist resources also lies in its natural heritage, enriched by diverse reliefs and climate. The country shelters more than 50 lakes of variable sizes, from the 3 southern cross-border lakes of Ohrid, Prespa and Dojran to small glacial lakes located on mountains peaks between 1500 and 2300 meters high. It has 16 mountains which are higher than 2,000 m, the highest Macedonian peak being Mount Golem Korab (2764 meters) and also abounds of rivers, canyons, gorges, waterfalls and natural caves.

Macedonia has presently 3 National Parks, created between 1948 and 1958, which provide a protection legal framework to the extremely diverse and specific fauna and flora species present in the regions covered by these National Parks:

- Pelister National Park: 12 500 ha, sheltering in particular 2 beautiful glacial lakes (Golema and Malo), 88 trees species and 2 endemic fish species (Peliste and Pelagonija trouts);
- Mavrovo National Park: 73 000 ha, hiding thousand of plants and hundreds of registered birds (grey sparrowhawk and golden eagle) and mammals (bear, chamois, lynx and wolf);
- Galicica National Park, located between the Lakes of Ohrid and Prespa: 22 750 ha, containing in particular 1644 butterflies' species and an important number of amphibians and reptiles

Regarding this last fauna asset, the Galicica National Parks has as many richness as some European countries like Austria, Switzerland or Germany.

In the North of Prespa Lake also lies the game reserve Ezerani (2000 ha) for birds, and water species, with more than 200 animal species, out of which 60 are protected by the Convention of Berne and 3 displayed on the Red List as seriously endangered species.

Macedonia's tourist resources are also present in its intangible traditions and human heritage. Macedonian rich gastronomy and wine making traditions, traditional music, cultural feasts and celebrations, all fed by different historic and cultural influences, form the multicultural identity of Macedonia, and represent an authentic tourist resource in themselves. Those natural and intangible resources are however very under-used, not well promoted and badly-known, even at national level. A lack of spatialization, resources interpretation and marketing offer seem to restrict Macedonian resources to tourist guides contents with very few easy possibilities to assess and enjoy them on site.

The fundamental challenge of this Strategy revision is therefore to devise a strategic diagnosis and action framework aiming at highlighting and building the tourism products which will better reveal and market those important natural and cultural assets, in a cohesive and connected framework.

1.1.3. Tourism Governance

1.1.3.1. National and local governances

The National Tourism Strategy 2009-2013 outlines the tourism institutional and economic governance in Macedonia, its actors and functions:

- the **Ministry of Economy- Tourism section**, responsible for the general tourism policy, licensing and categorization of tourists and travel operators, enforcement of the legislation, production of promotional materials, general promotion of Macedonia as a tourist destination on international markets; organization of training for the tourism industry in marketing and management and public awareness programmes;
- the **Agency of Promotion and Support of Tourism**, created by the Law on Establishment of Agency for Promotion and Support of Tourism, enacted in July 2008, with tasks dedicated to external promotion and promotion supports diffusion;
- **the municipalities**, which have, in accordance with the national policy of decentralization, responsibility for tourism planning and development. Some of them (Ohrid, Tetovo, etc.) have elaborated plans and strategies for tourism development in their respective areas. They are responsible for controlling the complementary accommodation and collecting the statistics and bed taxes from these;
- **the Hotel Association of Macedonia (HOTAM)**, a representative body of the hotel sector, which gathers 56 hotel members, out of 180 hotels in Macedonia and 26 associate members (restaurants, transport companies, tourism faculties...);
- **the Economic Chambers for Tourism (ECTM)**, which aims at preparing the ground for improving the business conditions for the tourism industry;

- the **Association of Travel Agencies of Macedonian (ATAM)**, comprising 72 members, which represent the majority of travel agencies in Macedonia. Most of them propose outbound travel, and only 4-6 of the members are incoming travel agencies.

Further to the description of this organization, delivered in the Strategy, it is needed to add a critical analysis and critical overall point of view on this tourism governance pattern. Two main weaknesses of the actual institutional tourism governance in the country are observed:

- the scarcity of the available financial and other means;
- the absence of any significant dialogue and cooperation among the key stakeholders and actors.

These two weaknesses combine to maintain a lasting detrimental impact on any structural development or promotion effort.

On the central level, the dichotomy between the Tourism Department of the Ministry of Economy and the National Agency for Promotion and Support of Tourism has not been entirely clarified and the two bodies still overlap in certain functions, which not only contributes to definitely weaken already poor available means, but also fails to provide an appropriate visibility of the central governmental action and the corresponding needed guidance to other key tourism actors intervening downstream.

The cooperation in tourism development and promotion between the central Government and the Local Authorities is presently too weak; it does not focus on key issues of shared relevance and is more than often hampered, if not fully neutralized, by political rivalry issues and criteria. This is a matter of concern since the decided decentralization in the country assigns important functions and tasks to Municipalities in terms of local development in general and of the tourism development and follow up in particular, and such responsibilities can only be fully implemented if an appropriate coordination is developed among the local, the regional and the central levels.

1.1.3..2. Towards a regional governance?

As a superposition to the 84 municipalities⁶ in the country, a regional level of development action has also been introduced in Macedonia (see box *“Balanced Regional Development in Macedonia”* on the following page) as an integral part of the “acquis communautaire” and in order to enable the country to absorb and manage EU structural funds. Although the decided breakdown of the country into 8 planning regions at NUTS 3 level does not necessarily coincide with any historical regions with clear identity, such as could be usefully taken as basis for tourism promotion, the achievements in this domain are already very important. Indeed, all the regions have already drafted their respective development plans, and each and every of these plans contains relevant coverage of the tourism sector – appraisal of potentialities and planning for development.

⁶ out of which 10 constitute the City of Skopje, as a distinct unit of local self-government. Macedonia had been previously composed of 123 municipalities since September 1996.

Focus: the 8 Statistical Regions of Macedonia

| Region | Population |
|--------------|------------|
| Eastern | 203 213 |
| Northeastern | 173 814 |
| Pelagonia | 221 019 |
| Polog | 304 125 |
| Skopje | 571 040 |
| Southeastern | 171 416 |
| Southwestern | 221 651 |
| Vardar | 133 248 |



Source: www.wikipedia.org

Balanced Regional Development in Macedonia

In Macedonia there are 8 planning regions at NUTS 3 level with substantial disparities which represents a great challenge for the policy of the balanced regional development. The basic characteristics of the 8 Regions indicate that they all have relatively equal natural resources potential, equal cultural and historical heritage; however there are still disparities in the level of the economic development among them. According to the decision of the Government of Republic of Macedonia, on the classification/ranking of the planning regions based on their economic development, the most developed region is Skopje region, while the least developed is the North East Region. The parameters that are used for this classification are the development index, economic social index and demographic index. To estimate the socio-economic index the following parameters are used: gross domestic product per capita, budget revenues per capita, the growth of the added value of the non financial sector. The development index is an average of the socio-economic and demographic index. The share (amount) of funding of the projects for regional development is determined on the basis of the classification of the regions.

The distribution of funding of projects among the regions is a very important pre-condition for the polycentric model of regional development. Almost all planning regions will receive double amount of funds compared to the Skopje region which is going to receive 6.4% of the total allocated funds from the National budget for regional development. The funds are basically used for reducing disparities among the regions and within the regions. The receiving of funds requires well prepared projects, which depends on the capacities for planning and implementing regional development projects.

According to the Law Macedonia should spend minimum of 1% of GDP for balanced regional development. The following modalities of financing are provided for by the Law: capital investments, grants, financing and co-financing of planning and project documentation, financing of build institutional capacities for regional development as well as state aid in a form of loans, credit guarantees, tax incentives, credit insurances, subventions and other instruments. The use of the funds for regional development should follow the principles of: good coordination, partnership, transparency, sound financial management and control. Good coordination of the resources and instruments in order to better achieve the goals of regional development.

Efficiency and cost effectiveness of the instruments for promotion of balanced regional development means that despite the level of development, the planning regions should develop solid capacities for preparation and implementation of good projects. According to the Law, the allocation of the funds from the national budget, is made on the basis of the classification of the regions as per their level of

development, however the distribution of the funding will be done on the basis of well prepared projects. According to the Law, 70% of the available funding will be used for projects for balanced regional development, while the rest of 30% percent will be directly transferred to the municipalities, 20 % will be used for the areas with specific development needs and 10% for rural development. Having in mind the good coordination principle all the proposed projects by municipalities should be in compliance with the development plans of the relevant region. The national Budget for 2010 provides around 3.3 million euro out of which around 1.7 million euro for the Ministry of Local self government, and around 1.6 million euro for the Biro for Balanced regional Development.

Source: Governmental communication on balanced regional development

It should also be underlined that the preparation of such regional development plans has followed wider consultation procedures, which allow considering these plans as fairly representative of the collective development vision by its main stakeholders, including the local authorities, the private sector and the civil society at large.

Regional development bodies (agencies) should therefore be invited into the overall “organization chart” of the key tourism development actors, in order to fill the gap between the central and the local levels and also to capitalize on the opportunities and sources of both national and international funding the regional development can mobilize in Macedonia today and in the years to come.

1.1.3..3. National Parks

Another leverage for better structuring of the tourism development and promotion institutional framework is to be sought in the National Parks, which, by definition, cover areas of particular natural and cultural heritage wealth and which, in best EU practices, act as leading actors in developing sustainable forms of tourism and in promoting innovative tourism offers based on such natural and cultural resources. The situation in Macedonia has not yet reached that level, and the example of Mavrovo National Park could be taken into consideration, thanks, in particular, to its bilateral cooperation with the Italian Government and the Italian national park developers and experts (see the box on Mavrovo National Park).

Taking also into consideration the potentiality of increasing the number of national parks in the country (Sar Planina project is reportedly in the pipeline), the National Park level and framework should be used as a relevant leverage for an integrated coordination of the overall tourism development and promotion action within its territory and for introduction of innovative and nature-friendly tourism products and services, which can range from discovery and thematic visitation to new integrated products, including labelled accommodations etc.

Mavrovo National Park

Founded exactly 60 years ago in 1949, the 73,000-hectare National Park Mavrovo is the largest of three national parks in the Republic of Macedonia. About an hour and a half west of the capital Skopje, the Park stretches between the towns of Gostivar, Debar, and Kicevo, and shares partial borders with Albania and Kosovo. Nature has blessed this place. Nestled between the mountains of Bistra, Shara, Deshat, and Krcin, Mavrovo is also home to what is perhaps the most beautiful river in the country, the Radika. Mavrovo park also features a man-made lake of the same name. Mavrovo Lake trout is a known delicacy for fish lovers and a substitute for the endangered Ohrid trout. The lake itself, albeit small, is staggeringly beautiful.

The National Park has been subject to a bilateral cooperation project that aims to bring Mavrovo up-to-date

with EU standards in national park management. This three-year project, started back in 2008, has a total budget of three million Euros. Half of this is financed by the Italian Foreign Ministry, 35 percent is contributed by the Park Authority, and the rest is co-financed by the implementing partners: UCODEP and GVC. Local municipalities are also partners in the project. "A major component of the project is to outline a new and modern management plan – compatible with EU standards: this is a comprehensive strategy which, among other things, includes creating complete registries of all the flora and fauna and plans for their conservation, plans for the utilization of the forest, tourism, the local economy, the financial management of the Park, etc. Within this framework, the forest management plan is an issue of critical importance: at present, the Park authority, which is completely self-financed, generates over 90 percent of its revenue from selling timber. In Europe, national parks are generously funded by governments. Even though wood cutting in the Park is tightly controlled, the fact remains that timber is the sole major source of revenue. UCODEP and GVC want to change this. The way to go would be to stimulate tourism and local economic activity. Mavrovo is a well-known ski destination in the country, but the season is short and snow has been scarce in recent years. Creating the conditions for tourism throughout the year and promoting the Park internationally are important objectives. The project plans to invest a lot to meet these goals. A camp will be built, including wooden cottages. Tourist info points will be set up, and the Park will be promoted at international fairs. In addition, the project plans for important awareness-raising and environmental education work to be conducted in local schools. It also comprises a strong waste management component, including investment in equipment. There is no systemic pollution in the vast Park area, but garbage produced by households and tourists is everywhere.

International cooperation is also an important part of the project. GVC has recently paired the Park with a counterpart in Italy, Parco Tosco-Emiliano. The two parks have agreed to work together on future projects. By 2011, when the project is slated to end, the National Park of Mavrovo should be better prepared to eventually become a true European natural park.

Source: Risto Karajkov "Regards from Mavrovo", February 2010

1.1.3..4. Civil society

Finally, the initiatives of the civil society actors should not be under-estimated since they can represent a very effective mechanism and leverage for better coordination and cooperation of tourism stakeholders in the current institutional landscape of the country.

The example of the Tikves Wine Route Foundation (TWR) is certainly very relevant, for the following main reasons:

- the TWR has been conceived as a cross-cutting NGO structure with a privileged status of Foundation, allowing it to raise funding for its development activities and initiatives;
- it has already federated a number of relevant actors from various horizons: local authorities, wine producers, tourism actors, etc;
- it has the fundamental advantage of positioning its image over the historical wine region of Tikves, which is a strong resource not only for Tikves wine and tourism community-based development but also for the promotion of a wine tourism destination with clear identity;
- it very usefully "fills the gap" in the institutional scenery of the region, due to poor cooperation and coordination among the local authorities and between them and the central government.

TWR should thus be regarded as an innovative form of thematic approach capable of catalysing otherwise centrifugal forces into one streamlined and well focussed effort of developing and promoting a thematic destination of "Tikves Wine Destination". This concept should be further supported and where relevant replicated, in order to serve as a recipe for

new approaches combining territories and themes, on a number of relevant potentialities identified in the country.

1.1.4. SWOT analysis of Macedonia as a tourist destination

| STRENGTHS | WEAKNESSES |
|---|--|
| <ul style="list-style-type: none"> • Macedonia is a new country in tourism development with well preserved cultural and natural heritage; • More particularly Macedonia boasts a very old history and a prestigious reference (Alexander the Great) and is, with Ohrid, one of the major sites of the Mediterranean World; • Macedonia is at the crossroads of Roman, Slavic, Greek and Ottoman worlds, offering a very dense cultural diversity, which is a strong asset; • Its mountain eco-tourism heritage and resources are very interesting and very well preserved; • The wine tourism “niche” is also an important asset, very trendy today; • More generally, the quality of agricultural produces and culinary and gastronomic heritage and know how; • A privileged situation on the axis North Europe – Athens – Istanbul. | <ul style="list-style-type: none"> • Tourism facilities and infrastructures are mostly obsolete (except for Skopje where new hotels have been built) and of insufficient quality regarding actual norms and standards and the offer in the neighbouring countries; • The image of a country “in war”, although not true, can disappear over a longer period of time, in the minds of poorly informed European markets; • The Government does not seem to have as yet secured adequate financial means for implementation of indispensable facilities and infrastructures (among other, tourism signage) and in order to set up the basis for tourism development and attract investor and tour operators; • The means allocated to tourism observation and promotion and to heritage protection are still insufficient; • The breakdown of competences and the coordination between the central government and the local authorities are still far from being appropriate; • The tourism welcoming facilities and tourism information offices have too low objectives and too limited means; • The cooperation between the public bodies and the private operators is sporadic but not yet sufficient; • The image of Macedonia as a country is still fuzzy, and its belonging to the Balkans, a better identified region, is not known enough; • Therefore Macedonia does not meet the conditions to be already now integrated in the offerings of European tourism operators. |

| OPPORTUNITIES | THREATS |
|---|---|
| <ul style="list-style-type: none"> • Macedonia belongs to the « family » of former Yugoslavia countries among which the already developed tourism exchanges have been maintained ; • Conflicts are over and tensions with certain neighbouring countries are disappearing; • Macedonia is part of the Balkans which appear for the European markets as both a new and preserved destination to discover (heritage, nature & culture, etc); • Interest of the Slavic markets for one of their southernmost countries; • Programmed integration in the EU; • Growing worldwide interest in the Mediterranean countries; • Possibility to develop new tourism infrastructures well conceived within the framework of sustainable tourism development. | <ul style="list-style-type: none"> • Global competition of neighbouring countries which offer easily accessible Mediterranean littoral for regional markets, including the national market itself: Greece, Turkey, Croatia, Montenegro, Albania; • Strong competition on certain product segments: religious heritage (Bulgaria), wine tourism (Slovenia, Bulgaria), national parks and natural environment (Bosnia, Montenegro); • A too inert setting up of a professional tourism organization and of development of up to date infrastructures and facilities; • Difficulties to be a visible destination in Europe, against Greek competition, the name of Macedonia and the issue of the historical reference to Alexander the Great. |

1.2 Promotion actions issued to promote Macedonia as a tourist destination

1.2.1 Description of promotion actions led since 2007/2008

1.2.1.1. Ministry of Economy- Tourism Department

In the last 3 years, the Ministry of Economy has undertaken the following activities and produced the following promotional materials:

- Preparation and printing of promotional materials for separate segments of tourists and reprint of existing promotional materials. The invested budget of 4,500,000.00 denars was devoted to the following actions:
 - preparation of promotional materials for various tourism segments in several foreign languages: flyers, posters, bags and folders;
 - preparation, design and printing of a Tour Guide of the Republic of Macedonia;
 - production of promotional CD material making flyers, posters, bags and folders.
- Representation of Macedonia at the international tourism fairs. A total amount of 9,000,000.00 denars has been spent for that purpose, with the participation at tourism fairs in Utrecht, Ohrid, Ljubljana, Sofia, Berlin, Moscow, Belgrade and London.
- Subsidies to business forums and other events (around 1,000,000.00 denars). Various tourism events and forums held by the tourism actors that did not have enough funds for organization of such events have been subsidized.
- Campaigns for selection of the best resort, council, best quality manager, receptionist etc., for a total budget of 1.000.000, 00 denars.
- Presentation of other states that do not participate on fairs or markets and use only direct contacts with various offices (500,000.00 denars).
- Fostering the development of rural tourism by choosing rural destinations which would be a subject to promotion, to be followed by investments in equipping the accommodations and the formation of a tourist info centre.
- Tourist and leisure development projects such as “Aqua Park”, “Winter Recreational Music Centre” in Krusevo, Kozhino and Cocev Kamen projects, development projects of monastery tourism and of wine tourism: 10 580 000.00 denars.
- The remaining funds were spent on legal and cooperation actions: establishment of the Agency of Promotion and Support of Tourism in Macedonia, bilateral agreements on cooperation in tourism, staffs training programmes, etc.

Year 2009

The 2009 Development Tourism programme planned a budget of almost 37,995,000.00 MKD, which represented 10,000,000.00 MKD less than in the 2008 programme. This 2009 budget projected investing in the following activities:

- Preparation and printing of promotional materials in separate segments :
 - Reprint of existing materials from 2008

- Reprint of Tour Guide of the Republic Macedonia, in English, Macedonian, Albanian and print of its translation into German and Russian.
 - Production of promotional material and CD
 - Web site for tourism <http://travel2macedonia.com.mk/macedonia-tourism>
- Representation at international fairs and markets: Utrecht, Ohrid, Ljubljana, Tel Aviv, Sofia, Berlin, Moscow, Belgrade, Cologne, Kiev and London;
 - Cooperation with foreign tour operators;
 - Promotion of Macedonian tourism in foreign publications and TV media.

Year 2010

In the course of 2010 has been projected a total of budget of 33,265,000.00 denars, for the following activities:

- revision and implementation of "The Strategy for Tourism Development in Macedonia 2009-2013"
- analysis of tourist needs surveys and interviews;
- revision of tourism legislation;
- feasibility study for tourism development in the Shara mountain region, implementation and development of the project for Popova Shapka resort;
- analysis of the potential for development of transit tourism;
- several projects specifically highlighting:
 - alternative forms of tourism ("Fostering the Development of Alternative Types of Tourism" project
 - the signage of tourist areas
 - the extension of City Light project maps
 - international relations development in the tourism industry
 - subsidies for various tourist events and forums
 - organized subsidizing of foreign tourism activities.

1.2.1.2. Agency for Promotion and Support of Tourism

In 2009, the Agency for the promotion and support of tourism issued and reprinted the following promotional materials:

- tourist guide of Macedonia
- flyer Macedonia-Cradle of Culture, Land of Nature
- thematic brochures: General, Archaeology, Spa and Rural tourism, and preparation of the flyer for camping tourism.

As informed by the Agency, its budget in 2009 and 2010 has been between 1,200,000.00 to 2,000,000.00 denars.

1.2.1.3. Association of hotels, restaurants and cafés of Macedonia- HOTAM

The HOTAM has established cooperation to take part in tourism fairs with the Department for Tourism within the Ministry of Economy of Republic of Macedonia. This cooperation was based on the following arrangement:

- the Ministry covers the expenses for rental of stands at the international fairs;
- HOTAM is in charge of the stands equipment, of the entertainment and promotional materials and of the organization of the stand's works;

This collaboration took place for the following fairs:

- Tourism Exchange ITB Berlin
- The fair MITT Moscow
- tourism fair ITF Belgrade
- International tourism fair Novi Sad, Serbia (in 2007 the representation of the Macedonian tourism, culture, folklore and traditions for the first time, are organized in a fully authentic stand and in the style of an old Macedonian house);
- international tourism market, Vakantiebeurs Utrecht, the Netherlands
- fair in Kiev
- WTM - London,
- International Market "Vakancija and Spa Expo - Sofia ,
- fairs in Ljubljana, Florina, Tirana, Albania

HOTAM in cooperation with the Department of Tourism has also taken part in other fairs:

- the fair for tourism and travel in Turkey, at the invitation of the TURSAB
- The International Stock Exchange and fair for tourism METUBES - Budva (Montenegro) and Vrnjacka Banja (Serbia)
- International tourism fair at Veliko Trnovo (Bulgaria),
- international tourism market in Essen (Germany),
- Embassy of the Republic of Macedonia in Kiev (Ukraine): tourism presentation and cocktail reception;

At the same time, HOTAM cooperated with the Ministry of Economy in the preparation and modifications of certain laws and by-laws for tourism and catering.

In 2006, the budget of HOTAM for promotion in international fairs was 10,000 euros, 15,000 euros in 2007, and 20,000 Euros in 2008 and 2009 (all included). HOTAM also has produced several promotional materials including:

- printing of the tourist map of the Republic of Macedonia
- organization and preparation for printing the catalog in 2006 (budget of 15,000 euro/year in 2007 and only 5,000 euros in 2008)

HOTAM has also organized promotional tours by inviting tour operators and journalists from Poland, Serbia, Ukraine, Croatia, Russia, Germany, Bulgaria, Sweden, tour operators from France, Russia and Israel in cooperation with the TA Aragosa, representatives of the Turkish Association for the Tourist Agencies- TURSAB, and the newly formed Association for Tourism in Slovenia. Its annual budget for promotional tours is 5,000 euros.

With the establishment of the Ohrid Tourism Fair since 2007, HOTAM took main contribution in the organization of the same Fair in 2008. Within this scope, a Forum for Tourism took place with the support of the Faculty of Tourism and Catering of Ohrid to work on the prospects of creating a "Balkans Tourist Product". This Forum was attended by representatives from the national tourist industry and from other countries (Former Yugoslavia Republics, Albania and Bulgaria). The organization budget spent for this event was 50,000 euro.

HOTAM also established and organized Gastronomy competitions at national level and participation in such culinary events on the regional Balkans level. The budget earmarked for the organization of such events is 20,000 euros per year.

1.2.1.4. Private promotion initiatives with governmental support

- Exploringmacedonia.com, National Tourism Portal

Exploringmacedonia.com is a private organization managing Macedonia's national tourism portal www.exploringmacedonia.com, which was launched in 2005 with the assistance of the USAiD and officially supported by the Ministry of Economy in a public-private partnership. It provides a general overview of tourism and offer online accommodation bookings functions.

- Macedonia Timeless

Since October 2008, a series of 8 thematic promotional videos have been produced by private production companies (Senka Film, Pristop MK and New Moment, with the support from the Government of the Republic of Macedonia) in order to "promote awareness of Macedonian tourism opportunities":

- Macedonia timeless (promotion of the overall destination)
- Macedonia tourist destination (2nd video, promotion of the overall destination)
- Ohrid City of Light
- Macedonian temples
- Archaeology
- Macedonian wine
- Mountains
- Macedonian food
-

These videos have been released in 9 languages: Macedonian, English, Turkish, Russian, Italian, Dutch, German, French, Spanish and Albanian, and are currently available online at <http://www.macedonia-timeless.com/>

The first video "Macedonia Timeless" premiered on December 24 2008 and was then broadcast on CNN and CNN international on December 25. It won the first prize at the International Festival for Tourist films in Warsaw, Poland. The second "Macedonia Timeless" aired for the first time on CNN and CNN international on June 15 2009. It won an award in the festival for tourist commercials APT&TUR in Portugal.

1.2.1.5 Municipalities

Macedonian municipalities elaborate and issue their own promotion tools (brochures, leaflets, videos) with contrasted promotion budget and contrasted dynamism and quality. Generally speaking, no real promotion policy/strategy is carried out by the municipalities, due to generally very poor available promotion budgets. A detailed survey and study of promotion actions in municipalities should be carried out in order to measure the dynamism of municipalities with tourism development interest regarding the promotion of their own destinations.

1.2.2. General Statements about Promotion Actions

This brief inventory of promotion actions carried out in the last 2-3 years by Macedonian national tourist organizations leads to three major findings:

- all efforts have been made to promote Macedonia at the broadest international level (international fairs, CNN broadcasting, etc.);
- all efforts have been made to promote Macedonia as a whole and diffuse a global image of Macedonia, with very little transparency on the support-tourist products, which are still at the embryonic stage;
- these promotion actions and documents appear as little territorialized, except in the case of Ohrid, which is clearly presented and promoted as an international brand.

It could be seen from the above that there has been hardly any real cooperation with the local levels (municipalities, civil society) for the national tourism promotion, since one would have imagined that if any municipalities had been invited by the national level to join promotion actions in their capacity of territories for tourism development in Macedonia, they would have taken an active part in such promotion actions. There is therefore a need and an opportunity to design a new promotion governance pattern involving a panel of local actors, as representatives of specific tourism thematic or/and geographical tourism facets.

The precondition of this new governance pattern proposal is to elaborate a new tourism development framework such as which will give rise to strong identity tourist products fully represented by involved local representatives, as targeted in the present report.

1.3 Critical review of the National Strategy for Tourism Development 2009-2013

The National Tourism Development Strategy 2009-2013 provides an exhaustive overview of all issues and topics, directly and indirectly related to tourism development and promotion strategy. However, the document shows a certain lack of operational effectiveness and practicability, generally taken and for the period 2009-2013. This finding has led to the need of revising its conceptual and methodological approach, in order to have in hands a real ly operational and easily readable guide for implementation of tourism development actions over the next years.

This lack of operational effectiveness lies in the absence of a clear strategic framework in the Strategy. The most significant sign of this weakness is that Part I “The Vision for Macedonian Tourism”, added during the Strategy review in April 2009, has remained fairly empty, with only 4 lines written in this part, stating that, by 2013, Macedonia would have established its image as an European destination, but without any indication as for which tourism products this image would be based on. The first two Objectives of the final action plan in terms of tourism products and services also confirm the Strategy’s inefficiency: they are indeed about “Creating iconic products” and “Creating general tourism products”, whereas the main point of the Strategy is precisely to define these products and to formulate actions for their appropriate implementation.

At no moment in the Strategy, not even in its conclusions and global action plan, is highlighted a clear image of what Macedonia represents. All Macedonian assets are listed with almost no thematic approach, enumerating as products segments a mix of spots, sectors and tools. This is therefore regrettably limited to a “Wikipedia” type compendium, very difficult if not impossible to be used on either central or other downstream levels of tourism development and promotion action.

In addition to some assertions which could be debated, the main default of the Strategy concerns its framework, structure and method. It seems that it goes straight to the details, hoping that it would at the end form a strategic framework, whhreas only an inverse approach has proved efficient: the strategic framework comes first, and can be detailed afterwards.

1- No insertion in the Strategic National Framework

The National Tourism Development Strategy takes into very little account the official strategic framework previously set up at the governmental/ national level (see the Box overleaf).

In particular, the Spatial Plan of the Republic of Macedonia (2004-2020), had set up a spatial and territorial framework regarding tourism in Macedonia. It constitutes an ambitious planning tool which has been drafted with the participation of an impressive task force of multi-disciplinary experts.

| National framework | Comments |
|--|--|
| The Programme of the Government 2006-2012 | The NTDS omits to position its orientations and proposals with regard to this Programme, in general and in particular as concerns the Governmental decision to prepare a Macedonian Village project. |
| National Development Plan (NDP) 2007-2009 | The NTDS omits to position its orientations and proposals with regard to the NDP, in general and, in particular, it does not comment on or update the status of the larger-scale and smaller projects which were reportedly programmed in the NDP. |
| Spatial Plan of the Republic of Macedonia (SP) 2004 - 2020 | This important planning tool was reportedly prepared by a large multi-disciplinary team of experts and offers the advantage of proposing the county's breakdown into ten (10) tourist regions. The NTDS omits to deliver relevant appraisal of this breakdown and its incidental utility for the tourism development and promotion strategy, with regard, also, to the breakdown of the country into eight (8) functional regions. |

What is more, the National Tourism Development Strategy appears in total disconnection from the adopted national Spatial Plan of Macedonia (SPM). Linking the Strategy to the Spatial Plan's territorial reference would have helped in reaching the needed synergy and cross-fertilization of strategic planning instruments and bringing its contribution to an integrated and better consolidated approach. It would have had better chances of adoption by the concerned stakeholders on regional and local levels. The box below briefly summarizes the tourism development approach of the Spatial Plan of Macedonia, as presented in its final document approved in June 2004.

| Spatial Plan of Macedonia – Tourism Development and Tourist Areas Organization – 2020 |
|--|
| <p>Development Goals</p> <ul style="list-style-type: none"> - Comprehensive valorization of natural and man-made potentials for tourist offer, both for foreign and domestic tourism, differentiated by tourist values and contents, in line with the trends of international and domestic tourist demand; - Definition of tourism types to be developed in specific areas, depending on spatial and other development factors, by achieving optimum in tourist offer specialization; - Definition of relationships and interdependence among individual tourist spatial entities and other areas and spatial units, within the national territory and beyond; - Determination of the main directions of development and areas that need to be protected for the purposes of tourism, and definition of the infrastructure required for their development; - Through tourism re-organization, identification of areas with priority importance for tourism growth, and determination of the principles of building in this context; - In relation to tourist demand, mobilization of new areas with outstanding natural or man-made tourist values, representing at the same time guiding development factors, especially in underdeveloped areas; - Identification of possible collisions between tourism and other economic activities in certain areas, balancing of their mutual impacts and definition of priorities of development and facilities allocation; |

- Protection and re-valorization of areas suitable for tourism development, their planning in terms of tourism and urban development and integration of facilities in the natural or historical ambient, through full application of criteria and standards for the protection of environment, natural and cultural heritage;
- Through spatial organization of tourism, besides its basic economic function, stimulation of social health, cultural and educational functions, as well as promotion of conditions for daily, week-end and holiday recreation of the local population;
- While projecting accommodation facilities, the principle of complexity of offer should be observed, its territorial and time adjustment to the demand, as well as acquisition of greater economic effects through lower investments.

Planning determinants

On the basis of comprehensive analysis of existing natural and man-made conditions and resources, the following types of tourist resources may be distinguished by scale, quality, distribution or uniqueness, functionality, attractiveness and extent of attractiveness on the national territory: water resources, mountains, spas, areas and goods possessing natural and cultural heritage, tourist transit routes, urban settlements, hunting sites and villages. Considering the above resources and defined tourist sites therein, there are favourable conditions for development of the following types of tourism: bathing (lakes); mountain – winter sports; mountain – climate curative; spas; hunting; transit.

On the basis of the main long-term goals, concept and criteria for tourist offer development and organization, 10 tourist regions have been identified in the country, with 54 tourist zones, namely:

1. Skopje-Kumanovo with 8 zones
2. Sara-Polog with 4 zones
3. Kicevo-Brod with 2 zones,
4. Mavrovo-Debar with 4 zones
5. Ohrid- Prespa with 7 zones
6. Pelagonia with 8 zones
7. Middle Vardar with 6 zones
8. Strumica-Radovis with 4 zones
9. Bregalnica area with 8 zones and
10. Kratovo-Kriva Palanka region with 3 tourist zones.

Within these regions and zones, there are 200 tourist sites, among which 34 are defined for activities on snow, 47 for water related activities, 80 in natural and 106 historical surroundings, 9 – spas, 29 urban tourist resorts and 4 – main trans-border links.

Source: Spatial Plan of the Republic of Macedonia, June 2004

2- No cluster approach

This critical point is to some aspects a corollary side of the omission of the Spatial Plan of Macedonia. The action plan proposed in the Strategy does not provide an implementable overall Strategy but some isolated experiences of development, most of the time focused on certain spots, scattered over the territory of the country. Following this logic, it is almost impossible to identify strongly affirmed tourist products which could then unite and federate national and local actors in view of a fast and efficient product's implementation.

In a word, we can say that the Strategy is lacking a Cluster approach. In order to be relevant, this clustering methodology should fully grasp 2 axes:

- *a thematic axis*: the objectives of the Strategy's action plan in terms of tourism products and services do not refer to thematic products but indistinctly and separately to Macedonia's different types of resources, services and facilities: accommodation,

National Parks, wine tourism, handicrafts, spas, heritage attractions, conferences and meetings, monasteries. Basing the analysis on several Clusters of products to be implemented would have given a strong readability to the analysis.

- *a territorial axis*: the Strategy does not propose any territorialisation but a fragmental or inexistent geography. It comes through either a very selective and narrow territorial approach in proposed actions (Mother Teresa's House, Markovi Kuli, Brajcino, etc.) or a too general or non precised territorial framework ("Explore culture and handicrafts as tourist products", "Provide unusual actions in rural locations"). In both cases, these inadequate territorial approaches do not allow the possibility of testing pilot-projects with the view to be validated and replicated elsewhere in the country. They omit to take into consideration any involvement and collaboration between local and national actors in view of a fast and efficient implementation.

3- A preferential marketing approach

The National Tourism Development Strategy puts forwards priorities in marketing targets, by appointing:

- Western markets as priority markets (Austria, France, Germany, Greece, Italy, Netherlands, Switzerland, United Kingdom, USA);
- regional markets as secondary markets (Albania, Bulgaria, Croatia, Serbia, Montenegro, Slovenia, Turkey, Hungary);
- some others as opportunity markets (Australia and New Zealand, Bosnia and Herzegovina, Israel, Russia, Ukraine, Scandinavia).

Theoretically, such a marketing prioritization put forward in the Strategy is understandable and based on valid criteria. However, from an operational objective viewpoint, prioritizing markets without having an accurate view of their respective needs or therefore linking them to appropriate tourist products may be too exclusive and ineffective, and it can actually exclude some perspectives of development on other markets.

The Part 1 of this report delivered the following statements on Macedonia's clienteles:

- domestic tourism is still the most developed in Macedonia;
- in terms of volume of visitors and number of overnights spent, the regional market is still the most important foreign market in Macedonia;
- the National Tourism Development Strategy also show that in terms of per capita spending by foreign visitors, the Western European and American markets are the most significant.

Associated with specific and adapted tourist products, each of this market can represent a potential leverage for tourism development in Macedonia. By establishing a certain hierarchy or prioritization between them, the Strategy presents evident weaknesses:

- the domestic market, still the most important in terms of volume of visitors and number of spent overnights, is totally left aside in the Strategy. Even though it has already developed to a considerable extent, there are still continuous development opportunities in ensuring this market sustainability and increasing its volume. Its requirements and renewed expectations need to be taken into account. In the current regional competitive situation, the stake of preventing domestic tourists from going out of the country to spend their holiday time in neighbouring countries (Greece, Bulgaria, Albania..) has become of major strategic importance.

- pointing out the western international market as a priority would certainly lead to shaping tourist products adapted as a priority to this market, at the expenses of the regional and domestic markets, which may have not the same expectations.

4- No proposal regarding governance and institutional framework

The Strategy is also characterized by the absence of any significant appraisal of and proposal for a comprehensive institutional framework needed for the effective implementation of the strategy and of any pragmatic proposal for the implementation and the sustainability of such a framework: these weaknesses are observed both in the NTDS' analysis and its organization proposals, as briefly recapitulated below.

| Topic | Comments |
|---|---|
| Law on Establishment of Agency for Promotion and Support of Tourism and Ministry Organization | The actual dichotomy of the Agency for Promotion and Support of Tourism with the Tourism Department of the Ministry of Economy is not critically appraised by the NTDS in order to highlight evident overlapping in competencies and responsibilities, and, on this basis, propose a more sustainable set up, such as would allow for more complementarity and synergy between the two public bodies. |
| Municipalities in Tourism | The very short and confusing NTDS account of the Municipalities' role in tourism is not acceptable, given the overall institutional framework which assigns important functions to the local authorities, in particular as concerns tourism planning and development. One would have expected that the NTDS had reviewed all available tourism development plans and strategies prepared by the key tourism destination towns in the country. |
| Tourism and hotel associations | The NTDS provides a brief account of different associations – HOTAM, ECTM, ATAM, Skopje Tourism Association, but omits to conclude with a synthetic comparative account of their complementarities, overlaps or/and synergies. |
| Role of Regions in Tourism | In Macedonia there are 8 planning regions at NUTS 3 level with substantial disparities which represents a great challenge for the policy of the balanced regional development. Each of these planning regions has reportedly prepared its development plan, including the approach and strategy of the regional tourism development. The NTDS does not address at all this dimension. |
| Role of National Parks in Tourism | The question is the same for the potential role of National Parks in tourism development, organization of the local offer and coordination with tourism actors on a sub-national level. The existing three national parks and these that are reportedly being planned (such as the Sar Planina one), are certainly promised to take a significant role in this domain, a question which is not addressed at all by the NTDS. |

| | |
|--|--|
| <p>NTDS Conclusions regarding governance</p> | <p>Given the shortcomings highlighted above, the chapter 7.4 Conclusions does not deliver a needed synthesis such as would have very usefully supported the NTDS recommendations (Chapter 15), with the necessary focus on the reinforcement and consolidation of the overall institutional framework for tourism development and promotion.</p> <p>In particular, the final recommendation recommending the establishment of an Advisory Board for the Agency for Promotion and Support of Tourism is not bold enough since it does not consider the option of recommending the creation of a public – private partnership (PPP) for this Agency, combined with its much more complementary positioning with regard to the Tourism Department in the Ministry of Economy.</p> |
|--|--|

In conclusion of this brief review of NTDS' coverage of the institutional framework for tourism, if it is admitted that a sustainable development and promotion of tourism can only be ensured through a fruitful complementarity and synergy of all institutional, territorial and thematic or sectoral actors, then the NTDS has evidently failed to formulate any concrete proposals in that direction, for having omitted to:

- (i) deliver an appropriate appraisal of the different relevant stakeholders and their mutual inter-action and,
- (ii) (ii) to propose synergetic moves which would enable a joint tourism development action, involving all relevant stakeholders.

1.4 Shaping a Sustainable Strategic Vision for Tourism in Macedonia

Considering the lack of operational effectiveness and readability of the Strategy, Macedonia now needs to get the operational keys to become a renowned and valued tourist destination. Shaping and delivering a clear, strong and territorially well framed tourism product to promote at well defined markets scales will be the key-success to an operational achievement of its tourism development.

The current National Tourism Development Strategy 2009-2013, elaborated in 2008 with the technical support of the UNDP and NTWO has been partly implemented. Today, at the beginning of 2011, it seems rather unrealistic to draw a sustainable action plan within the remaining period 2nd half 2011- 2013. For that reason, this report on Revision and Implementation of the National Tourism Development Strategy is thought out and scheduled over the future period between 2011 and 2015.

At national level, 2011 must be the year of preparation to implementation time. It will be intensely dedicated to national and local political actors' consultations and cooperation within the preparation of actions' implementation. It must also be a time for consultation and involvement of local economic and tourist stakeholders, who must be the mainstay of the strategic re-defined action plan's operational implementation progress, results and evaluation. For that strategic reason, some of the proposed actions will also be implemented from 2011 at local levels (see *part 3: Tourist products and action plans*).

Macedonia should then build up a solid marketing strategy which strictly follows the following objectives:

Overall objective: developing a powerful brand image capitalizing on the connotations of the word "Macedonia"

Macedonia must have a clear idea of what it represents when identifying and developing its brand name. This goes through the answer to 2 main questions:

1- What does Macedonia represents to each of its different targeted markets?

Macedonia indeed needs to have a clear global image of what it represents. It must above all avoid a major failing: creating a picture which might be appealing to all, but not to anyone specific

2- What are Macedonia's comparative assets, which in particular distinguish the destination from its regional competitors?

In the report introduction is underlined the historic connotation of the name Macedonia in Europe, though without a clear vision of what Macedonia effectively represents today. We also mentioned the culinary meaning of the word Macedonia in Italy, Spain, France, and in some other parts of the world. Here appear two main images that Macedonia can put forward to this specific targeted market: history/culture and gastronomy. From this general image, different products could then be created and adapted to the different targeted markets. To reach this overall objective, the following marketing steps should be implemented:

1- Taking into account the 3 geographic markets and proposing differentiated products to their specific needs and expectations

Considering the diagnosis made on part I and in the critical lecture of the Strategy, Macedonia should equally take into consideration the 3 distinct geographic markets:

- International: Western Europe, North Eastern Europe and rest of the World;
- Regional: including (according the first classification made in part I table 9) the neighbouring countries (Albania, Serbia, Kosovo, Bulgaria, Greece), the 2 remaining former Yugoslav republic (Croatia, Slovenia) and a nearby Mediterranean country: Turkey
- Domestic, which still represents the majority of tourists in Macedonia

The point is then not to exclude some markets, nor to establish a division between primary, secondary and opportunity markets. It is about equally defining each of these markets characteristics, needs and expectations and proposing each of them an adapted and specific offer

2- Proposing differentiated territorial products matching targeted markets' needs

In order to deliver to the targeted markets, especially the regional and international ones, the needed legibility and readability of Macedonia's land and borders, the destination should think its tourism development strategy through the development of territorial tourism development poles. Those poles will then be the land of experiences of tourism development and promoted as such. Each of these poles should be associated with a tourism development topic and become the marketing leader of its respective tourism thematic issue. On this territorial basis should be built solid tourist products to be promoted towards the right targeted market (s) according to their specific expectations.

3- Betting on quality of facilities and services

Considering the regional competition in tourism, Macedonia cannot just build differentiated products which match the targeted markets: it must fix a transversal or cross-cutting guideline consisting in improving the quality of its tourism offers:

- facilities and infrastructure: accommodation facilities comfort, catering trade diversity , road infrastructure accessibility and practicability;
- services: hospitality in accommodation and catering trade facilities, information services, orientation and guiding assistance.

Quality also lies in showing and providing the tourists with authenticity. Authenticity is indeed inseparable from alternative forms of tourism. Those different factors are the ones that will make people come for the first time if they are promoted as such, but above all which make them stay... and come back.

4- Improving the seasonal pattern of tourism

Improving the seasonal pattern of tourism is a major source of tourism income increase. It is about extending the seasonal tourist attendance period beyond the narrow summertime (or wintertime in the case of ski resorts) periods, and increasing the length of stays. These must be

the major long-term final objectives of the tourist products' implementation through the transversal construction of a coherent and quality offer.

2. A RENEWED STRATEGIC FRAMEWORK FOR TOURISM DEVELOPMENT IN MACEDONIA

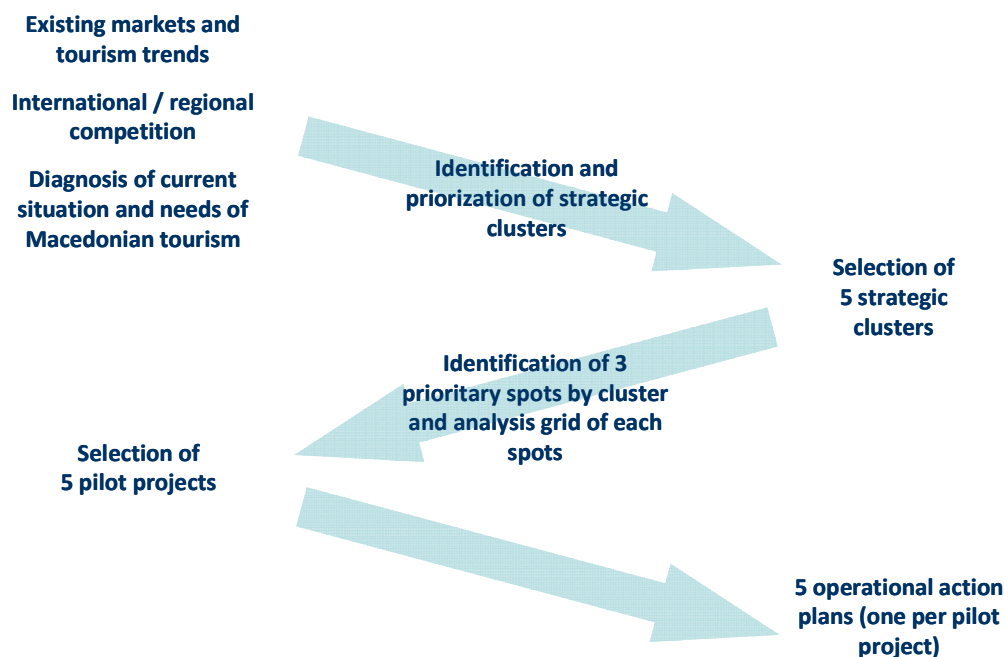
In accordance with the critical analysis of the National Tourism Strategy 2009-2013 presented in Part I.1.3, and following the marketing objectives retained in Part I.1.4, a new strategic framework for tourism development in Macedonia will be proposed. In tight consultation with the Ministry of Economy of Macedonia - Tourism Department and economic and tourist stakeholders, a territorial and thematic approach has been set up by going through the following steps:

- 5 thematic clusters according to the prior study of targets markets needs and Macedonia's comparative assets;
- 3 major geographic spots in each cluster, as potential implementation spots of thematic cluster development;
- 1 pilot project per cluster, among the 3 beforehand identified spots. This pilot-project spot will be the place of tourist product creation, according to its corresponding thematic cluster. Its experience will then be exported to the 2 other spots selected within the same cluster.

It will then establish a diagnosis of the current situation and development opportunities of each pilot project spot before proposing an operational action plans for each of them, in the following issues:

- 1- offer
- 2- governance
- 3- marketing
- 4- communication and promotion

Needed transversal (or cross-cutting) global actions will finally be detailed, as global guides to the implementation of this renewed territorial and thematic strategic framework for tourism development, as visualized in the chart below.



2.1 Adopting a thematic and territorial approach

2.1.1. Selection of 5 Strategic Clusters

In tight consultation with the Ministry of Economy - Tourism Department and the tourist and economic stakeholders, 5 thematic tourist clusters have been selected. The choice criteria have been based on:

- analysis of Macedonia's tourism resources
- definition of Macedonia's tourism comparative assets
- development potentials of each of the following cluster

These 5 selected clusters are the following (presented in arbitrary order):

Cluster 1: Lake tourism
Cluster 2: Wine tourism
Cluster 3: Cultural tourism
Cluster 4: Rural tourism
Cluster 5: Mountain tourism and nature activities

2.1.1.1. Clusters descriptive and analysis fiches

For each of the 5 clusters, an analysis of their potentialities and support resources is briefly presented in the tables below. An overview of their current state of development as well as development opportunities and objectives will be detailed.

Cluster 1

Title: LAKE TOURISM

DEVELOPMENT CONTEXT

Over the last decades, a tourism development emphasis had been placed on lake tourism. This can be substantiated from the level of constructed facilities and infrastructural attitude towards tourism development. The Ohrid Riviera has today the most important aura. The organization and development of tourism in this area should be an example for other regional lake entities in the Republic of Macedonia.

POTENTIALITIES- RESOURCES

Elements for a mass lake tourism

lake resource itself

beaches

water activities

warm weather in the Southern lake regions during summer months

existing infrastructures

CURRENT STATE OF DEVELOPMENT

Despite of this context and potentialities, lake tourism in the Republic of Macedonia is not entirely developed

- ✗ in the Republic of Macedonia encouraging and supporting of the concession activities at the shores of the lakes are not sufficient. Based on this, there occurs devastation and degradation of beaches and the littoral parts of the lakes such as the western part of Lake Prespa.
- ✗ swimming activities in the lake tourism are related with the clean water and the protected littoral, sub-littoral and coastal configuration. Such a characteristic has only the shores of Lake Ohrid, while the other lakes are not protected in this way.
- ✗ the lack of concessional determination is the cause of poor care in terms of hygienical - sanitary protection of the region. The coastlines in the Republic of Macedonia are generally taken care of by the local authorities, but local authorities cannot in the best way deal with the problems of regulation and management of the beaches.
- ✗ a specific characteristic of the Republic of Macedonia is that it possesses a significant amount of lake tourism offer within the lake tourism in the form of artificial and glacial lakes. However, very little care is put into the activation of these potentials. An exception is the Mavrovo Lake and fragmented forms in Kalimanci Lake, Tikvesh Lake and Berovo Lake. It is important to note that the glacial lakes are not in a function of tourism development.
- ✗ in the strategic documents and in the spatial plans it is not sufficiently elaborated the complementarities of the lakes that do not carry the main tourist offer. As an example can be cited the lack of complementarities in the relation Globochichko Lake - Ohrid Lake and some others;
- ✗ poor mapping and signalization of the resources in the lake tourism which leads to the need for an integrated tourist offer.

Some threats also should be better taken into consideration

- ✗ too large saturation of the beaches on the lake shores
- ✗ no adaptation of accommodation facilities to the requirements of the tourist clientele
- ✗ poor representation of selectivity in the tourism offer that would be based on the existing relationships
- ✗ too large increase of urbanization and solid structures in the coastal and littoral areas
- ✗ presence of tourism presentation without adequate knowledge of the lake value
- ✗ inadequate way of capacity renting in the domestic accommodation (eg Ohrid, where unauthorized persons rent rooms directly at the bus station)
- ✗ cross - border character of the lakes and the potential possibility to reinforce the tourists offer and development through cross-border cooperation;
- ✗ lack of equipment of the communication facilities to the tourist glacial lake sites
- ✗ poor constate or absence of ropeways, in order to access lakes in the mountain areas

DEVELOPMENT OPPORTUNITIES AND OBJECTIVES

- ✗ Macedonia has relatively wide branching lake shores that can be used for tourism purposes. It refers to the tectonic lakes that fall into the group of the oldest lakes in Europe.
- ✗ the variety of activities on the lakes in the Republic of Macedonia represent an unused opportunity, because despite the swimming options, there exist also insufficiently activated solutions for hiking, fishing, water sports, entertainment animation activities, manifestation activities, educational tours and so on.
- ✗ utilization of existing infrastructural and suprastructural facilities aimed at sustainable development without significant and special investment activities.
- ✗ utilization of already established organizational structures at the national level and local government and involvement of existing travel agencies in the creation and sale of the tourism offer

Cluster 2:

Title: WINE TOURISM

DEVELOPMENT CONTEXT

Wine tourism in the Republic of Macedonia represents a new category of development which occupies a special place in the strategic goals. The relatively new date of developmental opportunities is because the Republic of Macedonia was not able to perceive the importance of wine in the context of planting, cultivation, processing, consuming and use in activities of animation character that wine would have in a longer time interval. The current situation suggests that wine is linked with not only gastronomic qualities, economic benefits, but also with social competitiveness and, above all, presence of tangible and intangible cultural heritage.

POTENTIALITIES-RESOURCES

Wine is a brand of Macedonia in many aspects, because it has not only market character, but is part of the lifestyle in religious feasts, celebrations, and other living traditions that often have positive connotations. Macedonia belongs to the so-called "old vineyard countries", such as France, Italy or Spain.

CURRENT STATE OF DEVELOPMENT

- ✗ differentiation of the wineries is relatively with a more extensive character, so that only a few firms dominate
- ✗ no specific domestic exposure of wine tourism offer and heterogeneous branding of the wine products
- ✗ weak representation of manifestations in the function of the significance that wine has as a product of the Republic of Macedonia
- ✗ relatively small number of travel agencies that are designated for specialized promotion of existing wine offers
- ✗ reduction and weak stimulation of vineyards
- ✗ weak acceptance of the population for renting accommodation in the domestic housing
- ✗ low technological and technical structuring of the processing of wine

DEVELOPMENT PERSPECTIVES AND OBJECTIVES

- ✗ Government and local programs for supporting small family wineries
- ✗ creation of more organizational, governmental units for treatment of wine as food
- ✗ possibilities for linking the wine roads to existing attractive – motivational characteristics of the surrounding area
- ✗ improving staffing in the agro – tourism and tourism business activities
- ✗ creating special brands of wine products

Cluster 3:

Title: CULTURAL TOURISM

POTENTIALITIES- RESOURCES

Segment A – cultural heritage resources

- ✗ Macedonia – biblical land
- ✗ Macedonia – crossroad of cultures and civilizations
- ✗ Abundance of cultural heritage originating from all periods of human history (Neolithic, Early Antic – Bronze and Iron Age, Antic period – Greek and Roman, Late Antic – Early Christian, Medieval – Byzantine, Late Medieval – Ottoman, XIX Century Revival, XX Century – Modern)
- ✗ Good inventory of heritage resources – digital database in creation;
- ✗ Good state of preservation of the main cultural heritage artifacts;
- ✗ Clear vision of the Institutions for protection of the heritage connected with the tourism potentials of the cultural heritage
- ✗ Defined juridical framework about the categorization of the cultural heritage and the level of tolerated actions and adaptations in the process of conservation and revitalization

Segment B- tourists

- ✗ Image of living history
- ✗ Challenge to explore and participate into something unrevealed
- ✗ Country on current crossroads
- ✗ No-commodification of the cultural heritage resources;
- ✗ Several regions with significant cultural heritage have developed good tourist infrastructure (accommodation, services, transportation)
- ✗ Warm hospitality of the recipient community
- ✗ Segment C – state/local community
- ✗ Awareness of cultural tourism potentials
- ✗ Defined stakeholders in cultural tourism cluster (Ministry of Culture, Institute for protection of the cultural heritage, Religious organizations, Business sector, Professional associations, Local government)
- ✗ Existence of professional bodies at relevant stakeholders connected with cultural tourism
- ✗ State subventions for incoming tourists

CURRENT STATE OF DEVELOPMENT

Segment A – cultural heritage resources

- ✗ Insufficient research activities in cultural potentials of Macedonia
- ✗ Not existent list of the cultural heritage that have development potentials in cultural tourism
- ✗ No analysis of the current state of usage of the cultural heritage in tourism activities
- ✗ Misunderstanding that cultural heritage is automatically touristic resource
- ✗ Absence of cultural heritage management plans
- ✗ Existence of neglected monuments that have tourism potentials
- ✗ Weak development of Story Lines, Heritage Trails or other cultural tourism products;

Segment B – tourists

- ✗ Cultural tourism brand on national level is not established
- ✗ Faint image of the country on the international markets connected with cultural tourism potentials
- ✗ The great number of the tourist agencies are interested in outgoing instead in incoming tourism
- ✗ Weak tourist products based on cultural heritage
- ✗ Undeveloped standards for quality of cultural tourism products
- ✗ Deficiency of good guiding services in the most of the regions in the country;

Segment C – state/local community

- ✗ Insufficient communication between stakeholders
- ✗ Deficiency of qualified human resources in the most of the regions in the country
- ✗ Not established cultural tourism network
- ✗ Undeveloped techniques to collect data about visitors in cultural tourism (numbers, motivation for visit, level of satisfaction etc.)
- ✗ Segmented and divided stakeholders
- ✗ Some forms of cultural/religious tourism need to be treated very carefully, especially the tourism within active monastic communities because of the strong rules for visits and overnights in the monasteries
- ✗ Undefined NGO sector not capable to be involved into the cultural tourism cluster
- ✗ Lack of financial assets

THREATS

- ✗ Unstable accession process in the EU and NATO
- ✗ Lack of financial assets in the infrastructural projects
- ✗ Strong political division of the country that sometimes causes problems in communications on the national versus local government
- ✗ Disputes and unsolved issues with some of the neighboring countries.

DEVELOPMENT OPPORTUNITIES AND OBJECTIVES

Segment A – cultural heritage resources

- ✗ To develop coordinative research strategy;
- ✗ To develop relevant methodology connected to valorization of the cultural heritage for cultural tourism – possibilities and restrictions;
- ✗ To improve the presentation of the cultural heritage to the public;
- ✗ To facilitate the access and utilization of the existing database of the cultural heritage in Macedonia;
- ✗ To make management plans prerequisite for involvement of tourist activities into the protected buildings and sites;
- ✗ To ensure that our vision of cultural tourism reflects values and principles like authenticity, preservation, quality;
- ✗ To improve the preservation on the monuments that are neglected with the initiation of their cultural tourism potentials;

Segment B – tourists

- ✗ To make distinctive brand of the country based on cultural heritage resources;
- ✗ To develop strong and innovative cultural tourism products;
- ✗ To create materials that are supporting the brand and created cultural tourism products;
- ✗ To carry out advertising, publicity and media plans for the brand and cultural tourism products;
- ✗ To have systems in place to measure the effectiveness of the plans and the quality criteria fulfillment

Segment C – state/local community

- ✗ To ensure that cultural resources will be a tool for sustainable development on national/local level;
- ✗ To establish a network of the stakeholders in the cluster of cultural tourism;
- ✗ To improve the communication between stakeholders;
- ✗ To appoint national/local leaders who will be ambassadors and advocates about the benefits of cultural tourism;
- ✗ To appoint national/local leaders who will act as decision-makers in cultural tourism;
- ✗ To educate the local communities about the essence of the cultural tourism;
- ✗ To share collected information about the visitors (numbers, motivation for visit, level of satisfaction etc.);
- ✗ To ensure stable financial funding of the projects;
- ✗ To put evaluation systems in place to measure the cultural tourism impact at all stakeholders and in the local community

Cluster 4

Title: RURAL TOURISM

DEVELOPMENT CONTEXT

Rural tourism takes part in all major national documents – Spatial Plan; the Strategy for Sustainable Development in Macedonia and in the regional plans for Ohrid / Prespa Region and Skopje region. Macedonia, as a candidate country for membership to the EU, benefits from the new Instrument for Pre-Accession Assistance (IPA), one of the components of which covers the co-financing of rural development-related matters (IPARD) in the period 2007-2013. The IPARD Programme includes measures aimed at funding diversification of rural activities, mainly centred on the development of rural tourism, viewed as a key initiative for ameliorating life conditions in the countryside, and at the same time able to provide interesting sources of additional income to rural residents

The World Bank Project “Community and Development and Culture Project” (2002-2006) started with the first activities related to the development of rural tourism in Macedonia. Namely the first rural spots where certain tourism development activities were financed were Vevcani, Ljubojno, Pehcevo, Berovo as well as in the Reka Region. A wide range of activities were financed starting from accommodation and catering capacities (renewal of old traditional houses), trails, cultural traditional events, souvenir shops, handicraft products etc. That resulted with good development of rural tourism in Vevcani – including accommodation, catering, organized trails and attractions, satisfying level that should be more developed in Berovo and Pehcevo, and basic level in the Reka Region.

The Reka Region includes more settlements; however the CDCP financed activities in Mavrovo, Duf, Bituse, Galicnik, Rostuse, and Lazaropole. A museum of Galicnik was opened in an old traditional house in the center of the village showing the history of this well known Macedonian village. Moreover the traditional Galicnik wedding was supported with traditional folk dresses and instruments, while certain promotion material was published. In Mavrovo and Duf a marking of the natural spots around the Mavrovo Lake and in the mountains took place as well as creating of trails. Several big billboards were displayed showing the potential of the Reka region. The handicrafts association in Bituse and Lazaropole got new razboi, Macedonian and international experts helped them define new design for their products that were afterwards exhibited and sold at the forthcoming Christmas Bazaars in Skopje. Rostuse got a new exhibition place within the old House of Culture.

The Traditional annual event for Sheep Raisers was financially supported as well as the summer competition of Macedonian pies that resulted with more visitors. The Saint Jovan Bigorski Monastery, one of the most important cultural heritages in Macedonia, located in the surroundings of Rostuse, near the municipality of Debar got new guest mansion and the interior of that building was financed by CDCP. All this activities were based on the proposals from the local people, who were also actively involved in the selection process in order to become active participants in the development, implementation and final result of the sub-project, to have the idea of ownership and finally the sub projects to become sustainable.

Those were some of the activities financed in the four year project period that initiated enlarged number of local visitors. Nowadays one can book a tour or reserve accommodation in Vevcani and Brajcino through the national tourism portal Exploring Macedonia. Some other sites such as Travel2Macedonia promote the rural tourism on their web- page. At my knowledge are two tour operators from Skopje that organize trips to Vevcani, upon request, like few days company retreats.

POTENTIALITIES-RESOURCES

- ✗ Traditional villages and unpolluted areas
- ✗ Rich natural heritage
- ✗ Hospitality of the inhabitants
- ✗ Sufficient number of protected natural areas- mountain and water natural resources
- ✗ Traditional agriculture and handicraft products
- ✗ High quality of natural attractions (lakes, mountains etc)

- ✗ Geographical diversity of culture, traditions, events, rural landmarks
- ✗ Increased interest from foreign investors
- ✗ Positive experience from the pilot projects for revitalization of old villages (mostly in south and east Macedonia)
- ✗ Low range of inhabitants in most part of the rural are as a solid base for recreation in the rural areas
- ✗ Rich archeological heritage (archaeological and architectural remains)
- ✗ Sufficient presence of protected areas
- ✗ Authentic / traditional agricultural and handcraft products
- ✗ Geographic diversity of culture, habits, traditional happenings, rural landscape
- ✗ Good prices of the rural goods and catering (food /beverages) - good VFM

CURRENT STATE OF DEVELOPMENT

Rural tourism in the Republic of Macedonia has fragmented features and in classical sense is still undeveloped.

Weaknesses

- ✗ Not good infrastructure in some rural parts of the country (roads, water)
- ✗ Not adequate treatment of protection in natural and cultural heritage
- ✗ Aside from the natural beauty there is not enough content – nothing for the visitors to do
- ✗ Lack of financial resources for investment
- ✗ Non existing standards for accommodation /services in rural areas
- ✗ Lack of vision amongst the national / local interest groups
- ✗ Lack of professional and trained human resources
- ✗ Lack of strategy /coordination for tourism and rural tourism
- ✗ Low offer of rural tourism in the overall tourism offer in the country and non existence of basic capacities
- ✗ The traditional handcrafts usually are not well organized or promoted
- ✗ Lack of marketing tools /sales and branding of high quality and typical rural products
- ✗ Very limited quantity of organic products. Here I would like to emphasize that the government has just introduced a seal for organic products which might help the rural tourism in indirect way
- ✗ Lack of appropriate studies /classification of rural surroundings

Threats

- ✗ Increased pressure on the environment (pollution of the water, new houses next to the traditional ones, etc.)
- ✗ Dominant development of products from the mass tourism
- ✗ Lack of active approach and dependence of donations
- ✗ Need to depend on and control the local participants
- ✗ Difficulties into finding sustainable ways
- ✗ Lack of intermediates on regional level that can influence cooperation
- ✗ Inbuilt image for the country as one perceived as a touristic destination
- ✗ Competition from the neighboring countries (Bulgaria, Greece)
- ✗ The long time necessary to build a “critical mass”
- ✗ Disbelief - Devaluation of the rural tourism as income and job generator

However, the situation is developing in certain areas very fast.

Constraints to development

- ✗ lack of standard differentiation of this type of tourism in all regional units
- ✗ not registered households which would deal with the rural tourism development
- ✗ within a context of uncategorization and unsystematization of space and accommodation requirements. There is no categorization for accommodation of this kind
- ✗ no signaling network and Internet communication within rural tourism
- ✗ low interest and no willingness of travel agencies to include this type of tourism in the tourism offer
- ✗ marketing activities of this type of tourism exists, but are not the result of developmental characteristics that represent the present situation

- ✗ The population in Macedonia is not sufficiently informed of the importance that rural tourism as a special market and development tourism category
- ✗ There is a mismatch between some local approaches in this field with the level of commitment that the central government has
- ✗ Low usage of traditional values in agriculture, the number and diversity of livestock and their incorporation within the tourism offer
- ✗ The population is not sufficiently informed about the investment opportunities in the sense that certain funds and donations can be provided
- ✗ Communication to the rural areas in terms of public transport and road condition is relatively weak
- ✗ There is no separate organizational structure that specifically deal with rural tourism

DEVELOPMENT OPPORTUNITIES AND OBJECTIVES

- ✗ Development of destinations for rural tourism and creating products for it
- ✗ Rural tourism as a mean for branding the local, organic and traditional products
- ✗ Diversification of the touristic sector in the country as well as repositioning of the touristic offer
- ✗ Creating new jobs in the rural area
- ✗ General trend for increased demand of products in the rural tourism once it has been promoted
- ✗ Development of entrepreneurship in the rural surroundings
- ✗ Improvement of the organizational structures for the products of the rural tourism and their marketing
- ✗ Opening possibilities for new investments of the activities for rural tourism development
- ✗ Developing of "touristic character" for the key villages with traditional houses or traditional events
- ✗ Using unique ways of communication
- ✗ Cross border cooperation
- ✗ Improvement in the catastar
- ✗ Promoting RT as part of the well - being (for example through hiking)
- ✗ Opportunities for farmers to participate

Note:

Support for rural development and agri-environment measures is often defended on the basis of the contribution of farming to the attractiveness of rural areas and the growing rural tourism sector. Farmers may benefit from the presence of tourism by offering accommodation or selling farm products to tourists. The farming practices influence the attractiveness of an area for tourism and have an impact on the prices that can be charged for accommodation. Amenities from agriculture such as permanent grassland have a positive influence on rental prices. However, the presence of intensive agricultural and livestock farming and associated polluting activities decrease the attractiveness of rural regions for tourism. Farm tourism is found to make an important contribution to the farm income and economy of a rural region. Overall, there are major synergies between farming and rural tourism. Strengthening this relationship may therefore be a good strategy for countryside management and rural development. Even more, this might help enhance the overall image of farming in Macedonia.

Strategic goals

- ✗ Structuring the current / future initiatives for RT
- ✗ Creating critical mass for the activities of the RT
- ✗ Creating a general image for all of the RT
- ✗ Planning sustainability for the RT from social, economical and ecological aspects

Operational goals

- ✗ Creating a national guide, fair, web page and management board
- ✗ Centralized system for booking in the starting years
- ✗ Creating regional points for coordination
- ✗ Organizing short but intensive training for RT activities
- ✗ Organizing additional trainings for financing from IPARD

Marketing development axis

- ✖ logo and slogan development for all companies for rural tourism in Macedonia as well as a brand book
- ✖ developing a common national picture for promotion of the rural tourism and national system for booking
- ✖ Branding high quality agricultural products (wine, cheese, honey...)
- ✖ creating a good communication material and distribution
- ✖ creating activities and promoting them in attractive ways
- ✖ Some research shows that the quality of the *tourism* experience is significantly and positively affected by the income, the source from which information about the trip is retrieved (Internet, newspapers as well as general press and special travel press) and by the amount of information sought by the consumer prior to the trip. In turn, the quality of the *tourism* experience is the major endogenous factor that positively influences expenditures for *rural tourism*. Therefore, communication should focus on these

Cluster 5

Title: MOUNTAIN TOURISM

POTENTIALITIES-RESOURCES

Mountain tourism in the Republic of Macedonia has excellent prospects for the country because it is a hilly - mountainous country with dislocated space with features of mountain landscapes, mixed with valleys and gorges. Therefore the Republic of Macedonia can develop all mountain relief configurations higher than 1700 meters.

In the mountain tourism in the Republic of Macedonia are differentiated centers, such as Popova Sapka, Mavrovo, Pelister, Krusevo and rudimentary forms of ski - mountain activities at Ponikva, Golak, Vishni and Galicica.

CURRENT STATE OF DEVELOPMENT AND WEAKNESSES

The conditions indicate that mountain tourism is only developed in a certain part of the mountains, and that the potentials are not sufficiently used. Tourist valorization has not been done, nor the opportunities that the mountains have. Differentiation of the mountain entities has sound fundamentals and traditional features, but only one center (Kozuf) has made a step forward to engage the tourism offer in the Republic of Macedonia. Therefore, the choice of mountain tourism as a cluster form indicates that practically can be used the resources of a center in a broader sense.

- ✗ Lack of infrastructural equipment and arranging of tourist sites and facilities
- ✗ Poor tourism - marketing components in the marketing of tourism offer.
- ✗ Low staffing given the seasonal characteristics of the region (the population does not have enough expertise and professional qualifications for engaging mountain tourism activities)
- ✗ Lack of maintaining the existing communication links
- ✗ Partial privatization and inappropriate executed acceptance of market relations in the mountain winter - sports tourism activities
- ✗ Weak signalization and mapping of tourism resources and facilities
- ✗ Development of mountain tourism is linked to problems in the following areas:
- ✗ Insufficient existence of infrastructural, electrical, water supply and drainage capacities for adequate utilization of the opportunities for tourism development.
- ✗ Occurrence of illegal buildings and usurpation of state property (example of Jablanica at the Macedonian - Albanian border)
- ✗ Low level of acceptance of the domestic accommodation, because the traditional relationships are difficult to be disrupted in the mountainous area
- ✗ Low mediating activities

DEVELOPMENT OPPORTUNITIES AND OBJECTIVES

- ✗ Practical use of the acceptance for development of mountain tourism by social structures in the region
- ✗ Existence of natural assumptions for development of mountain tourism
- ✗ Opportunity for alternative forms of tourism
- ✗ Close connection of accommodation facilities for other purposes (lake tourism, etc.) in the mountain - tourist activities. This allows the rational use of accommodation facilities in two-seasonal activities
- ✗ Existence of human potential in terms of capacity utilization

2.1.1.2. Brief analysis of clusters marketing at national level

Among the few Macedonian travel agencies with incoming activities, a panel of 4 pilot travel agencies has been selected. The analysis of their offer will enable to measure the importance of each cluster in Macedonia's tourism current marketing offer.

- **Vis Poj travel agency, Ohrid**

Created in 2002, this travel agency focused on working only in incoming tourism. It proposes 3 categories of excursions in Macedonia:

- ✗ **Daily tours**
 - "St Naum, a magical linking of nature, the church and history", "Bitola, the city of the consul and the well-known Heraclea Lynchaestis", "Ohrid, city of the centuries, inheritor of the bright Lychnida"
 - St Jovan Bigorski, unique monastery complex surrounded with natural beauties"
 - The light of Ohrid, the shining city
 - Vevcani, Macedonian typical villages, natural beauties and rural architecture
 - Land of lakes (Ohrid and Prespa only)
- ✗ **Classical tours (3,5-day tours)**
 - Macedonia, the land of nature (programme not communicated)
 - Macedonia, the cradle of culture: City of Struga- Monastery of the Holy Mother in Kalista, Monastery of St Jovan Bigorski, Mavrovo. Accommodation at Bistra Hotel. Winter resort Krusevo, Bitola and its archaeological site Heraclea Lyncaestis, archaeological site Stobi. Accommodation in Skopje. Cultural and historical sites of Skopje,
- ✗ **Exclusive programmes to discover Ohrid archaeological localities and excavations**

- **Savana Travel Agency, Skopje**

It sells programmes relatives to 2-3 night city breaks in Skopje or Ohrid, 4 to 7 nights programmes in Macedonia, and regional Balkan programmes with 2 or 3 nights in Macedonia. Some of these programs included in the offer the opportunity to visit a winery in the region of Tikves (Demir, Negotino and Kavadarci) with wine tasting.

- **Turist travel agency**

Mostly incoming-oriented, this agency has the greatest success on the field of the rural tourism. It offers programs for 5 to 7 days stays and on the itineraries that include overnights in Skopje, Bitola, Ohrid, but also visits to Kavadarci, Struga, Mavrovo and Tetovo. Most of the activities regarding rural tourism are held during the summer, but can be rganized out of that period under request of interested guests. Ohrid countryside is the Most practiced rural tourism destination in this agency's offer.

- **Aurora tours**

This travel agency specializes in cultural tourism and offers Biblical religious tours, archaeology tours, cultural and sightseeing tours, adventure travel, as well as regular leisure group tours.

This brief overview shows that cultural tourism seems the most marketed cluster by the incoming travel agencies in Macedonia. Wine tourism is proposed in only one of the selected travel agencies and limits itself to brief a visit of its winery. Even though few agencies offer village tours in Macedonia, the selected agencies show promising attempts to develop this form of tourism. One observes a very little presence of mountain tourism and nature activities in this panel, which only seems to be crossed through when going to the monasteries or proposing adventure tourism tours.

2.1.2. Clusters' Marketing Targeting

Tourism marketing for strategic development purposes is about linking different markets to different tourist products. There is first a need of identifying markets' needs and assigning the tourist products which are matching their expectations.

Our belief is that all tourist products do not necessarily match all targeted markets. Targeted markets indeed have their specific needs and expectations, and then will not be attracted to products which do not suit their own expectations. More specifically, we must be aware and accept that Western European market will not be attracted by all tourist products. **The selection must indeed be made at tourist product levels before making any targeted market prioritization in the absolute.** This will also have an impact on the promotion tools' contents which will be addressed to each market

As previously underlined, we will consider with equal consideration 3 targeted markets:

- domestic/national market
- international regional market
- international western European/ EU market

Regarding the 5 selected clusters described below, and after assessing the 3 targeted markets' specific needs and expectations, the chart below exposes the marketing cluster strategy we propose:

| Markets | Domestic | International- Regional | International- Western Europe |
|--|----------|----------------------------|----------------------------------|
| Clusters | | | |
| Lake tourism | +++ | + | |
| Wine tourism | + | + | +++ |
| Cultural tourism | ++ | + | +++ |
| Rural tourism | ++ | ++ | ++ |
| Mountain tourism and nature activities | ++ | + | |

According to each market expectations, for each cluster a targeted markets prioritization has been elaborated:

- domestic markets are eager to take advantage of all their countries' resources and opportunities. The diversity of Macedonian tourist products is more propitious to increase and further develop domestic tourism. Among all clusters, lake tourism is probably the one which makes them stay in Macedonia for tourism purposes. Wine tourism may be less attractive, since considered as part of everyday life;
- international regional market can equally be impacted with renewed and identically strong tourist products of Macedonia. Being the most identity-related one, rural tourism must impact them on a higher degree, for its customs sharing and inhabitants meeting aspects;
- international western European market's expectations are obviously more focused. Their criteria of choice will prioritise discovery and pleasure, respectively embodied by cultural tourism and wine tourism. A strong desire of authenticity and cultures discovering must attract some segments of this market to rural tourism. Even though lake tourism and mountain tourism can be secondary choice criteria in visiting Macedonia, they will not be key-factors, those natural assets being found in closer western European countries.

The choice of this western European/ EU market requires some precisions. Considering the rather developed attendance number of the European market (see part I), we chose to restrict this market to Western European/ EU perimeter. Even though less present in Macedonia, but with a higher spending per capita, non European-world market (USA, Canada, Australia, Japan) is however worth considering, but we consider it must not be privileged as a targeted market in the period 2011-2015: their needs and tourism sensibility can nevertheless be seen as similar to the western European market, but much more intensely centred on 2 clusters: cultural tourism and wine tourism- gastronomy.

2.1.3. Selection of 5 Pilot Spots

Within each cluster, 3 different spots have been selected, in tight consultation with the Ministry of Economy of Macedonia - Tourism Department and economic and tourist stakeholders. The criteria of selection lie in their potentials in terms of the concerned cluster resource and of development perspectives. With the consultation and approval of the Ministry of Economy-Tourism department and the tourist stakeholders, one pilot spot had been selected among the 3 pre-selected spots, within each cluster.

The final selection criteria have been the following:

- general tourism level of development
- image and renown of spot's name at an international level
- image and renown of spot's name at a regional level
- tourist resources and potentials in cluster's issue
- involvement and reactivity of local actors and stakeholders
- accessibility

The aim of pilot spots selection is intentionally selective at a territorial level. It does not mean to create privileged areas, but to capitalize on them in order to further develop best practices

all over the territory. The chart below displays the selection method of the 5 selected pilot spots:

| | | CHOICE CRITERIA | | | | | | TOTAL | Territorial balance all over Macedonia |
|----------|----------------------|--------------------------------------|--|---|---|---|---------------|-------|--|
| | | General tourism state of development | Image and renown at international level (regarding the specific theme) | Image and fame at regional (neighbouring) level | Tourist resources and potentials regarding the cluster's specific theme | Involvement and reactivity of local actors and stakeholders | Accessibility | SCORE | Insertion in statistical regions |
| LAKE | Dojran | ✓✓✓ | ☒ | ✓✓✓ | ✓✓✓ | ✓✓✓ | ✓✓✓ | 15 | Southeastern |
| | Ohrid | ✓✓✓ | ✓ | ✓✓✓ | ✓✓✓ | ✓✓ | ✓✓ | 14 | Southwestern |
| | Prespa | ✓ | ✓ | ✓✓ | ✓✓✓ | ✓ | ✓ | 9 | Pelagonia |
| WINE | Ohrid region | ✓ | ☒ | ✓ | ✓ | ✓ | ✓✓ | 6 | Southwestern |
| | Stip region | weak | ☒ | ☒ | ✓ | ✓ | ✓ | 3 | Eastern |
| | Tikves region | weak | ☒ | ✓✓ | ✓✓✓ | ✓✓✓ | ✓✓✓ | 11 | Vardar |
| CULTURAL | Ohrid | ✓✓✓ | ✓✓ | ✓✓✓ | ✓✓✓ | ✓✓✓ | ✓✓ | 16 | Southwestern |
| | Prilep | ✓ | ☒ | ✓ | ✓✓ | ✓✓ | ✓ | 7 | Pelagonia |
| | Skopje | ✓✓✓ | ✓✓✓ | ✓✓ | ✓ | ✓✓ | ✓✓✓ | 14 | Skopje |
| RURAL | Berovo region | ☒ | ☒ | ☒ | ✓✓ | ✓✓ | ✓ | 5 | Eastern |
| | Reka region/ Mavrovo | ✓ | ☒ | ✓ | ✓✓ | ✓✓✓ | ✓✓ | 9 | border between Polog and Southwestern |
| | Vevcani region | ☒ | ☒ | ☒ | ✓✓ | ✓ | ✓ | 4 | Southwestern |
| MOUNTAIN | Mavrovo | ✓✓ | ☒ | ✓✓ | ✓✓✓ | ✓✓ | ✓✓ | 11 | border between Polog and Southwestern |
| | Pelister | ✓ | ☒ | ✓ | ✓ | ✓ | ✓ | 5 | Pelagonia |
| | Sar Planina | ✓✓ | ☒ | ✓✓✓ | ✓✓✓ | ✓✓✓ | ✓✓✓ | 14 | Polog |

According to those criteria analysis, the 5 selected spots are the following:

Dojran: Lake tourism
Tikves region: Wine tourism
Ohrid: Cultural tourism
Reka region: Rural tourism
Sar Planina region: Mountain tourism and nature activities

The analysis perimeter of these pilot spots will be practical and precised before each of the pilot spot's specific analyses.

A special attention was paid in considering this territorial “spotting” approach in the regional division of Macedonia into 8 statistical regions: the 5 chosen pilot spots are located mainly on an arc of a circle from Northeast to Southeast, thus covering the 4 following statistical regions:

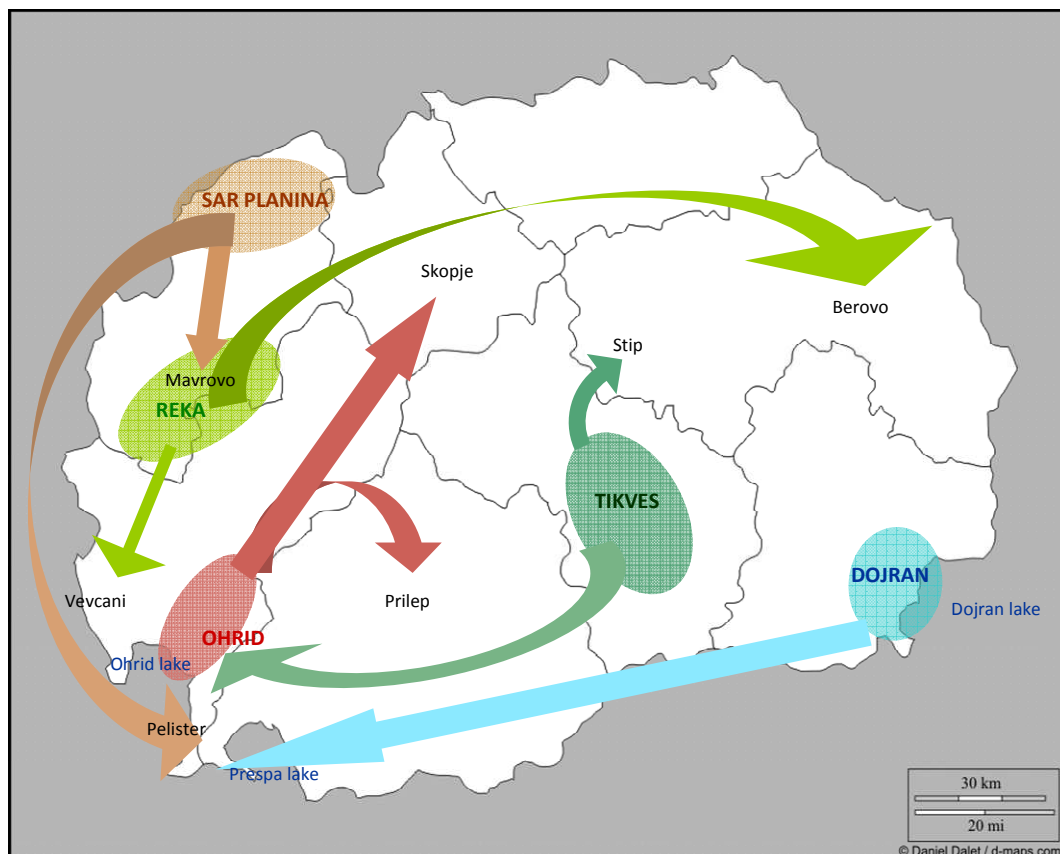
- Polog
- Southwestern
- Vardar
- Southeastern

If we now take in consideration the Spatial Plan of Macedonia of 2004, the pilot projects’ geographic locations cover 4 out of the 10 tourist regions defined in this Plan:

- Sara Polog
- Mavrovo-Debar
- Ohrid-Prespa
- Middle Vardar

The pilot spots have been chosen according to the list of criteria exposed in the chart above, which could not ensure a perfect territorial balance. However, the 15 long-list spots (3 per cluster) ensure a more balanced territorial coverage of the country, covering 7 of his statistical regions.

The territorial mid and long-term objective of this territorial approach is to spread the tourist products which will be built and tested in pilot-projects spots to the other spots which have been identified for each cluster. The map below shows the mid and long term expected territorial experiences spreading of the adopted territorial strategy.



2.2. Analysis of Pilot Projects

2.2.1. Lake Tourism - Dojran



The Municipality of Dojran is located in the Southeastern region of Macedonia, on the western shore of Dojran lake, at the very Greek border. Dojran lake spread across Macedonia (2/3) and Greece (1/3). It is surrounded by Belasica Moutnain (1883 m above sea level) in the north and by hilly medium-high massifs in the eastern and western sides: Krusha Mountain (860 m above sea level) in the east (Greece), and Karabaliya Moutain (697 m above sea level) in the west.

The Municipality has an area of 132 km² and includes 13 administrative rural units. It holds its particularity from its main division between the Old Settlement of Stari Dojran (Old Dojran) destroyed by bombings in 1916, which is the main tourist area, and Novi Dojran (New Dojran) constructed from 1918, today being the largest municipality town along the coast and a main fishing area.

The perimeter of study of this pilot-spot for lake tourism will be the legal borders of the Municipality of Dojran, for its strategic and exclusive position along the western shore of the Dojran Lake.

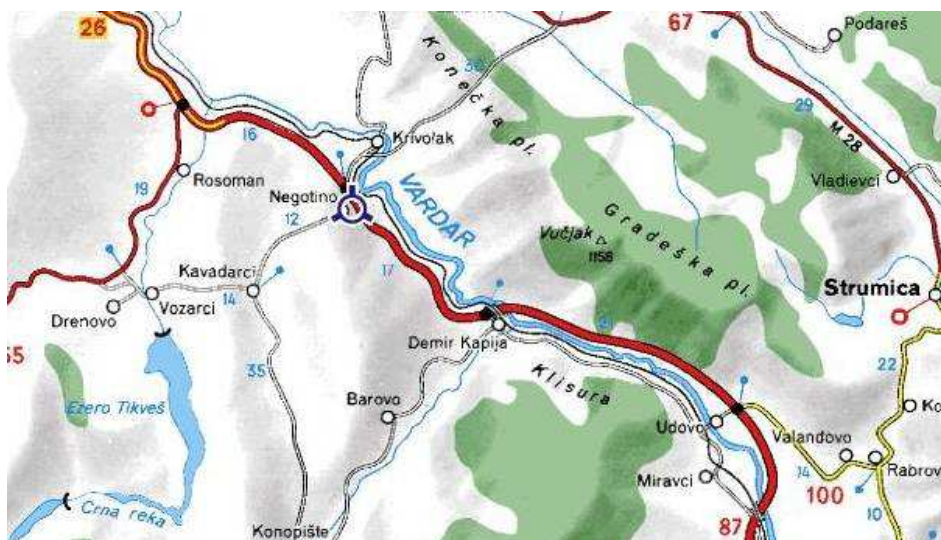
The descriptive and quantitative grid of Dojran Lake pilot site is given in Appendix I to this Report.

ANALYSIS OF PILOT PROJECT'S POTENTIALS – LAKE DOJRAN

| | |
|--|---|
| <p style="text-align: center;">STRENGTHS</p> <ul style="list-style-type: none"> • Presence of the lake with a beautiful scenery on medium high mountains • Existence of a General Urban Plan for New and Old Dojran (2000) and detailed urban plans (DUP) being developed for priority urbanization locations. Existence of urban documentation for other municipality's settlements • Well-preserved lake shoreline • Important number of beaches: 15 • Thermal sources in New Dojran • Healing characteristics of the water • Still existing accommodation facilities from the Dojran tourism golden age (1980's) • Important capacity of camping areas • Existing restaurants of all types (traditional, pizza, fast food) <p>Cultural and historical monuments</p> | <p style="text-align: center;">WEAKNESSES</p> <ul style="list-style-type: none"> • Weak capacity of hotels (less than 1 000 beds in all) • Low utilization of the accommodation facilities • Ineffectiveness of the casino activities • No global tourist offer proposed • Old water supply system in New and Old Dojran (dating back from 1958) |
| <p style="text-align: center;">OPPORTUNITIES</p> <ul style="list-style-type: none"> • Closeness of the Greek border and economic and human opportunities offered by the border crossing • On the diagonal path marked by the E_75 international European highway • Lands located at the lake shoreline • Dynamism in cross border and regional projects (with Bulgaria, Greece..) • Dynamism of municipality on urban development for tourism purposed on the lake 9 km-shoreline. | <p style="text-align: center;">THREATS</p> <p><i>Urban planning</i></p> <ul style="list-style-type: none"> - transit road with trucks and heavy motor vehicles slows the car flows trough the town: negative impact on environment and human health - poor urban structuralism and unurbanized settlements and illegal buildings on the entire area of the municipality <p><i>Lake water and water management</i></p> <ul style="list-style-type: none"> - spectrum of the ecological crisis in 1988: lake's water level decreasing loss. Unregulated status of the lake's water use between the republic of Macedonia and Greece. - insufficient protection of the lake and uncontrolled fishing and fish stock deterioration - Lack of regulation of the coast and the presence of agents of pollution Dojran and more generally lack of persistence in the |

| | |
|--|--|
| | <p>monitoring of the environmental conditions</p> <ul style="list-style-type: none"> - economic inviability of water supply and wastewater collection system |
| | <p><i>Accommodation and staff</i></p> <ul style="list-style-type: none"> - unavailability of most camping areas for works reasons - many closed tourist facilities with unsettled status (hotel-casino Atlantic, workers' rest houses) - lack of educational upgrading of existing staff involved in the Dojran region tourism |
| | <p><i>Governance</i></p> <ul style="list-style-type: none"> - restrained efforts of local institutional and economic actors due to the absence of a tighter coordination and cooperation between the central and local authorities, couples with an insufficiently empowered role of the civil society actors - not organized data collection and interpretation system - lack in private accommodation registration, which still represents the most used way of accommodation |
| | <p><i>Promotion and marketing</i></p> <ul style="list-style-type: none"> - low promotional activities at national level (especially media), which does not provide any visibility in the tourism market - insufficient means allocated to local tourism promotion and information, - Inadequate connection of the region in mediating sense - Weak involvement of travel agencies in the creation of tourism package tours |

2.2.2 Wine tourism/ Tikves region



Tikves region is a large fertile plain of around 2,135.73 km² located in Southeastern Macedonia, in the heart of the vine growing region of Povardarie. It is well known for its unique wine production which has historically been produced for 2,500 years. It is by far the first vine growing and wine producing region in Macedonia.

Sheltered by hills at an average of 300 meters above sea-level, it is crossed from West to East by the Vardar River, cutting the valley into western and eastern sections, which both have different characteristics:

- Eastern section: arid and sparsely populated
- Western section: fertile and more densely populated, rich in forests, minerals and pastureland.

The perimeter of study of this pilot-spot will focus on the western section of Tikves region, delimited by 4 municipalities: Kavadarci, Negotino, Demir Kapija and Rosoman.

The quantitative and descriptive grid for Wine Tourism Pilot Theme is given in the Appendix 1 to this Report.

ANALYSIS OF PILOT PROJECT'S POTENTIALS – WINE TOURISM – TIKVES REGION

| STRENGTHS | WEAKNESSES |
|---|---|
| <p>Identity</p> <ul style="list-style-type: none"> - region with a strong specialization and economic identity: wine growing and producing - by far first region in Macedonia for wine making and wine producing - Region with an history associated with wine tourism (Prince of Serbia in Villa Maria...) <p>Location and accessibility</p> <ul style="list-style-type: none"> - easy accessibility: location on the E-75 international-European highway <p>Presence of cultural heritage spots</p> <ul style="list-style-type: none"> - religious facilities associated with wine celebrations - existence of several wineries (Villa Maria, Chetorovi, Tikves, Povardarie etc.) with ancient production - proximity of Stobi archaeological site - | <p>Accommodation facilities</p> <ul style="list-style-type: none"> - few accommodation spaces in wineries (only 1 + 1 in project) with few capacities (from 7 to 12 rooms) - few accommodation capacities - inoperative categorization and standardization of facilities for consumption of wine and for accommodation <p>Wine facilities:</p> <ul style="list-style-type: none"> - too minimal amenities for wineries visiting and visitors' reception - wineries dissociated from vineyards <p>Wine industry:</p> <ul style="list-style-type: none"> - inconsistency in the purchasing prices and marketing of grapes as raw material for wine production - reduction of vineyard lands <p>Tourism and marketing offer:</p> <ul style="list-style-type: none"> - no visible wine identity in urban areas - little developed interpretation facilities on wine history and current activities - lack of spatialization through the region (no roadsigning nor signposting) - any created wine itineraries/ routes - no linked established between wine and gastronomy in its broader sense - no Tourist Info Centre in region |

| OPPORTUNITIES | THREATS |
|--|--|
| <p>Tikves wine road foundation</p> <ul style="list-style-type: none"> - existence and dynamism of the Tikves Wine Road Foundation, involved in regular international cooperation programs <p>Innovative initiatives supported by private actors</p> <ul style="list-style-type: none"> - innovative initiatives carried out by young entrepreneurs or private wineries (Bovin) for the creation of accommodation spaces in their wineries (Popova Kula, Bovin) | <p>Local population interest and involvement</p> <ul style="list-style-type: none"> - weak acceptance of the domestic population for the accommodation of tourists - lack of education of the population and the providers of services about the importance of wine tourism for the tourism offer <p>Promotion, marketing offer</p> <ul style="list-style-type: none"> - lack of promotional activity in this regard - no proposed tourist packages and very little development insertion in travel agencies offer <p>Financing</p> <ul style="list-style-type: none"> - Absence of subsidies and benefits on local and state level <p>Governance:</p> <ul style="list-style-type: none"> - little developed direct political cooperations between the different municipalities of the region to work on the harmonization and creation of a common tourist offer - no centralized organization of regional offer marketing |

2.2.3 Cultural Tourism/ Ohrid



Built between the 7th and 19th centuries from the Antique City of Lychnidos (VII- VIIIth centuries BC), the City of Ohrid is one of the oldest settlements in Europe. Registered in the UNESCO World Heritage list in 1980, the cultural and historical area of the City of Ohrid, overhanging the eastern shore of Ohrid Lake (registered to the UNESCO in 1979), appears as a cultural centre of great importance for the history of the Balkan Peninsula, for all nations of the Slavonic tongue and more broadly for world history and literature.

Marked by the heritages of St Naum and St Clement's works who founded there at the end of the 9th century AC a Slavic church and university, Ohrid has a strong religious and historical echo, within a valuable and protected natural mountains and lake landscape. The studied perimeter will be the municipality of Ohrid.

The descriptive and quantitative grid of Cultural Tourism/Ohrid pilot is given in Appendix 1 to this Report.

ANALYSIS OF PILOT PROJECT'S POTENTIALS – CULTURAL TOURISM – OHRID

| STRENGTHS | WEAKNESSES |
|---|--|
| <p>Main strength: UNESCO site and brand name</p> <p>Heritage resources</p> <ul style="list-style-type: none"> - abundance of cultural heritage originating from all periods of human history (Neolithic, Early Antic – Bronze and Iron Age, Antic period – Greek and Roman, Late Antic – Early | <p>Heritage protection</p> <ul style="list-style-type: none"> - absence of cultural heritage management plans - existence of neglected monuments that have tourism potentials <p>Coherence of offer</p> <ul style="list-style-type: none"> - No links established between |

| | |
|---|--|
| <p>Christian, Medieval – Byzantine, Late Medieval – Ottoman, XIX Century Revival)</p> <ul style="list-style-type: none"> - great personalities connected with the City (St. Clement and St. Naum of Ohrid, Tsar Samuel, St. Erasmus, Grigor Prlicev) - Important ancient roads were passing through Ohrid (Via Egnatia) - good state of preservation of the main cultural heritage artifacts <p>Tourism infrastructures</p> <ul style="list-style-type: none"> - developed and diversified tourism infrastructure (hotels, Inns, camping, private accommodation, restaurants of all kinds) <p>Cultural dynamism</p> <ul style="list-style-type: none"> - Existing international cultural manifestations (Ohrid Summer Festival, Baptismal Ceremony with the catching the cross into the Ohrid Lake); | <p>spots: weak development of Story Lines, Heritage Trails or other cultural tourism products</p> <p>Interpretation and information</p> <ul style="list-style-type: none"> - lack of written interpretation of cultural spots; either basic signatures at the entrance and detailed explanation in form of communication material - lack of guiding offer in sites: no curator nor touristic offer for a guide - lack of media oral interpretation in cultural spots: no devices in form of audio material that the visitors can rent - lack of facilities to ensure visitors' comfort in spots: food and drink outlet, souvenir shops, toilet facilities - no information brochures about cultural sites in accommodation facilities <p>Inoperating facilities</p> <ul style="list-style-type: none"> - all of the 4 casinos are closed until unsettled deadline (expired licenses) |
| <p>OPPORTUNITIES</p> <p>Consensual positive opinions among tourist, inhabitants and local stakeholders</p> <p><i>sources: 2 (foreign and domestic) tourist surveys, 1 conducted by the Faculty of Tourism during high season (2005), the other by the Municipality of Ohrid within the project "Spirit of Ohrid" among stakeholders and local community (2007)</i></p> <ul style="list-style-type: none"> - great number of tourists estimating the potentials for cultural tourism very high (65%) - significant number of foreign tourist (60%) consider the presentation of the cultural heritage in Ohrid positive - significant number of the tourist evaluates the cultural heritage in the region as very | <p>THREATS</p> <p>Accessibility</p> <p>foreign tourists cannot easily reach Ohrid, coming with cars or by airplane</p> <p>Image and brand</p> <ul style="list-style-type: none"> - Cultural tourism brand not established and according to the opinion of the local community should be connected with the Ohrid Lake (79%) - faint image of the city on the international markets connected with cultural tourism potentials - absence of foreign markets analysis |

| | | |
|---|---|---|
| | <ul style="list-style-type: none"> - important (77%) - more than 80% of the foreign tourists have positive experience and consider the visited cultural heritage attractive and amusing - Local stakeholders and inhabitants consider that cultural heritage is significant base for development of tourism (71%) | <p>Current attendance characteristics</p> <ul style="list-style-type: none"> - many youngsters tourists and low spending holidaymakers whose visits are concentrated just in high season |
| Renown | <ul style="list-style-type: none"> - very popular resort known in Macedonia and the Balkan Countries - good guiding services available | <p>Urban management</p> <p><i>cultural spots protection issues (despite the UNESCO registration): necessity of find urban solutions for the surroundings of sites</i></p> <p><i>bad influence of commercialization in the city at expenses of the searched cultural and spiritual experience for culture</i></p> |
| Governance | <ul style="list-style-type: none"> - defined stakeholders in cultural tourism cluster (Ministry of Culture, Institute for protection of the cultural heritage, Religious organizations, Business sector, Professional associations, Local government) - existence of professional bodies at relevant stakeholders connected with cultural tourism - state subventions for incoming tourists - good structure of human resources | <p>Promotion and marketing</p> <ul style="list-style-type: none"> - weak tourism marketing, rarely targeted, fails to meet the needs of the tourism sector, and is under-funded - 75% of the local people have the opinion that cultural heritage is promoted and presented to the domestic and foreign markets on low/week level |
| Heritage protection and management | <ul style="list-style-type: none"> - good inventory of heritage resources - clear vision of the Institutions for protection of the heritage connected with the tourism potentials of the cultural heritage - as a part of urban plans for Ohrid, the conservation plan has been prepared for the historic core of the city | <p>Tourism offer</p> <ul style="list-style-type: none"> - weak tourist products based on cultural heritage - undeveloped standards for quality of cultural tourism products - many services not meeting the demands of modern tourists - many potential tourism services not well developed, and are not packaged in a way to make it easy for tourists to buy into additional excursions and activities, the fact that reduces customer spend |
| | | <p>Governance</p> <ul style="list-style-type: none"> - little cohesion within the tourism sector, with little cooperation between the private and public sectors - insufficient communication between stakeholders - not established cultural tourism network - unsecured connections and |

undefined responsibilities between different levels of the protection of the monuments, state and local institutions

- undeveloped techniques to collect data about visitors in cultural tourism (numbers, motivation for visit, level of satisfaction etc.)
- segmented and divided stakeholders
- not existing tourist information center
- not existing local tourism association
- undefined NGO sector not capable to be involved into the cultural tourism cluster
- people working in the tourism sector need to learn new skills
- lack of financial assets;

no structured offer connected to target groups and length of stay

bad image of tourist services: bad welcoming, unpoliteness, no foreign languages speaking

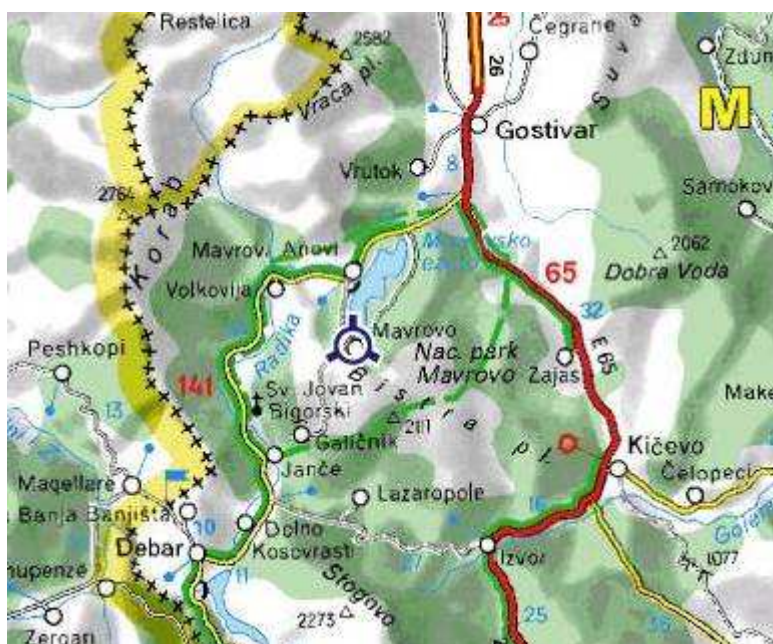
To lose status of world heritage;

Uncontrolled urbanization process;

Postponement of the adoption of the new Law for Ohrid;

Disputes between central versus local government.

2.2.4 Rural Tourism/ Reka Region



Bearing its name from the Radika river and its tributary small river mala Reka, the Reka region is located in Western Macedonia, in an area delimited by Debar, Mavrovo and Kicevo. It is a region of harsh relief with numerous peaks higher than 2500 meters, bordered with Sar Mountains in the North and Desat mountains in the south, Korab and Krcin mountains in the West and Bistra and Stogovo mountains in the East.

Our perimeter of study will centre on a diagonal fringe of Reka region (7 villages) mainly on the eastern shore of the Radika river, from Rostuse in the Southwest to Mavrovo Lake in the Northeast. This perimeter is included in the Municipality of Mavrovo-Rostuse, at the heart of Mavrovo National Park (73 088 hectares).

The descriptive and quantitative grid for Rural Tourism – Reka Region is presented in Appendix 1 to this Report.

ANALYSIS OF PILOT PROJECT'S POTENTIALS – RURAL TOURISM – REKA REGION

| STRENGTHS | WEAKNESSES |
|---|--|
| <p>Richness of environment and natural resources</p> <ul style="list-style-type: none"> - traditional villages - unpolluted area - very low density of population - agricultural, farming and crafts activities - important number and high quality of natural attractions: rivers, canyons, waterfalls, lake, forests - high-mountained landscape <p>Existence of some amenities/ spots for sports and leisure</p> <ul style="list-style-type: none"> - existence of some spots and nature activities paths: 400 kilometer hiking paths and 3 biking paths in Mavrovo National Park - wild beaches | <p>Lack of tourism infrastructures and skills</p> <ul style="list-style-type: none"> - lack of accommodation facilities and capacities - no catering trade facilities except inside hotels - no accommodation the inhabitants' places - no professional and trained human resources <p>Lack of spatial indications</p> <ul style="list-style-type: none"> - lack of roadsigning for spots paths - no signposting for natural and cultural spots <p>Lack of resources interpretation facilities</p> <ul style="list-style-type: none"> - lack of cultural interpretation of the region - no nature interpretation of the region's resources |
| OPPORTUNITIES | THREATS |
| <p>Geographic location</p> <ul style="list-style-type: none"> - location in Mavrovo National Park, which can be an attractiveness factor and a promotional framework - presence of the Mavrovo ski centre which can ensure a tourism spread over the year - presence of the village of Galicnik, famous for the displays of Macedonian traditional in July <p>An innovative initiative on heritage protection in Jance: Tefik Tefikoski (hotel Tutto manager)</p> <ul style="list-style-type: none"> - purchase and rebuilding old housed with traditional an sustainable building techniques - involvement in Slow Food movement <p>Involvement in international cooperation programmes</p> <ul style="list-style-type: none"> - involvement of the region in the cooperation programme between Macedonian government and the French region of Basse-Normandie - cooperation project between Mavrovo National Park and Italy on staff professionalization (guides) | <p>Poor quality of infrastructures</p> <ul style="list-style-type: none"> - low quality of road infrastructures leading to villages - no common waste water management system <p>Heritage protection:</p> <ul style="list-style-type: none"> - no protection status for built heritage <p>Governance:</p> <ul style="list-style-type: none"> - lack of unity and dialogue between the municipality of Mavrovo-Rostuse, Mavrovo National Park and the economic/ tourist stakeholders - any registration of private accommodation <p>No marketing offer proposing rural tourism's priority components (nature activities/ inhabitants meetings/rural customs and traditions discovering/ local economy)</p> <ul style="list-style-type: none"> - still no offer to meet the inhabitants/ local peoples |

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| | <ul style="list-style-type: none">- still no offer to discover the region economic activities and gastronomy (crafts, shepherding, farming and cattle breeding, cheese making)- only punctual offer to discover the region's intangible heritage (Galicnik)- no managed guided nature sightseeing (any tourist hiking nor biking organized sessions) <p>Image and renown</p> <ul style="list-style-type: none">- little developed image, except for some isolated spots (Mavrovo ski centre, Galicnik)- existence under the Mavrovo National Park territory and label, whose coming promotion activities are not focused on villages tourism |
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2.2.5 Mountain Tourism and Nature Activities - Sar Planina



The Sar Planina Mountain range extends across an area of 1600 km² between Southern Kosovo, Northwestern Macedonia and Northeastern Albania. It is one of the highest mountain range in the Balkans with an average height of peaks of 2200 meters, out of which one of the highest Macedonian peaks, Titov Vrv (Tito's peak, 2747 meters). With more than 30 glacier lakes, over 200 springs of pure water, and 2000 flora and hundreds fauna species the Shara mountains are rich of natural resources. It also hides many historic heritage spots that keep on being highlighted by the current multicultural diversity of the region.

The mountain Shara region covers the municipalities of Tetovo, Bogovinje, Tearce, Jegunovce, Vapciste. Our perimeter of study will however focus on the Municipality of Tetovo, in particular its 2 main areas: the city of Tetovo and Popova Shapka, one of the oldest and most famous ski resort, located on the Sar Mountain, from 1700 to 2500 meters high.

The descriptive and quantitative grid for this pilot theme is given in Appendix 1 to this Report.

ANALYSIS OF PILOT PROJECT'S POTENTIALS

| STRENGTHS | WEAKNESSES |
|---|---|
| <ul style="list-style-type: none"> - Renown of Popova Shapka ski resort at national and international-regional level | <p>Urban planning and environment protection</p> <ul style="list-style-type: none"> - disorderly urban pattern due to |

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| <p>(tourism golden age in the 1970-1980's)</p> <ul style="list-style-type: none"> - Natural, spatial, climate and relief conditions for development - Relatively stable infrastructural functionality of the ski lifts and trails for the development of winter - sports tourism activities - Existing trails for summer sports activities: hiking trails, biking, climbing.... | <p>the Absence of Detailed Town Planning Scheme (DTS) Popova Shapka: obstacle for finding investors who would invest in the construction and modernization of the centre</p> <ul style="list-style-type: none"> - non existence of urban plan for any potential location for development tourism in the remaining municipalities - lack of sanitary - hygienic infrastructural drainage facilities in function of the protection of the environment <p>Accesses/ road infrastructures</p> <ul style="list-style-type: none"> - regional road Tetovo Popova Shapka in bad conditions: reconstruction needed - some tourists attractions unavailable for the tourists because not connected to the inhabited places === need to build mountain roads - dysfunction of the rope-railway from Tetovo to Popova Sapka <p>Accommodation facilities</p> <ul style="list-style-type: none"> - ageing of hotel facilities, especially of the public ones (built in the 1970's) - unsettled status and future of a number of old accommodation facilities, which used to be socially owned and which do not seem to have been privatized and refurbished in order to be marketed again - important number of secondary residences certainly under-used and which could be considered for a more organized marketing approach, like in the case of Mavrovo <p>Leisure offer</p> <p>Apart from ski, no leisure offer in Popova Shapka resort</p> <ul style="list-style-type: none"> - no animations on evenings - no restaurants out of hotels - no cultural activities - no other sports activities (swimming pool, ice rink...) <p>Summer nature activities</p> <p>Low development of summer nature activities in the municipality: horse riding, bird watching, parachuting,</p> |
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| | paragliding |
| <p>OPPORTUNITIES</p> <p>Location</p> <ul style="list-style-type: none"> - Proximity of the City of Skopje and Skopje airport (around one hour by car) - geostrategic position near borders with Albania and Kosovo for the development of his objective to become a regional competitive destination - proximity of Popova Shapka to the city of Tetovo (20 minutes by car, 1500 meters difference in altitude) <p>Management</p> <ul style="list-style-type: none"> - state-management of Popova Shapka, ski resort permitting direct action means from the national level - involvement of national level in the development of the Shar region (Shar region management plan) | <p>THREATS</p> <p>Investments</p> <ul style="list-style-type: none"> - minimal private investments in Popova Shapka - location in a politically sensitive region bordering with Kosovo, which may currently not necessarily appeal to international and regional investors and developers. <p>Communication/ promotion</p> <ul style="list-style-type: none"> - a too minimal website for the Popova Shapka ski resort, which does not propose any offer - no existing tourism portal website for the Municipality of Tetovo - no existing official web site for the Sar region <p>Urban planning:</p> <ul style="list-style-type: none"> - emergence of illegal constructions at expenses of the environment protection <p>Marketing offer</p> <ul style="list-style-type: none"> - absence of intermediary business activities in the sense of involvement of world tour operators in the marketing of the tourist offer - acceptance of the activities in the context of staffing based on seasonality |

3. TOURIST PRODUCTS AND ACTION PLANS

3.1. Tourist Products to Develop

3.1.1. Lake Tourism Product

3.1.1.1. Product's description through actions

Targeted geographic markets:

- a large domestic market
- regional: Serbians; Bulgarians, Northern Greeks or Greeks on their way to a Balkan holiday tour

Targeted market segments:

- families
- seniors
- campers/ camping vans

The Western European clientele should not be a targeted priority geographic market. However, some of their market segments could be marginally concerned or attracted (campers, seniors).

| | Domestic market | Regional market | Western European |
|----------------------|--|-----------------|---|
| PRODUCTS' PHILOSOPHY | Authenticity, leisure and well-being at lake side | | Lake-side argument cannot be advanced as primary criterion of attractiveness to international western European tourists. Once all hereby described actions will have been implemented, a focus on Dojran's cultural heritage will be promoted in addition to this lake-side offer |
| OBJECTIVES | A- Re-developing leisure activities along with the western lake shoreline urban development B- Re-centering Dojran's offer on water customs and traditions C- Developing health and spa potentialities D- Improving accesses and flows regulation | | |

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| OFFER | A- Redeveloping leisure activities along with the western lake shoreline urban development | |
| | A.1. developing a small leisure and fishing harbour (marina) | |
| | A.2. setting up an investors tender for the development of a commercial zone to gather souvenir shops, clothes shops and restaurants on the shoreline or near the shorelines and beaches (location to be defined after urban study) | |
| | A.3. developing sweet water activities spots close to beaches: pedal boats, sailing, jet ski... | |

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| | A.4. developing bike rentals near the shoreline (in accordance with the shoreline biking path which is being created) | |
| | A.5. setting up a cultural and musical programme to be held in the lake shoreline and town (near cultural spots) during spring, summer and autumn time (popular tourist events + 1 “elitist” show) with adapted frequency (weekly programme during summertime) | |
| | A.6. setting up an investors tender for the creation of shops/ trade linked with the identity of Dojran (see objectives B and C): fishing (and hunting equipment), beauty care shops....(échéance un peu plus longue que les créations de commerce ci-dessus) | |
| | B- Recentering Dojran’s tourist offer on water/fishings customs and traditions | |
| | B.1. signposting authentic fishermen’s huts in order to enhance them as “must-see” spots | |
| | B.2. reconstituting fishermen’s huts near every beach with traditional techniques, in order to convert it into an iconic product | |
| | B.3. revealing the human aspect of traditional fishing by organizing displays of traditional fishing as tourist attractions | |
| | B.4. creating a major cultural and popular annual event on Fishing topic (fish tastings, local traditional music...) | |
| | B.5. Submitting and application form to the Ministry of Culture for the legal protection of fishing heritage (fishermen’s huts) | |
| | B.6. Encouraging the development of traditional fish restaurants | |
| | C- Developing spa and health potentialities | |
| | C.1. Improving/ renovating the water management system as a precondition (water supply and waste water system) | |
| | C.2. Carrying out works to dig a hole in the soil and routing water from the hot natural thermal sources in New Dojran | |
| | C.3. making a feasibility study for the creation of a leisure spa centre with accommodation in New Dojran proposing care treatment based on the use of lake’s beneficial natural resources | |
| | C.4. developing spa services in accommodation facilities | |
| | C.5. making a feasibility and market study for the development of a medical thermal establishment for courses of water treatment (thermal tourism to senior populations) | |
| | D- Improving accesses and flows regulation | |
| | D.1. Roadsigning any single tourist facilities or spots (hotels, beaches, Tourist Information Centre, archaeological sites and cultural spots) | |
| | D.2. Making a study for the construction of a new road for commercial trucks to the border crossing, for the trucks to be deviated from the regional road crossing the town | |
| | E- Sorting out the accommodation facilities decreasing | |
| | E.1. Launching a study to determine global needs regarding accommodation facilities | |
| | E.2. Setting up a registration framework and method to register private accommodation and measuring incomes | |
| | E.3. Finalizing the current long-lasting accommodation facilities renovations | |
| | E.4. Accelerating the Detailed Urban Plan Voting in order to fix the lands dedicated to the creation of new accommodation facilities | |

3.1.1.2. Actions to the product's implementation and success

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| GOVERNANCE | G.I. Developing an across-lake cooperation for a Dojran trans-border destination | |
| | G.I.1. developing a more strategic and lake-targeted shared cross-border strategy with the neighbouring Greek Municipality of Dojrani | |
| | G.I.2. Developing new cross border or international cooperation projects with lake-side municipalities on tourism issues (in Greece in particular) | |
| | G.I.3. Developing partnerships with foreign environmental actors specialized in nature and lake heritage protection | |
| | G.II. Enhancing local-national cooperation on the stake of revival of declining lakeside resort and nature vaporization and safeguard | |
| | G.II. Building up a cohesive network of stakeholders around lake tourism development | |
| | G.II.1. organizing consultation workshops gathering local leaders and economic/ tourist stakeholders on order to work on an harmonized tourist offer (seasonalities and opening periods, differentiated prices according to seasonalities, promotion...) | |
| | G.II.2. organizing an annual meeting between national , Dojran and Ohrid local representatives in order to share lake tourism development experiences | |
| | G.II.3. insertion in state-financed training programmes for accommodation staff | |

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| MARKETING | G.I. Reinforcing the role of the current Tourist Information Centre (therefore to be renamed "Tourism Office" | |
| | G. I.1. Adding a professional guide to the staff members and proposing guided tours (for example displays of fishing techniques and traditions, guided tour of Dojran's main cultural spots) | |
| | G.I.2. Creating innovative tourist stays packages (from 2 days to 2 weeks, with different level of accommodation comfort, with different themes: spa-oriented, leisure oriented...) | |

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| COMMUNICATION/ PROMOTION | CP.I. Redesigning or developing media promotion tools displaying a family and popular offer, as well as offer of nature and well-being. | |
| | CP.I.1. Creating a Tourism Office website (as the official Dojran tourism portal) in Macedonian, English and Greek languages with lively colours, regularly updated with cultural events and tourist news | |
| | CP.I.2. Remaking the design of one only destination promotion video and putting online only this video in Macedonian, English and Greek <i>NB: currently on the municipality website, large number of videos only in Macedonian, sometimes old, and with no clear message</i> | |
| | CP.II. Creating paper promotion supports to be broadcasted to tourists at local and national level | |
| | CP.II.1. Writing, designing, and publishing a brochure in English, Macedonian, and Greek about Dojran spots and offer, which will be available at the Tourist Office and in every accommodation facilities | |
| | CP.II.2. Publishing posters of Dojran's cultural events to be displayed in | |

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| | the neighbouring villages, towns and in Skopje | |
| | CP. III. Developing media relations on events | |
| | CP.III. 1. developing collaborations with the local and national press | |
| | CP.III.2. welcoming popular TV shows | |
| | CP.III.3. inviting national or regional (Balkans, Greece) popular singers and artists to give concerts | |
| | CP.III.4. organizing popular sports events with national echo | |

3.1.2 Wine Tourism Product

Targeted geographic markets:

- domestic, especially from Skopje
- regional market, Greece included
- western Europeans
- worldwide wine lovers or professionals

3.1.2.1. Product's description through actions

| | Domestic market | Regional market | Western European and world |
|----------------------|---|-----------------|----------------------------|
| PRODUCT'S PHILOSOPHY | Tikves, historic vineyard valley Discovering wine traditions of Macedonia | | |
| OBJECTIVES | A- Creating a spatial coherent wine road offer B- Creating a visible wine identity offer C- Improving visitors welcoming and participation D- Coupling wine issues with gastronomy and culture | | |

| | |
|-------|---|
| OFFER | A- Creating a spatially coherent wine road offer |
| | A.1. Installing roadsignings and signpostings to indicate any winery, accommodation and catering trade facilities, cultural spots |
| | A.2. Tracing 2 car visits routes (a 1-day route/ short, a 2-3 day-route/ long) with appropriate roadsigns |
| | A.3. Making a feasibility and programming study for a Wine and Vineyards Interpretation Centre to be created in a central strategic location |
| | A.4. Setting up an investors tender for the creation of new typical accommodation facilities in wineries (or near) |
| | B- Creating a visible wine identity offer in urban and rural spaces |
| | B.1. Adapting urban scenery and design to the region wine identity (decoration of villages square with items) related to wine |
| | B.2. Improving the wineries inner spaces' design |
| | B.3. Broadening the importance and echo of the existing Wine Festival in Kavadarci (enlargement of duration, creating several related events/animations at the same time in all different municipalities, creating an important wine fair by inviting foreign wine producers) |
| | B.4. Creating new cultural events dedicated to wine during spring and summer time: wine music and dance festivals |
| | B.5. Creating in municipalities shops selling local wine bottles (as well as some foreign) |
| | C- Improving visitors welcoming and participative roles |
| | C.1. Improving the professionalism of wineries visiting (circuit, guiding services) (especially public wineries) by organizing trainings programmes |
| | C.2. Improving the design and comfort of public wine caves visits, in particular with the creation |

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| | of real reception rooms and tasting spaces |
| | C.3. Generalizing the guided visits in all wineries |
| | C.4. Developing free visits for individual tourists, by attracting them thanks to road signs and signpost located near each winery, and proposing free welcome and tasting |
| | C.5 Organizing sessions/internships of oenology and tastings opened to all publics |
| | D- Coupling wine issues with gastronomy and history |
| | D.1. establishing partnerships between wineries and the existing traditional restaurants |
| | D.2. setting up investors tenders for the creation of traditional Macedonian restaurants |
| | D.3. creating of a small Historic museum of Vineyards and Wine making in Villa Maria winery, symbol of Slavian history (Maison de la Femme du Prince de Serbie, entre 2 guerres), accessible out of the Winery |

3.1.2.2. Actions to the product's implementation and success

| | |
|------------|---|
| GOVERNANCE | G.I. Creating and implementing a creation a development strategy associating the national level, the municipalities, the Tikves wine road Foundation and the wineries |
| | G.I.1. At national level, creating a cooperation framework between the Ministry of Economy-tourism department and the National Agency for promotion and support of tourism for a creation of a Macedonian Wines Foundation/ organization at national level |
| | G.I.2. Creating and implementing a cooperation framework of regular consultations between national representative (new National Wine Foundation), municipalities, Tikves wine route foundation at local level and wineries, in order to work on the creation of a coherent and strong wine offer |
| | G.I.3. Organizing regular workshops between the Tikves Wine road foundation and the wineries-members in order to implement and harmonize the wine offer development perspective which will have been retained |
| | G.II. Keeping on developing a “terroir” approach (integrated community-based concept on wine and wine tourism) through the reinforcement of international cooperation managed by the Tikves Wine route Foundation |
| | G.II.1. developing a bilateral cooperation with Serbia in order to highlight and promote the royal wine production history of the Karadjordjevic dynasty, through a “twinning” between the Elenov Winery in Demir Kapija and the equivalent wine producers in Serbia |
| | G.II.2 initiating of a global cross-border cooperation project allying all the countries global cross-border cooperation project allying all the countries issued from the former Yugoslav Federation (including Kosovo), in order to promote the overall itinerancy destination and network of “Vineyards and Wines of South Slavs”. Indeed, each of the countries issued from the former Yugoslavia have wine producing regions and traditions, which are geographically and culturally different and thus complementary, so that the potential attraction of such an itinerant global product would be strong both for the regional and more distant markets, offering also the interesting possibility of tailoring the products into packages of variable size & thematic focus. |

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| MARKETING | M.I. Opening of the Tourism Office in Negotino (and creation of tourist info points in the municipality of Kavadarci, Demir Kapija, and in the archaeological site of Stobi) to sell proposed tourist packages |
| | M.I.1. proposition of 1-day thematic visits coupling wine, gastronomy and cultural heritage, directly sold to visitors at the Tourism Office and tourist info points |
| | M.I.2. proposition of thematic tourist packages to the tour operators |
| | M.II. Developing wineries marketing (through web tools, see communication/promotion below) the wine selling from the wineries’ own websites (currently not developed) for the national, regional, and international markets |

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| | M.II.1. developing wine bottles selling platforms on their websites |
| | M.II.2. directly selling online accommodation stays, catering trade services for events and half-days visits and other longer wine discovering sessions) |

| | |
|-------------------------|---|
| COMMUNICATION/ IMAGE | CP.I. Designing and developing web communication and promotion associating national and local level |
| | CP.I.1. Designing and developing a National Wine tourism Portal as the official Macedonian wine tourism display, focused on Tikves wine tourism geography and product |
| | CP.I.2. Designing and developing Tikves region tourism webportal as a cooperation between Tikves Wine road foundation and the Tourism Office, including a presentation of the region, mapping and links of every wineries' websites, cultural spots, and tourist packages proposed to individual tourists |
| | CP.II. Publishing written promotion brochures |
| | CP.II.1. Designing and publishing a free Tikves region promotion document (presenting its tourist sites, archaeological spots, grapes resources and wine making industry), available at the Tourism Office, in every winery and accommodation facility |
| | CP.II.2. Writing, publishing and selling a book about local history of wine growing and making, presentations of grapes varieties and wines |
| | CP.II.3. Developing in each winery a presentation and promotion leaflet s (1 to present their offer (visits, catering, accommodation) and 1 displaying their wine selling prices) to be distributed to any single visitor |
| | CP.III. Developing and spreading Macedonian wine tourism at national scale, for a better national, regional and international visibility |
| | CP.III.1. through National Wine tourism Portal (see CP.I.1.) |
| | CP.III.2. by designing posters advertising wine regional cultural events, to be stuck in Skopje and Macedonian municipalities |
| | CP.III.3. by inciting the opening of shops selling Macedonian wines in strategic tourist places (1 in Skopje, 1 in Ohrid) |
| | CP.IV. Developing networking promotion |
| | CP.IV. 1. Insertion into wine tourism networks Internet platforms |
| | CP.IV.2. Invitation of tourist, wine and gastronomy journalists and guides writers |
| | CP.IV.3. Sending of a specialized newsletter to a defined list of prescribers |
| | CP.IV.4. Invitation of tourist, wine and gastronomy journalists and guides writers |
| | CP.IV.5. Invitation of wine tourism specialized tour operators |

3.1.3. Cultural Tourism Product

3.1.3.1. Product's description through actions

Targeted geographic markets:

- local peoples, first concerned by heritage enhancement
- domestic and regional tourists spending their holidays in Ohrid or near or coming in Ohrid for city-breaks
- tourists from Europe or all over the world visiting the Balkans (within guided tours or on their own) or making a broader visit tour of cultural European destinations.

Targeted market segments:

- couples
- seniors

| | Domestic market | Regional market | Western European and world |
|----------------------|---|-----------------|----------------------------|
| PRODUCT's PHILOSOPHY | Ohrid, City of Cultures | | |
| OBJECTIVES | A- Creating a spatially coherent cultural product B- Boosting the development of Ohrid and enlarging its "tourist daytime" to the night period C- Broadening and boosting Ohrid to the concept of multicultural city D- Improving visitors' cultural understanding and comfort | | |

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| OFFER | A- Creating a spatially coherent cultural product |
| | A.1. Roadsigning the Old City of Ohrid in every corner of the City and installing roadsigns for every cultural spot located in other parts of the City and Municipality |
| | A.2. Tracing 2 cultural tracks (1 long, 1 short) in the Old City of Ohrid with appropriate roadsignings connecting all spots and proposing a sense of visit |
| | A.3. Tracing thematic cultural routes in all the municipality of Ohrid: (archaeological, customs...) |
| | A.4. Making a feasibility and programming study for the creation of an interpretation facility/ museum about Ohrid intangible heritage through all historic times using ICT and media technologies |
| | A.5. Making a feasibility and programming study for the creation a "House of Ohrid History" using ICT and media technologies |
| | B- Boosting the development of the Old Town of Ohrid and enlarging its "tourist daytime" to the night period |
| | B.1. Making an urban study of the accesses to the Old Town of Ohrid and of car park spaces around |
| | B.2. Making a study about public lighting in the Old Town of Ohrid and elaborating a "Light Plan for Ohrid Heritage" |
| | B.3. Tracing an "Ohrid by night" pedestrian track/route in the Old Town |
| | B.4. Elaborating a Trade and Urban Plan for the Old Town to fix spaces/facilities for the creation of quality small tourism facilities in the Old Town: accommodation in typical housing (in |

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| | traditional private apartments or small hotels, at inhabitants' places) and traditional restaurants |
| | B.5. Setting up an investors tender to the installation of identity stores in the upper Old Town, including a very restrictive list of stores fields: cultural shops and libraries, art galleries... |
| | C- Broadening and boosting Ohrid towards the concept of multicultural city |
| | C.1. Influencing the street culture by government subsidizing the artists through state-sponsored spectacles: producers of icons and crafts, national dance performers, selling souvenirs connected to cultural sites, Macedonian music selling |
| | C.2. Setting up a detailed programme of day and night cultural and folklore events from Spring to Autumn in the Old Town: light and sound shows based on historic periods ("antic theater", reconstitutions of traditional feasts with local music and costumes...). With adapted frequency (weekly programme during summer time) |
| | D- Improving visitors' guidance, understanding and comfort |
| | D.1. Creating a small tourist info centre inside the Old Town of Ohrid : information, guiding services of the Old Town, renting of media interpretation equipment (audio guides) |
| | D.2. Installing signposts in front of every cultural spot (written or media cartels, in Macedonian, English, German and Italian) |
| | D.3. Developing guiding services (in spots or through the tourist info centre) |
| | D.4. Building essential facilities in/near to cultural spots: toilets facilities, souvenir shops, food and drink outlets |
| | D.5. Developing small interpretation centres near the archaeological spots |

3.1.3.2. Actions leading to the product's implementation and success

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| GOVERNANCE | G.I. Enhancing cultural heritage protection and management |
| | G.1. Making management plans prerequisite for involvement of tourist activities |
| | G.2. Preparing process and systems to measure the effectiveness of the plans and quality criteria fulfillment |
| | G.3. To set up a process for measuring the collection of information about visitors in all spots (number and flows, motivations for visit, level of satisfaction etc...) |
| | G.II. Building up a cohesive local network of stakeholders in the field of cultural tourism |
| | G.1. Appointing local leaders as the ambassadors and decision-makers in cultural tourism |
| | G.2. Organizing civil educational workshops gathering political and civil actors in order to explain and sensitize the local communities to the essence and benefits of cultural tourism |
| | G.3. Developing an effective tourism association that as a vital actor in the tourism sector, bringing together the development of services, and ensure integrated marketing of the resort |
| | G.4. To establish a permanent training center for LLL (life-long-learning) platform |
| | G.5. setting evaluation systems in order to measure the cultural tourism impact at all stakeholders and in the local community |
| | G.III. Going in regional and international governance in greater depth |
| | G.III.1. Establishing a UNESCO regional office in Ohrid |
| | G.III.2. Joining a cultural heritage cities international or regional network in order to learn from best practices in cultural tourism |
| MARKETING | M.I. Creating strong and innovative cultural heritage-focused packages (2 days to 15day packages) |
| | M.I.1. Creating a Tourism office (with one desk in Ohrid Lower and 1 in upper core city) in charge of building these packages |
| | M.I.2. Creating 2 main categories of packages: cultural-ludic packages "for culture-curious" and one cultural-elistist packages for passionate |

| | |
|-----------------------------|--|
| | M.I.2. Setting up a process for the diffusion of these packages (with preference for web marketing tools: website for packages directly sent to the visitors in site, newsletter to tour operators for professional packages) |
| COMMUNICATION/ PROMOTION | <p>C.I. Developing Ohrid media promotion through the creation of Ohrid Tourism Office official website (to become the Official Ohrid Tourism portal)</p> <p>C.I. 1. Writing contents about Ohrid cultural spots and cultural events with 2 different tones in order to generalize culture: 1 ludic tone for culture-curious and 1 culture-elitist tone for passionate tourists</p> <p>C.II. 2. Putting online packages directly proposed to individual tourists</p> <p>C.II. Writing, designing, publishing a brochure in different languages about Ohrid spots and offer. Will be available at the Tourism Office+ in every accommodation facility</p> <p>C.II.1. Writing, designing, and publishing a brochure in different English, Macedonian, German, Italian, about Ohrid spots and offer</p> <p>C.II.2. Organizing their diffusion at local (Tourism Office, accommodation facilities) and international (foreign tour operators) level</p> <p>C.III. Developing networking promotion</p> <p>C.III.1. Inviting international journalists specialized in cultural tourism and heritage issues</p> <p>C.III.2. Inviting specialized tourist guides writers</p> <p>C.III.3. Inviting managers of tour operators specialized in cultural tourism and city breaks</p> |

3.1.4. Rural Tourism Product

Targeted markets:

- geographic markets
 - domestic, especially people living in an urban environment
 - regional, willing to discover Macedonia's rural customs and inhabitants
 - western European, willing to get authenticity and practice nature sports
- market segments
 - single persons or couples without children (foreigners), Macedonian families
 - mainly people between 20-45 years old, looking for authenticity, sociability and adventure
 - small size groups: associations, guides excursions proposed by regional tour operators

3.1.4.1. Product's description through actions

| | Domestic market | Regional market | Western European |
|----------------------|---|-----------------|------------------|
| PRODUCTS' PHILOSOPHY | Immersion in Macedonia's authenticity | | |
| OBJECTIVES | A- Developing authentic accommodation facilities B- Developing nature activities and interpretation C- Developing customs, crafts and gastronomy activities D- Improving management of natural resources | | |

| | |
|-------|---|
| OFFER | A- Developing authentic accommodation facilities |
| | A.1. Launching a study to determine the conservation state of built heritage in the perimeter National Park and the renovation needs |
| | A.2. Elaborating an Economic Development Plan at the Mavrovo National Park scale <ul style="list-style-type: none"> - identifying available spaces or facilities to be renovated in view of the creation of identity accommodation facilities - fixing spaces for accommodation purposes |
| | A.3. Setting ups investors tenders for the development of new forms of accommodation linked with the identity of Mavrovo National Park: <ul style="list-style-type: none"> - holiday cottages for groups and families - Park shelters and accommodation houses - complexes of tourist apartments with respecting in their construction a rural and wooden identity |
| | A.4. Submitting and application form to the Ministry of Environment for the legal protection of villages houses built with traditional tools and techniques(Jance) |
| | A.5. Developing camping areas around water spots |
| | B- Developing nature activities and interpretation |
| | B.1. Making feasibility and programming study of the House of Mavrovo National Park (project |

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| | currently the National Park's pipeline). In the terms of reference, conceiving it as an Interpretive storefront of Mavrovo National Park and its natural resources |
| | B.2. Mapping Mavrovo National Park tracks (400 km of hiking paths and 3 new mountain bike tracks) and spots (fishing spots, beaches, hunting grounds) |
| | B.3. Creating and mapping Interpretive Nature Trails with adequate signposting - Flora and Fauna trail - Sports and Health trail - Adventure Trail |
| | B.4. Roadsigning and signposting every single trail and natural spot with appropriate and identity-marked sign materials |
| | B.5. Elaboration of a study for water activities development on river and canyons: kayaking, sailing., canyoning |
| | B.6. Development of spots for air extreme spots: paragliding, parachuting, hang-gliding, climbing |
| | B.7. Developing beaches equipment and facilities: pedal boats, deckchairs etc.... |
| | C- Developing customs, crafts and gastronomy activities |
| | C.1. From the Galicnik museum in Villa Dosta, creating a major ecomuseum near the House of Mavrovo National Park presenting the history of all traditional villages, the traditional customs and ways of life |
| | C.2. Recensing all local producers workshops (different types of crafts, shepherds, cheese producers...) in order to develop in site meetings and visits |
| | C.3. Creating a cultural-customs routes involving heritages facilities |

3.1.4.2. Actions to the product's implementation and success

| | |
|------------|--|
| GOVERNANCE | G.I. Initiating an integrated cooperation framework around Mavrovo National Park as a key focal point |
| | G.I.1. Redefining from national level (Ministry of Environment, ministry of Economy- Tourism department...) the competencies sharing framework between Mavrovo National Park and the Municipality of Mavrovo Rostuse as well as the competencies harmonization needs |
| | G.I.2. Shaping a cooperation and consultation framework between Mavrovo National Park, the Municipality of Rostuse and economic/ tourist stakeholders |
| | G.I.2. Organizing monthly consultations on the National Park Management Plan writing progress gathering representatives from the National Park, the Municipality, economic/ tourist stakeholders and local communities |
| | G.II. Boosting the Italian bilateral cooperation in order to emphasize the responsibility of the National Park for the sustainable organization and development of Mavrovo as a professionalized tourism destination (guiding marketed activities) |
| | G.III. Creating a cooperation framework on built heritage protection and crafts enhancement issues |
| | G.III.1. Organizing national consultations between the concerned Ministries (Ministry of Environment, Ministry of Culture, Ministry of Economy), the National Park, the Municipality and representatives from the crafts and local heritage protection community in order to consider the current situation and development perspectives |
| | G.III.2. Organizing working sessions between the Ministry of Culture and representatives from the region in order to think about the creation of a legal status/ label and the elaboration of management plans for the protection of traditional built heritage |

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| MARKETING | G.I. Reinforcing the role of the current Tourist Information Centre (therefore to be renamed |
|-----------|--|

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| | “Tourism Office”) apart from its information and (soon) promotion roles |
| | G.I.1. Proposition of managed and guided 1-day activities to be proposed directly to the visitors (guided hiking tours, managed sports activities etc....) |
| | G. I.2. Creation of innovative rural tourism packages for tour operators |
| | G.I.3. Creation of educational packages to Macedonian schools |

| | |
|-----------------------------|---|
| COMMUNICATION/ PROMOTION | CP.I. Creating media communication and promotion tools |
| | CP.I.1. Creating an official website in Macedonian, English, Albanian, Italian languages for Mavrovo National Park presenting its natural resources, facilities, activities and sports/nature routes and tracks |
| | CP.I.2. Designing and producing an attractive promotional video in Macedonian, English, Albanian and Italian (to put online in the website) |
| | CP.I.3. Putting online proposed the different tourist packages, with links to the partners travel agencies’ websites (which include the destination in their offer) |
| | CP.II. Publishing different promotional brochures in Macedonian, English, Albanian and Italian |
| | CP.II.1. one brochure focused on nature and sports activities |
| | CP.II.2. one brochure focused on villages, gastronomy and customs |
| | CP.II.3. one brochure focused on accommodation facilities |
| | CP.II.4. one brochure dedicated to schools and primary teachers, displaying all proposed educational stays and courses |
| | CP.III. Developing networking promotion |
| | CP.III.1. invitation of journalists and guide writers specialized in ecotourism |
| | CP.III.2: representation in some proximity fairs |
| | CP.III.3. invitation of some specialized European travel agencies |

3.1.5. Mountain Tourism and Nature Activities Product

3.1.5.1 Description of tourist product

Targeted markets:

- geographic markets
 - reinforcing the attractiveness among domestic market
 - gaining the loyalty of proximity region markets (Kosovo, Albania...) and attracting new regional markets
- markets segments
 - medium and well-off social categories
 - families, couples during winter
 - young adults 18-35 years old
 - groups during spring and summer: schools trips and summer camps, associations, accompanied groups of senior people

| | Domestic market | Regional market | Western European |
|----------------------|---|--|--|
| PRODUCTS' PHILOSOPHY | Sports, nature and leisure under Macedonia's sun | Sports, nature, and culture within Macedonia's diversity | |
| OBJECTIVES | A- upgrading the quality and diversity of tourist facilities B- creating a core resort in Popova Shapka with a broader mixity of functionalities and activities: leisure, shopping and culture C- reinforcing the external and internal accessibility of Popova Shapka D- Developing and diversifying sports and nature activities in the overall Municipality of Tetovo | | Mountain tourism is not considered as a product to promote as a priority to this market Once all actions to domestic and regional markets will be implemented, a focus on nature activities will be promoted with particular focus to international western Europe market |

| | | |
|-------|--|--|
| OFFER | A- Upgrading the quality and diversity of tourist facilities | |
| | A.1. renovating the current 7 hotel facilities in Popova Shapka | |
| | A.2.. proposing in accommodation facilities information services and animations/ shows during evenings | |
| | A.3. modernisation of ski lifts equipment in Popova Shapka: creation of large ski chair lifts in order to free spaces and reduce the number of posts | |
| | A.4. Development of process for finding strategic investors (private investments today minimal in the ski resort) | |
| | A.5. Census and systematization of all facilities for accommodation and | |

| | | |
|--|--|--|
| | food in the whole Municipality of Tetovo and creation of database | |
| | A.6. Setting up a specific (foreign) investors tenders for the creation of new “mountain-connoted” accommodation facilities: small size hotels and apartments residences | |
| | B- Creating a core resort in Popova Shapka with a broader mixity of functionalities: leisure, shopping and culture | |
| | B.1. Elaborating a Detailed Town Planning Scheme (DTS) for Popova Shapka: ownerships, locations, possibility for investment and expansion, locations for new hotel complexes and service facilities. Must also include a Landscaping Charter | |
| | B.2. creation of a Tourism Office in Popova Shapka | |
| | B.3. setting up investors tenders for the creation of restaurants (presently only inside hotels), cafés and tea salons in the core resort village, out of hotels | |
| | B.3. setting up investors tenders for the creation of sports clothes shops and souvenir shops | |
| | B.4. making a feasibility study for the creation of a sport centre working both in winter and summer: ice-rink during winter time, swimming pool with small spas, bowling, inner basket stadium, games | |
| | B.5. making a programming study for the creation of a small Leisure and Cultural Centre proposed diversified leisure and cultural activities during evenings: cinema service, shows, games | |
| | C- Reinforcing the external and internal accessibility of the municipality of Tetovo | |
| | C.1. Redoing the upper part of the regional road linking Tetovo and Popova Shapka | |
| | C.2. Elaboration of a study for repairing the cable car from Popova Shapka to Tetovo and knocking down the 2 new illegal additionally built installations | |
| | C.3. Renovating inner roads inside Popova Shapka ski resort | |
| | C.4. putting up road and pedestrian signs all over the resort, indicating: - the location of the core resort and the accommodation facilities - the maps of ski slopes in winter, hiking trails in winter | |
| | C.5. constructing or reconstructing mountain roads leading to tourists attractions which are not connected to inhabited places | |
| | D- Developing nature summer activities in the Municipality of Tetovo | |
| | D.1. creating tracks in Popova Shapka for new winter sports activities, still little developed in Macedonia: snowshoes, Nordic ski, extreme ski sports | |
| | D.2. developing sites and facilities for practicing horse riding, parachuting and paragliding activities | |
| | D.3. mapping nature tourist tracks (hiking paths, bike tracks...) | |
| | D.4. creating a nature route in the municipality perimeter, including tourist tracks, newly created bird-watching spots, lake and other tourist spots | |

3.1.5.2. Actions to the product's implementation and success

| | | |
|------------|--|--|
| GOVERNANCE | G.I. Reinforcing a regional cooperation framework associating the municipalities of Shar regions and government representatives around urban planning, nature areas protection and nature tourism | |
|------------|--|--|

| | | |
|-----------------------------|---|--|
| | development issues | |
| | G.I.1. Elaboration of a General Urban Plan in consultation with the municipalities of the Shar region | |
| | G.I.2. development of protected area according to several categories of protection (project of creating a National Park in the pipeline) | |
| | G.I.3. elaboration of a plan for the construction of nature tourist tracks at the Sar region scale | |
| | G.II. Developing Popova Shapka as a cross-border resort | |
| | G.II.1. developing cross-border cooperation with Kosovo on road infrastructure (for the construction of a road between Prizren and Tetovo) | |
| | G.II.2. fining international funds for the reconstruction of the road linking Tetovo and Popova Shapka and inside Popova Shapka | |
| | G.III. Creating a Tourism Office (2 offices: 1 in Tetovo and 1 in Popova Shapka) as a promotion and attractiveness lever to tourists and private investors | |
| | CP.IV. Creating a national organization of mountain tourism promotion at national and international-regional level, presenting all mountain resources and facilities of Macedonia French example: http://www.france-montagnes.com/# | |
| MARKETING | M.I. Proposing organized winter and summer tourist products or individuals and groups through the Tourism offices | |
| | M.I.1. organization of nature guided tours and events in Popova Shapka for tourist individuals and families (to be bought at the Tourism Office) | |
| | M.I.2. selling some accommodation products (private apartments) and ski passes which can be directly bookable and buyable on the Tourism Office's website | |
| | M.I.3. elaboration of sports and leisure stays packages for regional tour operators | |
| | M.I.3.4. Selling specific spring, summer and winter packages to schools and holiday camps organizations | |
| | M.II. Erecting the hotel facilities as direct key marketing actors | |
| | M.II.1. possibility to book and buy stays on their official websites | |
| COMMUNICATION/ PROMOTION | CP.I. Developing interactive web communication tools transmitting an image of mountains and altitude, sports and events for young adults, families, and older peoples in search of nature | |
| | CP.I.1. Creating and designing an official website for Popova Shapka ski resort (in Macedonian, Albanese, Serbo-croatian (both alphabets)) | |
| | CP.I.2. Orientating the official website of the Municipality of Tetovo towards tourism issues, in particular Popova Shapka resort's value-added | |
| | CP.I.3. Designing a Shar region official tourism website, including a Popova Shapka description and link to official website (in Macedonian, Albanese, Serbo-croatian (both alphabets)) | |
| | CP.II. Developing media communication on mountain tourism | |
| | CP.II.1. Mobilizing newspapers, radios and TV (national and regional (neighbouring countries)) on organized events | |
| | CP.II.2 Government financing of a national advertising TV spot on | |

| | | |
|--|--|--|
| | mountain tourism in general to be broadcasted on national and regional TVs (Albania, Kosovo, Serbia, Greece...). Adopting a music giving an impression of freedom and a very forceful slogan example: French Tv ad “La Montagne, ça vous gagne » (national spot with only music forceful images and slogan (rhyme), which has been broadcasted during more than 15 years on French Tv with new videos every 2 years) | |
| | CP.II.3. Designing a web site the newly created National organization of Mountain tourism promotion French example: http://www.france-montagnes.com/# | |

3.2. Transversal Actions

3.2.1. Transversal Action n°1 – Technical Assistance for Coordination and Implementation of the NSTD 2009-2013

| | | | |
|----------|--------------------------------------|--------|------|
| nature | Technical assistance – institutional | | |
| priority | 1 | Timing | 2011 |

Motivations and Objectives

- Being stated that the institutional stakeholders and authorities, at both national and local levels, do not yet hold the necessary expertise and have developed appropriate organisation for the launching of all defined products, it is first of all recommended to create an institution assisting all private and public stakeholders for the operational coordination and implementation of the action plan during the whole period of launching of the above defined products.
- In this approach, the organisation (National Agency for Tourism Development) will itself be assisted by a national and international technical assistance, the main objective of which will be the transfer of know how.

Main Targets

- assist Ministry and local stakeholders for implementation of revised NSTD action plan,
- ensure and real transfer of know how at all levels,
- ensure, afterwards, the transfer of know how and best practices, to other non pilot spots in each cluster.

Content

| Action | Description |
|--|--|
| 1. Creation of a National Agency for Tourism Development (NATD) that would to launch and monitor the effective implementation of actions, | |
| 1.1 expert Committee | 12 persons, in charge of definition and adjustment of the action of the NATD <ul style="list-style-type: none"> 4 representatives of national institutions 4 experts, universitaires, ... 4 representatives of private operators |
| 1.2 operational team | 4 persons, <ul style="list-style-type: none"> One « General Manager » in charge of animation of the expert committee and working closely with the technical assistance 2 project managers specifically dedicated to the clusters assistance, 1 project manager in charge of marketing, communication, sales, |
| 1.3 technical assistance | 2 long term technical assistants : <ul style="list-style-type: none"> Team leader, working in close relation with the Agency General Manager, in charge of products, 1 consultant in charge of marketing and communication, Short term expertises : <ul style="list-style-type: none"> 1 specialist for each cluster, 1 specialist on regional markets |
| 1.4 technical committee | One for each product involving, with frequent meetings : <ul style="list-style-type: none"> Representatives of the concerned municipality (3) Representatives of the private sector (3) Representatives of other spots of the same product (2) Representative of the Agency (1) Technical assistance TL, |
| 2. Preliminary actions of the Agency – to be rolled out by cluster | |
| 2.1 concept definition | Preliminary studies : <ul style="list-style-type: none"> Global concept definition (technical committee) Technical and economic feasibility studies in case of any needs (inhouse or international consultancy), Technical and operational planning of actions, |
| 2.2 Fam phase | Training of the Agency Team : <ul style="list-style-type: none"> Study tour toward 3 similar products, Training periods |
| 2.3 fundings | <ul style="list-style-type: none"> Estimation of precise costs and potential fundings, Fund raising assistance (to the clusters) |
| 3. Implementation | |
| Range of actions to be implemented | <ul style="list-style-type: none"> Networking of all actions Necessary land acquisition for public services, Communication and distribution plans, Seeking of regional, european operators, Local welcoming facilities and services organisation, Technical studies for equipments building, Event and animation plan, Organisation and implementation of necessary public and private institutions, |

| Action | Description |
|------------|--|
| | <ul style="list-style-type: none"> Creation of national marketing and communication material (internet, press mainly) Assistance for creation of local marketing and communication tools, in close collaboration with local private operators, |
| Monitoring | <p>Follow up :</p> <ul style="list-style-type: none"> of full implementation of the action plan, of the relevancy of the funding plan, sustainability of the development, of the effective results : implementation, nb of tourists and turnover, employment, economic impact, ... |

3.2.2. Transversal Action n°2 – Specific Hospitality Business Development Policy

| | | | |
|-----------------|---|---------------|-------------|
| Nature | Cluster strategy definition and support actions | | |
| Priority | 1 | Timing | 2011 - 2015 |

Motivations and objectives

Accommodation and complementary food and beverage activities are basic services of the tourism business. Comfort and level of services are moving today in Europe, in each kind of tourism business. Macedonia does not actually propose an appropriate range of these services. Quantitatively and qualitatively, the Macedonian offer is not sufficient to support a real and sustainable tourism growth, particularly to convince the major European tour operators to include Macedonia within their offer.

Ministry of Tourism must lead an active policy to attract international operators, investors and developers. That policy is made of different decisions and actions.

Main Objectives

- increase the level of hospitality business,
- attract international investors, operators,
- seduce major European tour operators,

Content

| Action | Description |
|--|---|
| 1. revising, updating fiscal and legal framework of investment | |
| 1.1. – benchmarking and recommendations | <ul style="list-style-type: none"> · Full legal study in comparable emerging destination and interviewing international investors, · Operational recommendations for legal, fiscal framework adaptation, · Recommendations for set up of fiscal advantages to be proposed, |
| 1.2 – revision of the legal framework | <ul style="list-style-type: none"> · Legal framework adaptation |
| 2. identifying physical opportunities within each cluster | |
| 2.1. – hospitality development plan | <p>National hospitality business development plan to be done :</p> <ul style="list-style-type: none"> · international study, · including tourism accommodations, business facilities · That study should provide detailed and operational recommendations about : number of beds to be built during the coming 10 years, for each geographical area, each cluster, identifying the level of comfort, |
| 2.2 - identification of physical opportunities | <p>identification, in each area,</p> <ul style="list-style-type: none"> · based on existing facilities to be renewed : of the best land opportunities for creation of accommodations : former hotels, tourism “motels”, · base on ad hoc creation of facilities : opportunities of areas that |

| Action | Description |
|---|--|
| | <p>could be developed without major constraints (urban or legal constraints),</p> <ul style="list-style-type: none"> · definition of priority areas to be developed, |
| 2.3 – land acquisition | <ul style="list-style-type: none"> · in case of remarkable opportunity, public acquisition of land to be developed, |
| 3. search for national and international investors, operators and developers | |
| 3.1 – projects development programs | <p>For each priority area,</p> <ul style="list-style-type: none"> · definition of an intentional programme to be implemented on the basis of quantitative and qualitative recommendation of previous implemented study (see 2.1.), · identification of public services to be provided, developed, |
| 3.2 – presentation files elaboration, | <p>For each area elaboration of a presentation file presenting :</p> <ul style="list-style-type: none"> · available land, · expected facilities (wishes of the Ministry, Municipalities, see 2.1 – 3.1) · tourist statistics and forecast, tourism development plan and promotion plan for Macedonia, · urban and architectural constraints, · financial expectations, · maps, photos, · inventory of tourism environment : remarkable tourism, heritage, cultural sites, <p>Those files must be :</p> <ul style="list-style-type: none"> · detailed, precise, of a good quality (not luxury !), in English, · both printed and online, |
| 3.3 – contact with investors / operators, | <ul style="list-style-type: none"> · identification of potential regional, European and other international operators, investors, specialised hospitality business European consultants, · phone contact and sending of the presentation file to a short list of around a hundred investors with, for each of them, 2 or 3 files (max) promoting relevant areas for them, · invitation to visit the site (individual visit) · participation to workshops and international fares, |
| 3.4 – negotiation and concession | <p>For each interested potential partner negotiation :</p> <ul style="list-style-type: none"> · for financial conditions, including necessary fiscal advantages, public investments (accesses, transportation facilities, leisure equipments, tourist information services, ...) · for the nature, architectural approach, ... of equipments to be built, |
| 3. Attracting major European Tour Operators | |
| 3.1 – projects development programs | <p>For each priority area,</p> <ul style="list-style-type: none"> · definition of an intentional programme to be implemented on the basis of quantitative and qualitative recommendation of previous implemented study (see 2.1.), · identification of public services to be provided, developed, |
| 3.2 – presentation files elaboration, | <p>For each area elaboration of a presentation file presenting :</p> <ul style="list-style-type: none"> · available land, · expected facilities (wishes of the Ministry, Municipalities, see 2.1 – 3.1) |

| Action | Description |
|---|---|
| | <ul style="list-style-type: none"> · tourist statistics and forecast, tourism development plan and promotion plan for Macedonia, · urban and architectural constraints, · financial expectations, · maps, photos, · inventory of tourism environment : remarkable tourism, heritage, cultural sites, <p>Those files must be :</p> <ul style="list-style-type: none"> · detailed, precise, of a good quality (not luxury !), in English, · both printed and online, |
| 3.3 – contact with investors / operators, | <ul style="list-style-type: none"> · identification of potential regional, European and other international operators, investors, specialised hospitality business European consultants, · phone contact and sending of the presentation file to a short list of around a hundred investors with, for each of them, 2 or 3 files (max) promoting relevant areas for them, · invitation to visit the site (individual visit) · participation to workshops and international fares, |
| 3.4 – negotiation and concession | <p>For each interested potential partner negotiation :</p> <ul style="list-style-type: none"> · for financial conditions, including necessary fiscal advantages, public investments (accesses, transportation facilities, leisure equipments, tourist information services, ...) · for the nature, architectural approach, ... of equipments to be built, etc. |

3.2.3. Transversal Action n°3 – Marketing and Promotion

| | | | |
|-----------------|---|---------------|-------------------|
| Nature | National Marketing and Promotion Actions and Support to Local Cluster Actions | | |
| Priority | 1 | Timing | 2011-2012 and ... |

Motivations and objectives

The diversity of tourist products, heritage and cultural sites, and the diversity of tourist clienteles, make a Marketing and Promotion policy complex. To be efficient, the Marketing and Promotion actions have to be precise and finely targeted. The new means provided by information and communication technologies make a more targeted marketing and promotion policy more relevant, efficient, and economically sustainable.

Nevertheless, as a consequence of the World Wide Web Era, and low cost air transport development, one can observe:

- a diminution of the number of intermediaries, rendering the contact between the local tourist operators easier,
- a dilution of the offers, all destinations, whether the confirmed ones or new emerging ones, being able to communicate, giving a direct message,

➔ It is today necessary to develop a positive and attractive (innovative) image of the Macedonian destination to make it singular and unique.

2 main missions are to be considered:

1. Develop and install a Macedonian brand, positive and attractive, kind of a label for all tourist products (clusters) in Macedonia. Promoting the Macedonia brand means :
 - make the **Macedonia name** (well) **known**,
 - make the **Republic of Macedonia an identified geographical area** : a small and independent country, in the south of Balkan area, with plains, mountains and lakes, with identified tourist clusters,
 - give a **positive image of Macedonia** : attractive, image of a pleasant country, preserved, welcoming, with multiple potential tourisms, activities, level of accommodations, etc.
2. Help each cluster, associating all stakeholders, in promoting itself.

The National Agency for Promotion and Support of Tourism is to carry out those missions, but on the basis of a significantly increased budget. In northern Europe, the example of the French national tourism promotion organization “Maison de la France” could be relevant.

Main objectives

- create a positive and attractive Macedonian Brand,
- support clusters, local tourism stakeholders in developing their own promotion and communication policy within the framework of the national strategy,

Content

Note :

The trend, in terms of communication, is clearly a decrease of fares and brochures replaced by press relations, Internet communication (direct marketing for instance), public relations, and events. Those medias are today much more economically profitable and in line with sustainable tourism development principles.

| Action | Description |
|---|--|
| 1. Creating a positive and attractive image of the Macedonia brand | |
| 1.1 – renewed marketing and promotion strategy | <p>Definition of an updated marketing and promotion strategy and action plan distinguishing :</p> <ul style="list-style-type: none"> · global policy for promotion of the Macedonia brand, declined for each segment of clientele · description of actions to be implemented toward the priority medias : <ul style="list-style-type: none"> · specific internet policy, · specific national events plan (culture, sports, ...), · press relations (written, television), · direct contacts with tour operators, flight operators, tourist guides, · paying or free publicity campaigns in press (targeted magazines), <p><i>Fares and paper brochures are today considered like too expensive regarding the benefits.</i></p> |
| 2. Support to clusters' communication policy | |
| 2.1 – technical assistance | <ul style="list-style-type: none"> · in definition of specific marketing and promotion policies (by cluster) · in developing internet sites, databases, ... · in editing other promotional materials, · in organising press Fam Trips, |
| 2.2 – coordination assistance | <p>Ensure a coherent image, of the whole Macedonia destination coordinating, encouraging networking toward :</p> <ul style="list-style-type: none"> · each cluster, · each category of tourist operators (private and public) · each municipality within each cluster |
| 2.3 – financial assistance | <ul style="list-style-type: none"> · participating, eventually organizing Macedonian presence in a few specialised fares · |
| 3. Implementation, evolution of the Communication and promotion action plan | |
| 3.1 –definition, validation | <ul style="list-style-type: none"> · Submission of the strategic and operational marketing plan to the whole range of tourist stakeholders (private operators, municipalities, ministry) during workshops, · Adjustment of the plan and estimation of the needed budget : <ul style="list-style-type: none"> ○ Organisation, human means, training, ○ Promotion budget · Submission to the Ministry of tourism and to the government for validation (the plan must be on a 3 years period, yearly revised) |

| Action | Description |
|----------------|--|
| 3.2 – revision | <ul style="list-style-type: none"> · Annual assessment of the promotion campaign : <ul style="list-style-type: none"> ○ Implemented actions, ○ Budget assessment, ○ Qualitative impact, ○ Conclusions · Proposal of a revised action plan for the coming year |

3.2.4. Transversal Action n°4 – Quality Process Definition and Implementation

| | | | |
|-----------------|--|---------------|-------------|
| Nature | Definition and set up of a quality chart | | |
| Priority | 1 | Timing | 2012 - 2013 |

Motivations and objectives

The tourism offer in Macedonia is today globally not in line with European standards. It is often old and needs to be renewed, or rebuilt. It has not yet integrated the significant evolutions of tourism standards the new technologies or sustainable development principles brought.

That weakness affects mainly the opportunity to target European and other International clientele. It is a priority to define a quality chart for the whole tourism offer: accommodation, catering, leisure, rental services, transportation, etc.

That chart has to take in account the current level of the Macedonian offer and be based on a progressive approach, rather than a vain will of excellency, in order to attract a major part of operators. In a second step, standards would be increased to reach, years after years, the international standards.

Main objectives

- Raise the whole Macedonian tourism offer to the European standards,
- Integrate in the quality chart the range of services linked to the new technologies, to the sustainable development main principles,

Content

| Action | Description |
|--|---|
| 1. Definition of the basic quality chart | |
| 1.1 – set up of managing structure | <ul style="list-style-type: none"> · Creation, by the government, of a “tourism offer qualification committee”. That committee, 40 to 50 persons, should be composed of : <ul style="list-style-type: none"> · Members of the administration (1/4), · Members of Municipalities (1/4) · Representatives of private sector (1/2) · That Committee will design clusters commissions (that could be assisted by technical experts) for the main categories of tourist services : <ul style="list-style-type: none"> · Accommodations, · F&B business, · Welcoming services, · Leisure and sport activities, |

| Action | Description |
|---|---|
| | <ul style="list-style-type: none"> Guides, Transportation, renting, Nomination, in each commission, of a 'controller' who will implement the test period (1.2), potentially in cooperation with an international technical assistance. |
| 1.2 – definition of an evolutive quality chart and testing period | <ul style="list-style-type: none"> Each Commission will propose an evaluation grid for its category based on existing quality standards in Macedonia and existing models (existing labels or existing quality policies in Greece, Croatia, France, Italy). Those grids have to : <ul style="list-style-type: none"> distinguish the different ranges of services (4* hotel vs 2* for instance), define the minimum quality standards, level to get the "label", the optimum quality standards (international standards) to be reach, integrate the sustainable development principles, deal with the hardware as well as the quality of the provided services, Selection, within each category, of 20 operators that aim to obtain the "label" and test period. The panel of operators have to cover the whole range of development situation of standards for the existing equipments in Macedonian, not only the high quality standards equipments. Each pilot operator will, in collaboration with the 'controller', define an action plan to reach the minimum standards and implement it during the testing period (1 year) |
| 1.3 – adjustment, validation | <p>By the end of the test period</p> <ul style="list-style-type: none"> Assessment for each category and proposal of adjustment of the evaluation grid, definition of the quality process at a national level, Evolution plan Submission to and validation by both Commission and Ministry of Tourism Official launching of a tourism quality chart and process |
| 2. Implementation and evolution | |
| 2.1 – implementation | <ul style="list-style-type: none"> Nomination of a technical team in charge of the assistance to operators, control and attribution of the quality label, Per operator, a pre qualification process must be implemented, the whole qualification process last approximatively 6 months to 1 year, Monitors and Commission yearly adjust the objectives in term of number of operator involved in the quality process |
| 2.2 – annual evolution | <ul style="list-style-type: none"> The quality chart has to be revised, reinforced every 2 years during a 10 years period to reach the European standards, Every two years, proposal by the monitors, validation by both Commission and Ministry of Tourism, An objective of 30% of operators involved in the quality process has to be reached, |

3.2.5. Transversal Action n°5 – Human Resources and Training

Nature

Priority

1

Timing

2012-2015

Motivations and Objectives

In addition to the quality process to be implemented (transversal action n°4), Macedonia needs to set up a large program to upgrade its human resources in order to raise its tourism offer to the best level. This is a preliminary condition for Macedonia to be competitive, facing emerging tourism destinations that have already reached a fair tourism offer development.

Content

2 types of training have to be considered:

- Training stage : initial training (students), continuous training (for upgrade of professionals)
- Technical training : training for technical jobs (accommodation, F&B, etc., including management)

In priority, Macedonia needs to implement a program of upgrade of professional who operate today in the tourism sector, as a short term objective. As a more long term objective, Macedonia will seek for cooperation partners to launch an ambitious program to upgrade existing tourism training programmes and curricula to an “international” tourism university.

| Action | Description |
|--|---|
| 1. Evaluation of needs and training program definition | |
| 1.1 – evaluation of needs | <ul style="list-style-type: none"> · Implementation of a large and detailed inventory of needs all over the Macedonian territory and, in priority, in the pilot spots of above defined clusters, · That study must be processed by a Macedonian Team including international expertises, · It has to conclude on quantitative and qualitative needs, · That study has to be conducted, eventually monitored by the national representatives of private operators (Chambers) |
| 1.2 – elaboration of the training programs | <ul style="list-style-type: none"> · Full elaboration of an scheduled operational short term (3 years) training plan <p>Priority trainings :</p> <ul style="list-style-type: none"> · Technical jobs : <ul style="list-style-type: none"> · Accommodation : housekeeping, desk, maintenance, theoretical standards (hard, services), · F&B : cooking, service, · Leisure and culture: guides, animation, cultural mediation, heritage interpretation, ... |

| Action | Description |
|---|--|
| | <ul style="list-style-type: none"> Welcoming jobs : information and welcoming jobs (tourists offices), booking, incoming agencies, Internet : elaboration of internet sites, booking tools, Management <ul style="list-style-type: none"> Strategic and operational marketing, including promotion, competition studies, pricing management, ... Economic management, Human resources management, ... |
| 1.3 – operational implementation process definition | <ul style="list-style-type: none"> Training the trainers process, Macedonian trainers to be trained by a mix Macedonian/international team of trainers, Specific training program on a 3 years period, each training module to be implemented during several weeks, including if possible a training period in an international equipment (partnerships to be negotiated with international chains) |
| 2. Implementation of short term training program | |
| 2.1 – training the trainers program implementation | <ul style="list-style-type: none"> Recruitment of : <ul style="list-style-type: none"> The national team of trainers, The local trainees to become trainers, On a 6 months period, implementation of the training the trainers program To be initiated within the pilot spots areas, |
| 2.2 – objectives and implementation | <ul style="list-style-type: none"> 3 years period for a full implementation of the short term (upgrade) program, Program and study will pay attention to cover the whole Macedonian territory, and the whole range of tourism jobs, 80% of managers, 50% of employees will have to be trained at the end of the 3 years period (100% and 80% for the pilot spots) |
| 3. Feasibility and implementation of a high level tourism university | |
| 3.1 – elaboration of the technical feasibility | <ul style="list-style-type: none"> Specific feasibility (technical, economic) study for an ambitious program of national tourism university that have to be thought as an upgrade, evolution, networking of existing tourism universities, The study could include the full elaboration of files to seek international cooperation and fundings : <ul style="list-style-type: none"> Partnerships with international labels, chains, brands, European programs, Bilateral cooperation programs |
| 3.3 - launching | <ul style="list-style-type: none"> Objective 2015 |

3.2.6. Transversal Action n°6 – Tourism Observation

Nature Upgrade of tourism quantitative observation

Priority

1

Timing

2012

Motivations and objectives

A reliable and precise knowledge of tourism figures is necessary to define and implement efficient tourism marketing, promotion and development policies. Macedonia needs to have an autonomous tourism observatory that will provide the Ministry, the private and public operators and the potential partners (airlines, international hotel chains, etc.) the reliable data they need.

Contents

| Action | Description |
|--|--|
| 1 Set up of the National Tourism Observatory | |
| 1.1 – set up and financial means | <ul style="list-style-type: none"> · Launching of an operational dedicated structure under Ministry's authority (4 persons for launching), · Set up of a technical Committee including national representations of private operators, · Study Tour in 3 tourist developed destinations |
| 1.2 – yearly information to be provided | <ul style="list-style-type: none"> · Launching of an internet site, interactive, to publish : <ul style="list-style-type: none"> · monthly basic indicators · global inhouse implemented studies (ex : "international trends in the accommodation sectors", "tourism and new technologies", "tourism satellites accounts, economic impact", ...) · edition of a annual, and the semestrial information newsletter presenting the main tourism indicators, situating Macedonian in its competitive environment, main evolutions, ... presented indicators must be simple, operational, · that structure will have to work closely with representatives of the private sector (Chambers) and the tourism university, |

3.2.7. Tentative Schedule for Transversal Actions

[illegible]

Appendices

Appendix n°1: Descriptive and Quantitative Grids of Pilot Sites

1- DESCRIPTIVE AND QUANTITATIVE GRID – DOJRAN LAKE

| GENERAL DESCRIPTION AND ACESSES |
|---|
| <p>Spot's overall description</p> <p>Municipality of Dojran: created in 1996, deriving from the former Municipality of Gevgelija 3 426 inhabitants (2002). 13 administrative units:</p> <ul style="list-style-type: none"> - New Dojran (Novi Dojran, new settlement: 1 100 inhabitants - Old Dojran (Star Dojran, old settlement): 678 inhabitants - Stretenovo: not known (2002) - Furka: 570 inhabitants - Crnichani: 221 inhabitants - Nikolich: 541 inhabitants - Gjopcheli: 155 inhabitants - Kurtamzali: 121 inhabitants - Durutli: 16 inhabitants - Organgali: 21 inhabitants - Sevendekli: 3 inhabitants - Gumabos: 1 inhabitant - Chaushli: not known (2002) <p>+ 1 unpopulated area</p> <p>Dojran lake : surface area of 42,5 km², out of which 26;58 km² (62,54%) are located in Macedonia and 15,92 km² (37,46%) in Greece 9 km long at greatest length, 7 km wide at greatest width maximum depth: 10 meters 148 meters above sea level with its western shore ranging from 160-250 meters above sea level</p> |
| <p>Location and general access</p> <p>Distances from main cities:</p> <ul style="list-style-type: none"> - 81 km from Thessalonika, Greece - 170 km from Skopje - 34 km from Gevgelija - 59 km from Strumica <p>Distances from international and national transport infrastructures:</p> <ul style="list-style-type: none"> - nearest airport: Thessaloniki: 100 km (whereas Skopje airport: 141 km) - closest harbour: Thessaloniki: 81km - closest railway: Gevegelija: 38 km <p>Dojran is directly connected by regional road infrastructures;</p> <ul style="list-style-type: none"> - the regional road R-604 (Old Dojran-Strumica). This regional international road goes to Greece and travels through the municipality - the regional road R-110 (Udovo-Valandovo) - regional road R-111 crosses the municipaliy (Gevgelija-Bogdanci-Dojran) and connects to the E 75 highway Skopje-Thessalonika <p>No public transportation within the municipality of Dojran</p> |

Dojran's particularities and natural resources

- medical properties of lake flora (weeds growing on the lake, plankton on its surface, algae emitting iodine): suitable to balneal therapy, because helpful to treat rheumatism, skin and respiratory diseases
- very rich fauna: 15 types of fishes in the lake, 36 bird species, 26 distinctive fauna samples
- important areas of forest: 13 874 hectares within the municipality
- important agricultural lands areas: total of 1 940 ha agricultural land area, out of which 1696 are cultivated. 1 120 ha are state owned and the rest of 820 ha is in private ownership.

Dojran's specificities:

• fishing huts and boats

fishing boats and fishermen's huts standing on stilts above the surface of the water

Dojran is rich with original and very ancient methods: fishermen used birds (kormorans, gulls) to direct the fishes into the fishing baskets where they were gathered in enormous quantities. This method is very seldom; similar method a fishing exist only in distant China and is carried out during winter

•remains of ecological problem

A very serious ecological catastroph occurred in 1988, which had lowered enormously. Initially estimated of a 160 meters high above sea level, the lake is now 148 meters, which is still 12 meters under its initial level

Economic income

- fishing: first traditional economic resource. Still true but decreasing of fishing activities
- tourism: first income in the 1970's and 1980's. Very strong decrease during the 1990's because of the lake water level decreasing. Now slowly slightly increasing again.
- grapes growing and vineyards harvest
- fruit growing: grenade, olives, lemons, figs...
- agriculture

TOURIST, CULTURAL AND LEISURE FACILITIES

Tourist and cultural facilities inside spot

1 church: remains from the St Ilija church. Free entrance. No written interpretation support

1 monastery complex: Sv Partenij Zografski. Free entrance. No written interpretation support

2 archaeological sites:

- archaeological site of Toplec (ancient City of Taurian), New Dojran.
- archaeological site of the Monastery, New Dojran

Historic profane architecture monuments:

- remains from the traditional Turkish Bath, Old Dojran
- remains from "Sheova" water spring, Old Dojran
- remains from the Clock Tower, Old Dojran
- 2 early Christian basilicas I in Nikolic village, north of New and Star Dojran
- Roman bath. Location not communicated
- ancient graves, New Dojran
- marble plates, epitaphs, New Dojran

1 museum:

- Museum of Flora and Fauna of Dojran lake, in the hall of local government. Entrance: 1 euro. Opened 9 am-5 pm. Written interpretation supports.

1 House of culture, but mainly currently used for administrative needs. Cinema within the House not operating (old and damaged) nor its library

Leisure and tourist activities when in spot (if any)

Legally protected monuments of nature: Dojran lake

Proposed to be legally protected monuments of nature: Platani: (Sycamore trees)

15equipped beaches

Gambling facilities:

- Casino Dojran. Now free entrance
- hotel/casino "Hit International". Now free entrance

NB: the hotel/ casino "Atlantic" previously proposed casino service but has closed

NB: most casinos are located in Gevgelija

2 hunting grounds. Hunting activities managed by 2 associations:

- Dojran Hunting and Fishing association, with hunting grounds covering most of the municipal area (hunting ground "Karablija": 6 200 ha)
- Tiger Hunting Association of Stojakovo, with hunting grounds around the village of Crnichani (hunting ground Crnichani: 3 825 ha)

Neither of the 2 grounds has accommodation facilities for hunters

TOURIST SERVICES PROPOSED IN SPOT

Accommodation facilities

Overall available accommodation capacity of slightly over 3,500 beds, out of which:

- more than 56% are offered in registered private rooms
- less than 20% in hotels and motels. Out of this total some 11% belong to the so called "closed" or "special access" facilities: certain hotels operated "off shore" for the special purpose (casino) Greek visitors and the trade union rest houses belonging to a number of Macedonian enterprises.

Attendance:

In 2009, 28 2000 registered guests= 115 000 spent overnights

In 2010, 28 200 registered guests = 141 000 spent overnights

in 2004, overnights were only around 70 000

Most of the overnights were realized in private accommodation facilities, summer resting homes and hotels (figures not communicated)

If only "open access" accommodations are considered (3,134 beds), over a total opening period of 3 months (90 nights: July, August and several weekends), the available capacity in Dojran corresponded to 282,000 overnights, i.e. twice the volume of the effectively registered overnights in 2010.

Over 20 resorts with 1 500 beds located in Old Dojran (*source: Profile of the Municipality- Dojran Municipality-unknown year*)

4 3* star hotels, all of them being renewed:

- Casino-hotel Hit international: 132 beds, 1 restaurant. Internet access. Casino service
- hotel Casino Royal, indoor type, 54 beds
- hotel Polin: 88 beds, 1 restaurant. Internet access. Refurbished in 2005
- hotel Makedonija: 110 beds, 1 restaurant. Internet access. Spa service

| |
|--|
| <ul style="list-style-type: none"> - Hotel Prestigue: 80 beds. Works seasonally. <p>+ 1 currently closed hotel Galeb: 110 beds</p> <p>1 motel:</p> <ul style="list-style-type: none"> - motel "Istatov", New Dojran: 190 beds, 1 restaurant. Internet access. Sports and recreation centre with sports hall, playground, swimming pool, sauna and wightlifting room. <p>40 workers' rest houses in New Dojran: for vacation of the employees that own the facilities. Works in most of them. 4 out of work.</p> <p>Registered private accommodation: estimated 2000 beds, but important number of non registered accommodation facilities</p> <p>Estimated than more than 600 vacations and weekend houses, occupied by 2000 guest during summer</p> <p>+ 150-one-room apartments (into 2 complexes)</p> <p>5 existing private camp sites, out of which 3 are closed</p> <p>Located along the shoreline of Dojran lake. Opened only during summer months. Price: 5 euros per night and per person</p> <p>When opened, the 5 camp sites are around 1250 spaces, and 5000 beds. The biggest camping area (currently closed is "Achikot" (3000 caravans)</p> <p>The communicated camp sites opened during 2010 season are the following:</p> <ul style="list-style-type: none"> - Army of the Republic of Macedonia: 24 caravans - Partizan: 104 caravans |
| <p>Restaurants and catering trade facilities</p> <p>3 listed traditional restaurants:</p> <ul style="list-style-type: none"> - Dojrana restaurant: 45 tables, 200 seats. Opened all season, during all week - Kaldma restaurant: 43 tables, 180 seats Opened all season during all week. - Nota fish restaurant: 7 tables, 40 seats. Opened all season - Gradiko fish restaurant: capacities not communicated - Renesans fish restaurant: capacities not communicated <p>6 listed pizza restaurants:</p> <ul style="list-style-type: none"> - Pizza President - Vavilon - Reform - Luna - Boemi - Targer <p>"Fast-food" restaurants:</p> <ul style="list-style-type: none"> - "Fuk-tak" - many not categorized <p>3 listed cafes-bars:</p> <ul style="list-style-type: none"> - Dani-Ani - Chaa-promet - King |
| <p>Other tourist services</p> <p>1 Tourist Information Centre</p> <p>Created in 2006</p> <p>Between 3 and 5 employees during the summer period, 1 employee during winter season</p> <p>Located not far from the Town Hall ,in Old Dojran</p> <p>Provides general information about the municipality, accommodation, returns of tourists</p> <p>Events:</p> <ul style="list-style-type: none"> - traditional organization of cultural manifestations "Dojranski rakuvanja" 29th in order |

| LOCAL GOVERNANCE |
|---|
| Tourism income |
| In 2010, 25 000 euros collected from the tourist tax (22 000 euros in 2009), 80% of it goes to the Municipality |
| Involvement in cooperation projects |
| <p>In 2009 the Municipality applied for the IPA cross- border cooperation programme (CBC): there are c urrently 2 cross-bording projects with 2 Municipalities from Republic of Bulgaria:</p> <ul style="list-style-type: none"> - with the Municipality Kustendil(r.Bulgaria), work on a military museum project, i.e the Dojran front to be an open museum. It is projected with the same project a cleaning of the Dojran(Thessalonian)front and setting of exhibits. Total amount of project: 300,000 euro. Status: partner - with the municipality Nevestino, work on summer open scene project-construction for an amphitheatre.Total amount: 300,000 euro. Status: leader <p>- Cross-border cooperation with Greece: project for tourist attraction with the Economic Chamber of Central Macedonia(Greece). Total amount of this project is 430,000 euro (Dojran Municipality-117,000euros; Greece-150,000 euro, local economic development Foundation-52,000 euro). Partner in this project: Local Economic Development Foundation-Gevgelija.</p> |
| Managed tourism promotion actions |
| <p>Annual budget for tourist promotion: 15 000 euros. Used in:</p> <ul style="list-style-type: none"> - promotion of cultural and sports events - production of leaflets for tourism information of visitors already present in Dojran - production of postcards |

2. DESCRIPTIVE AND QUANTITATIVE GRID – WINE TOURISM – TIKVES REGION

GENERAL DESCRIPTION AND ACCESSES

Spot's overall description

Kavadarci: 40 settlements, 38 391 inhabitants (2002). Along with the neighbouring villages of Konopiste and Rosoman, it is the main centre of wine production in Macedonia. Wine industry employs 85% of the population of Kavadarci

Negotino: 18 settlements, 19 212 inhabitants (2002)

Demir Kapija: 15 settlements, 4 545 inhabitants (2002)

Rosoman; 27 settlements, 4 141 inhabitants (2002)

The municipality of Gradsko shelters the archaeological site of Stobi.

Location and general access

Negotino is located on the E 75/ M-1 highway, at 95 km in the South of Skopje

Demir Kapija is located very near the southern end of the E 75/ M-1 highway

Kavadarci is located at 11km in the South West of Negotino

Stobi archeological site (Municipality of Gradsko) is located at around 20 km from Negotino on the North, on the E 75/ M-1 highway

The regional road R- 108 (Prilep-Kavadarci-Negotino-Radovis) crosses the Tikves region from West to Northeast.

The region is also reachable though the railroad Skopje Thessalonica

Economic income

-grapes growing and high-quality wines making

- "rakias-brandy" producing

- agricultural and fruit product growing: barley, maize, wheat, sesame, poppy, tobacco, cotton, fig

- tourism: very little developed. In 2005, the Municipality of Kavadarci has welcome only 2274 tourists, and the Municipality of Negotino only 1488.

TOURIST, CULTURAL AND LEISURE FACILITIES

Tourist and cultural facilities inside spot

Religious heritage facilities

11 churches: all with free entrance. Entrance possible between 8 am to 6pm. No interpretation supports inside. No inclusion in guided tours

3 monasteries: No interpretation supports inside. No inclusion in guided tours

- Monastery of St George (Negotino, locality of Crkvishte) : with accommodation

- Moklishki; with accommodation (renovated "konaks")

- Polog Monastery: no accommodation

4 mosques: all with free entrance. Entrance possible between 8 am to 6pm. No interpretation supports inside.

1 memorial grave: from WW2, in Vatasha

Archaeological spots 20:

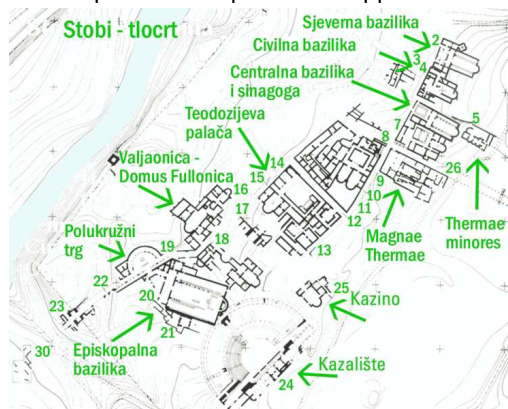
Stobi archaeological site (Municipality of Gradsko):
entrance 200 MKD

Some written interpretation cartels

A custos/archaeologist guide is present on the site and can
Manage guided visits

Excavations still in process since 1924 (1924-1940;
1970- present)

Tourist pavilion Stovi at the entrance



Stobi excavations plan- credits: Wikipedia.org

Other archaeological spots directly included in landscape, with no interpretation supports

- in Kavadarci: Chakovec, Eudarist, Gradishte, Neolit sites, early Christian basilica
- in Negotino: Antigonea, Gorni Disan, Gradot, Pre-Roman Necropolises, Holy Roman sites, Barovo, Vesje and Pirava Roman graves, late ancient Fortress:
- in Demir Kapija: Gradina, Budi Chiflik, Markov Grad- Kula (mediaeval city), Kale-Strezov Grad (Mediaeval city)

Historic profane architecture: 7

- in Kavadarci: Marko's Tower, Tall Minaret, Turbe
- in Negotino: the Old City bazaar, Clock Tower, Bezisten
- in Demir Kapija: Villa Maria precise history (9 am- 5 pm)

Museum, galleries and exhibition spaces: 10

Facilities related to wine (out of wineries):

- "Museum of the Wine": annex to the Museum of Negotino built with the help of an Italian donation by the Municipality of Negotino in cooperation with Tikves Wine Route Foundation. Still in the phase of completion, not opened to visit yet (in 2010)
- Gallery of the Wine in the Monastery of St George, Negotino

Leisure and tourist activities when in spot (if any)

Legally Protected monuments of nature:

In Kavadarci

- Tikves lake
- Tumba: category distinct plant and animal species outside the natural reserves
- Golem Kozjak: , 115 m deep pit
- Menkova Livada, category distinct plant and animal species outside the natural reserves
- Drenocka Gorge
- Kalnica: muddy area
- Konopiste: natural earthen pillars

In Demir Kapija: Bela Voda cave

Proposed to be legally protected monuments of nature:

- Mesnik
- Aramiska Cave
- Galiska Cave
- Cave Crkvice
- Cave church St Marko: church inside the cave
- Lukar – place used for water supply of Kavadarci
- Alsar - category distinct plant and animal species outside the natural reserves

Leisure and sports activities:

Wineries

80 wineries in Tikves region

about 20 wineries and wine producers visiting

Beaches on Tikves lake (not equipped)

5 hunting grounds (28 hectares in total)

1 Hunting Association in Negotino ("Vardar")

Association for fishing "Bosavica". No tourist activities proposed

1 closed Sports Hall complex in Negotino ("SRC Mladost")

Mention is also made of 1 leisure activities project at the very south of the region, at the Greek border, Ski Kozuf Centre. Development plan drawn www.skikozuf.com.mk

Still inaccessible

Initially 16 km of groomed ski trails, new installation of snow-making system on 1 ski trail, 20 km of free ride slopes (for snowboarders and free riders), 1 chair lift and 2 drag lifts, 2 restaurants, 120 beds.

No summer activities organized

TOURIST SERVICES PROPOSED IN SPOT

Accommodation facilities

About **700 private apartments** in all Tikves region, especially around Tikves Lake

3 three-stars hotels:

- Kavadarci Balkan hotel, Kavadarci: 65 beds, 2 restaurants, Internet access. Opened all season
- Feni Hotel, Kavadarci: 160 beds, 3 restaurants, Internet access, 1 room for business purposes. Opened all season
- Hotel Park, Negotino: 150 beds, 2 restaurants, Internet access, 3 rooms for business purposes. Opened all season

2 motels:

- Motel Tikves, Kavadarci: how many beds, rooms, restaurant, internet access etc....
- Hotel Havana, Negotino: 25 beds (11 rooms and 2 suites)(Total 25 beds). Not categorized. Offers BB (Bed and breakfast). The complex possesses a petrol station, a modern swimming pool. Restaurant hall with a capacity of 500 people, an internet café, a summer terrace .Own parking lot provided with up-to-date devices for observation.

Only 1 accommodation place reported in wineries: Popova Kula, Demir Kapija: 12 rooms, 24 bed
Accommodation place is being built in Bovin Winery in Negotino: 7 apartments. Opening planned in 2012
There is no other winery with accommodation in the region

Restaurants and catering trade facilities

3 traditional restaurants

- Brioni restaurant, Kavadarci: opened all week, during all season
- Rubiko restaurant, Negotino: 60 tables, 190 seats. Opened all week, during all seasons. Occasional live music
- Cardak restaurant, Negotino: 18 tables, 93 seats. International restaurants and Macedonian cuisine. Opened all week, during all seasons. No opened terrace for summertime. Organizes live music

•2 pizza restaurants:

- Dragi restaurant, Negotino: 270 seats, 50 tables. Opened all season, all week
- pizza restaurant EMA in Negotino

A number of other restaurants, private and not categorized: fast food, kebab, self-service, dairy. In general opened all week, during all season;

Other tourist services

Project for the creation of a Tourist Information Centre in Negotino

Renovation of Zelvova Kula building in Negotino, financed by the European Union, in order to install a multifunctional tourist information centre. Currently not opened

Cultural manifestations and events:

Wine festival

- Tikveshi Grozdober- Tikves grape picking, Kavadarci: annual (6-9 September)

Religious and wine celebrations:

- Celebrations of St Tripun, Kavadarci and Negotino: annual (February 7-14). The manifestation has grown into a trade tourist manifestation under the motto "The week of the Wine". The central celebration is held on the City square.
- Mala Bogorodica Fair in Negotino: ("Little Mother of God" in the streets and on the square of town: annual: September 21-23
- "Monastery Night" in the Monastery of St George, Negotino: annual: September 20

Historic feast:

- Commemorating the liberation of Kavadarci
- Day of the Liberation of the town: November 8th

No crafts nor souvenirs shops

No bike rentals

LOCAL GOVERNANCE

Description of local actors

Municipalities

Tikves Wine Route Foundation seems to be the only organization working on the development and the promotion of the Tikves Wine heritage and tourism resources
private stakeholders

3. DESCRIPTIVE AND QUANTITATIVE GRID – CULTURAL TOURISM/OHRID

| GENERAL DESCRIPTION AND ACCESSES |
|--|
| <p>Spot's overall description</p> <p>City of Ohrid: about 42 000 inhabitants</p> <p>Municipality of Ohrid; 55 749 inhabitants, 29 settlements: Town of Ohrid, Vapila, Velgosti, Velestovo, Gorno Lakocerej, Dolno Konjsko, Dolno Lakocerej, Elcani, Zajov, Konjsko, Kosel, Kuratica, Lagadin, Leskoec, Livoista, Ljubanista, Openica, Orman, Pestani, Plakje, Podmolje, Pamce, Pasino, Pecica, Svinista, Sirula, Skrebatno, Trpajca, Cipokno. + locality St Naum (Monastery of St Naum)</p> <p>Ohrid Lake: one of the most ancient lakes in the world (with Baikal lake in Siberia and Titicaca lake in South America) surface: 349 km², of which 118,9 km² belongs to Albania. Altitude: 693 m. Maximum depth: 286 m, average depth: 146 m Maximum length: 30,8 km; maximum width: 14,8 km Surrounded by ranges of karstic mountains: Mokra: 1 589 m; Jablanica: 1945 m (Albanian side); Galicica: 2 255 m (Macedonian side)</p> <p>In 1979, the UNESCO Committee decided to inscribe the Ohrid Lake on the World Heritage List under natural criteria. In 1980, this inscription was extended to include the cultural and historical area, and cultural criteria were added.</p> |
| <p>Location and general access</p> <p>Ohrid international airport "St Paul the Apostle" (2nd Macedonian airport after Skopje) home to 9 Airline offices at the airport itself: JAT Airways, Malev, Austrian, German Wings, Helvetic, Adria, Alitalia and Czech Airlines Companies currently operating: MAT, Adria, Cyrus airlines Season flights to Zurich, Geneva, Amsterdam, Tel Aviv. No flight Skopje- Ohrid</p> <p>Around 170 km from Skopje by car (about 2h by car) through Tetovo, Gostivar and Kicevo (highway only between Skopje and Gostivar) Regional road E-65 (part of the M-4 international road linking Gostivar to Ohrid, and Ohrid to Bitola-Prilep)</p> |
| <p>Economic income</p> <p>Leading position in Macedonia regarding tourism:</p> <ul style="list-style-type: none"> - In 2005, the municipality of Ohrid has welcome 165 695 tourists and 904 396 overnights, whereas Skopje 111 700 = 32,5% of the total number of tourists in 2005. - In 2006, the turnover was of 167 934 tourist visitors (out of which 52 640 visitors) and 896 660 nights realized <p>production of fruits(fertile stems): Cherries - 15000, wild cherries - 2900, apricots - 2100, quince - 3300, apples - 100.000, plums - 35.000, peaches - 17.200, walnuts - 4.700</p> <p>Production of fruits for 2005 (total) - 3005 tons</p> <p>agricultural area - of the total in Macedonia, 5.52 % belongs to Ohrid-Prespa region</p> <p>growth of cattle - 107, sheep - 48 and pigs - 109 (in tons for the year 2005)</p> <p>growth of chicken - 117.6 (in tons for the year 2005)</p> <p>production of milk - 923 tons (2005)</p> <p>fishing - 250 tons (year 2005)</p> <p>Forests – NP "Galicica" – 14.458,60 ha (2003)</p> <p>Crafting: filigree, ohrid pearl manufacturing, wood carving, weaving (no exact numbers available)</p> |

TOURIST, CULTURAL AND LEISURE FACILITIES

Tourist and cultural facilities inside spot

Built on the site of the Antique city of Lychnidos (until 6th century). Now old urban city core protected by the UNESCO.

Cultural heritage spots:

20 churches:

- paying entrances: St Sofia (1,20 euros), St Clement (St Bogorodica Perivlepta) (1,50 euros), St John the Theologian- Kaneo (1,50 euros)
- free entrance: St Constantine and Helena, St Bogorodica Zahumska-Zaum; Mali Sveti Vraci, St Nicholas Bolnicki, St Bogorodica Bolnicka, St Simitry, St Bogorodica Celnica, the Holy Mother-Kamensko, St Erasmo, St Stefan, St Bogorodica Pestanska, St Spas (Leskoec), All Saints (Lesani), The Ascendance of the Holy Mother (Velesovo), St Gorgi (Godivje), St Nikola, St Gorgi

3 monasteries:

- St Naum. Entrance: 1,50 euros
- St Clement's monastery "St Panteljmon": the oldest Slav monastery. Resanctified in 2002. Free entrance
- St Petka. Free entrance
- Plaosnik. Free entrance

More than 800 Byzantine-style icons dating from the 11th to the end of the 14th century.

Remains of ancient temples and basilicas as well as numerous churches and chapels, built from the 9th to the 14th centuries:

- polyconched church is located north from the Monastery of St. Clement's compound
- 2 early Christian basilicas St. Panteleimon-the new church St. Kliment
- 1 early Christian basilica at St. Erazmo outside of the city towards Struga
- 1 early Christian basilica above the sports centre "Biljanini Springs" its called "Studencista"

2 mosques:

- Cross- Mosque ("Krst Djamija"). Hagi Turgut. so it is better to stay like this the name). Free entrance
- Zeynel Abiddin Pasa. Free entrance

1 teke: Zeynel Pasha Teke. Free entrance

1 urban Fortress: St Samuil's fortress (Hellenistic period)

More than 250 archaeological sites with material remains dating from between the Neolithic period and the late Middle Ages have been excavated since First World War (1917-18)

Many current archaeological excavations: for example near the cathedral church of St Sophia

Revealed archaeological spots:

Neolithic and eneolithic (early Stone Age) and traces of the material culture: 6000- 3000 years BC

- Dolno Trnovo in Ohrid and Zlastrana in the village of Gorno Sredorece (Debarca)
- Kutlina site in the village of Velmej (Debarca) that dates back to the Eneolithic period

Bronze Age:

- Lakoceresko Gradiste
- Koselsko Gradiste
- Tumba near the village of Svinista
- recently discovered lake-dwelling settlement "Ploca Micov Grad" located near Gradiste peninsula on the eastern shore of Lake Ohrid.

Iron age:

- village of Gorenci, around 9 km from Ohrid (Suva Cesma, Tri Celusti and Vrtulka)
- tombs were discovered in the necropolis "Trebenista" near village Gorenci.

Classical period:

- recent archeological examinations have shown that the line starting from St. Erasmus through Gabavci, Paterica and Kozluk to Koselska Reka was an urban entity. This entity in archaeology is known as "Hermeleia"
- the acropolis is located high in the hill of Gabavsko. Two necropolises from ancient times were discovered near Ohrid. One of them is located in Trebenisko Kale, and the other was discovered on the site Crvenica near Prentov Most. On the site near Crvenica, 143 tombs dating back to the Hellenic period and the early Middle Ages were found. One Macedonian crypt was found in the area of Varosh, the old part of Ohrid. On the locality Deboj, the central necropolis of Lychnidos and the medieval Ohrid were discovered. The Roman theatre is located in Varos (the old part of Ohrid).

4 museums :

- House fam. RobeVci. Entrance: 1 euro. Exhibition of ancient findings/work of the Ohrid Woodcarving School/ exponents of history, archaeology, ethnology
- House of Urania: 1 euroK. Artistic exhibition
- House of Grigor Prlicev. Free entrance. Historical museum – exhibition of his life work (poetry, books etc.)
- House of Hristo Uzunov. Free entrance. Exhibition named "Ohrid National Liberation Movement".
- Bay of Bones (Ecomuseum) Entrance: 1,50 euros. habitat on pillars (or pile dwelling) and the archeological site's name is "Micov Grad"

1 gallery:

- Gallery in church St Bogodoriga Perivlepta. Entrance: 1, 50 euro. Gallery of valuable icons (60 icons from 11.-19. Century). Together with the Russian and the Greek gallery of icons, they are one-of-a-kind in the world. Some of the icons travel the world on exhibitions.

Leisure and tourist activities when in spot (if any)

Located near **Galicica National Park (situated between Ohrid and Prespa Lakes)**

Legally protected monuments of nature:

- Platan- Cinar (1100 year old plane tree in the old part of the city)
- Ohrid Lake itself
- Makedonski Dab (Macedonian oak - in Galicica NP)

Proposed to be legally protected monuments of nature:

- Duvalo – only active volcano on the Balkans (small, emits sulphuric gasses and warm water)-located half kilometre above the village Kosel
- Osoj – southern side of the mountain Galicica near the village Ljubanista
- Studencista - Swamp area near the Hydro-biological Institute
- Ostrovo (island at Sv. Naum-the restaurant where we drank coffee)
- Pestera Samoska Dupka (cave Samotska Dupka)
- Pestera Jaorec (cave Jaorec)

1 cave visiting: Samotska Dupka. Free entrance. Mainly summer months People have to take permission from the National Park Galicica for the visit under the guidance of "mountain leaders" (specially trained staff for such activities), but Macedonian legislation still does not recognize them. Managed and controlled are the visits by the National Park.

12 equipped beaches

7 hiking paths

2 mountain biking trails "La route de la francophonie", and the other one is through the largest part of NP Galicica

1 paragliding area (from Galicica mountain-landing site at Ljubanista camping)

2 rowing. kayak facilities Rowing club "JUG", Kayak canoe club "Strmec", Sailing club "Bofor", Sailing club "Strmec"

1 fishing ground: "St Apostol Petar", Sport Fishing Association.

Development project in process for developing Galicica into a ski resort

1 sports centre: Bilijanini Izvori. 20 euro for one hour.

1 spa centre: Villa Sparadise. Opened all season. Prices from 25 euros per hour per person.

All of the 4 former casinos in Ohrid are now closed

Only **1 winery:** Slovin Tem-Hem. Individual visits, not included in any travel agency's offer.

1 hunting ground "Piton - Karaorman" - located near the village Novo Selo in Debarca

1 Diving club, located at the museum on water "Bay of the bones". They organize at the same spot the diving activities at the archaeological site in the water "Micov Grad"

TOURIST SERVICES PROPOSED IN SPOT

Accommodation facilities

Hotels:

33 categorized hotels:(figures from 2008)

1 5* hotel: hotel Gorica: 130 rooms. 260 beds, 2 restaurants, 1 conference hall, 2 seminar facilities, internet access, spa services

7 4* hotels

10 3* stars hotels

4 2* hotels

11 1* star hotels

Private accommodation:

- apartments: 72 = 202 beds
- rooms: 695 = 4349 beds
- houses: 66 = 168 beds

8 camping areas:

- Elesec
- Ljubanista
- St Naum
- Gradishte
- "Andon Dukov"
- "Partizan"
- "Izvidnicki"
- "AS" (but its located near Struga)

Restaurants and catering trade facilities

3 traditional Macedonian restaurants

4 international restaurants

3 pizza restaurants

4 fast-food restaurants
1 dairy restaurant
many other not registered

Other tourist services

No operating Tourist Information Centre in 2010

Annual musical events:

- Ohrid summer festival: July 12- August 20
- Ohrid Fest: August 26.-29. August (Folk night, Pop night, International night and Amateurs night)
- Kaneo Fest: July 24-25 July Pop music

Annual sports events:

- Swimming marathon during summer months

Annual music-ethno festivals:

- Balkan Folklore Festival

Souvenir shops
Bike rentals

LOCAL GOVERNANCE

Description of local actors

Municipality of Ohrid

Private stakeholders (among which the president of HOTAM)

Local development projects

Strategy for Local Sustainable Development – Agenda 21 for the Municipality of Ohrid, 2007

Support Programme for Development of Tourism of the Municipality of Ohrid, Sector for Local Development

Managed tourism promotion actions

In 2009

Map of City of Ohrid, 2000 copies
Tourist Guide for Ohrid, 3000 copies
Photo Brochures (Netherland, Turkish, Serbian, English, Italian and German Language) 10000 copies
Posters of Ohrid, 2000 copies
Multimedia CD, 5000 copies
Brochure Gallery of Icons – Ohrid ,2000 copies
Postcards – 5000 copies
Paper bags with the logo of the municipality, 1000 copies

In 2010

Map of City of Ohrid, 2000 copies
Tourist Guide for Ohrid, 7000 copies
Photo Brochures (Netherland, Turkish, Serbian, English, Italian and German Language) 10000 copies
Posters of Ohrid 2000 copies
Multimedia CD, 500 copies
Paper bags with the logo of the municipality 1000 copies

4. DESCRIPTIVE AND QUANTITATIVE GRID – RURAL TOURISM – REKA REGION

| GENERAL DESCRIPTION AND ACESSES |
|--|
| <p>Spot's overall description</p> <p>The perimeter of study includes 7 villages, all included in the Municipality of Mavrovo-Rostusa</p> <ul style="list-style-type: none"> - Mavrovi Anovi: number of inhabitants 167 - Leunovo: inhabitants 6 - Mavrovo: inhabitants 166 - Nikiforovo: inhabitants 10 - Galicnik: inhabitants 50 families - Jance: inhabitants 146 - Rostuse: inhabitants 919 |
| <p>Location and general access</p> <p>Mavrovo National Park is crossed from Southwest to Northeast by the regional road P -409 from Debar to Gostivar. It borders Jance, Rostuse and desserves the northwestern shore of Mavrovro lake The local road P- 414 goes through the diagonal area of study from Galicnik to Mavrovi Anovi on the western shore of the Mavrovo lake, and to Leunovo on the eastern shore.</p> |
| <p>Economic income</p> <p>Cattle breeding Cheese making Crafts: fresco-painters, wood carvers, mosaic-makers Construction: facadiers, builders (bricklayers), tile masters, mosaic makers in Western Europe Income from emigrated people</p> |
| TOURIST, CULTURAL AND LEISURE FACILITIES |
| <p>Tourist and cultural facilities inside spot</p> <p>Religious heritage facilities</p> <ul style="list-style-type: none"> - 7 churches with free entrance. No interpretation support. included in guides visits proposed by Macedonian/ foreign TO remark: the church of St Nikola in Mavrovo, in the waters of Mavrovo lake, in only accessible in summer months and by boat in winter. - 1 monastery: monastery of St Jovan Bigorski (near Rostuse). With written interpretation supports. Entrance: 1,50 euros. Opened daily 8am-6pm. Included in guides visits proposed by Macedonian/ foreign TO <p>Museums</p> <p>2 museums in Galicnik with free entrance: Galicnik museum in Villa "Dosta" and Gorgi Pulevski. Daily opening hours: 8 am-6pm. Included in guides visits proposed by macedonian/ foreign TO</p> <p>Historic profane architecture:</p> <p>7 villages with traditional architecture in the whole Reke region 1 dam bridge in Mavrovo: Elen Skok (towards the villages of Mogorce)</p> |
| <p>Leisure and tourist activities when in spot (if any)</p> <p>Mavrovo National Park (legally protected since 1949): 73 088 hectares Water spots: Mavrovo artificial lake, Radika river, Baric canyon, Glacial lakes Proposed to be legally protected monuments of nature: 10</p> <ul style="list-style-type: none"> - Tri Bari; swamp |

- Adzina Reka: river
- ,Borce
- Volkovija: village
- Dlaboka Reka: river
- Strezimir, Trebiska Rupa,
- Garska river
- Pestera Simka,
- Profjelski Waterfall
- Baric canyon – canyon
- Glacial lakes
- Duf waterfall

Karst fields and caves: 14

Only 1 cave visiting: “Sarkova dupka”, in Mavrovo village. Free entrance

Zare Lazarevski ski resort:

WINTER ACTIVITIES

Si slopes from 1125 to 1860 meters.

9 ski lifts and 3 chair lifts, with capacity of 11 100 persons per hour.

Private ownership

Opened from November 15 to April depending on snow level

Also nordic skiing trails: 30 km

Ski passes prices

- before end of January:

half day: 850 denars adult, 500 denars children

1- day pass: 1100 adults, 800 children

7-day ski pass: 6000 adult, 4400 children

- after end of January:

half day: 650 adult, 400 children

1-day ski pass: 900 adult, 600 children

7-day ski pass: 5400 adult, 3100 children

Season ski pass: 20 000 adult, 14 000 children

Evening ski pass: 650 adult, 550 children (unchanged after end of January)

Chair lift tickets: 300 denars before en of January, 250 after (either adults or children)

Ski renting prices: 200 denars a day

All trails under the chair lifts: light and sound devices: possible to ski between 7pm and 12am

SUMMER ACTIVITIES

400 km walking/trekking trails

Since 2010, **3 moutain bike tracks** traced by the Ski Centre in association with the Macedonian Bycycle Federation.

Starts and ends in front of the hotel Bistra and extends on the road following the Mavrovo Lake coast 34 km.long.

Trout fishing in Mavrovo lake or Radika river

Fishing season from February 1st till October 30

Fishing permit to buy at the ski centre or at Bistra hotel. Price: 4 euros/ day, 75 euros/ year

Hunting grounds

Organization of **kayaking activities** on Mavrovo lake or Radika river. Organized by the ski centre, on demand

Walking, trekking, paragliding, biking organized by private agencies

Beaches (mainly unequipped)

1 Sports centre in front of Bistra hotel

TOURIST SERVICES PROPOSED IN SPOT

Accommodation facilities

1 5* hotel:

- hotel Radika, Leunovo: 124 beds, 2 restaurants. Internet access, 3 business/ meeting rooms, 1 conference room. 1 spa service. One solarium, one playground and bicycle renting services

6 4* hotels, all in Mavrovo village:

- Hotel Bistra: 114 beds, 1 restaurant. Internet access in lobby but not in rooms. 2 business rooms. No spa centre but Jacuzzi baths in some rooms
- Hotel Srna: 60 beds, 1 restaurant. Internet access, 1 conference room. Bicycle renting services
- Hotel Lodge: 34 beds,, 1 restaurant. No internet access in rooms. 1 meeting/business room
- Hotel Sport: 64 beds, 1 restaurant. No internet access in rooms, 1 business/meeting room
- Mavrotel: 55 beds, 1 restaurant. No internet access in rooms. 1 business/meeting room
- Alpina hotel: 55 beds, 1 restaurant. Internet access, 2 seminar/business rooms.

2 3* hotels:

- Hotel Makpetrol, Mavrovi Anovi: 84 beds, 2 restaurants. Internet access. 1 room for conferences/seminars and celebrations.
- Hotel ESM, Mavrovi Anovi: 44 beds, 1 restaurant
- Hotel Tutto, Jance: 7 rooms, 21 beds. Internet access

1 2* hotel:

- Hotel Neda, Galicnik: 30 beds, 1 restaurant. Internet access

1 camping area "Krstovi": opened during summer months.

Accommodation in St Jovan Bigorski monastery: 100 beds

Many private not categorized accommodation (figure not known in this studied perimeter)

In Mavrovo National Park, estimated that around 1 000 secondary residences, among which 1/3 are rented (around 300 private accommodation houses, equivalent roughly to 3,000 potential tourist beds)

Restaurants and catering trade facilities

Restaurants inside hotels: traditional and continental food

No other restaurants out of hotels.

Other tourist services

1 Tourist Info Centre in Mavrovi Anovi, opened since May 2010

2 employees, employed by Mavrovo National Park

Roles:

- information to visitors
- promotion: :materials productions and distribution, participation to international fairs (in process, from 2011)
- in project: begin trainings of mountain tour guides (paid by the National Park) in association with the Italian NGO Ucodep (within international cooperation with Italy)

Development project: create a shop selling souvenirs, local products, equipment

Project of creating the House of National Park providing information and accommodation + 2 more information points/ centres

Events

Sports events:

- annual ski contests: Mavrovo Commemorative Contest in February, Snowboard EUROPA Cup, National and International Competitions in slalom and giant slalom, Humanitarian Competitions and events...
- Mavrovo biking tour (organized in cooperation with the Dutch Embassy)
- fly fishing championship during summer

Cultural events

- Snow Town: school exhibition (February 16-22)
- Basker Festival: street performance (January 28)

Customs and gastronomy events:

- Sheep and Goat Breeders' day: presentation of food, music contest (July 9-10)
- Galicnik traditional wedding: July 9-10

Bike rentals shops in Mavrovi Anovi, Lunovo, Mavrovo, and Nikiforovo;

Souvenir shops in Mavrovi Anovi, Leunovo, Mavrovo, Nikiforovo and Galicnik;

LOCAL GOVERNANCE

Description of local actors

Municipality of Mavrovo Rostuse

Mavrovo National Park

Private stakeholders

Involvement in projects

Management plan of Mavrovo National Park (in progress)

Managed tourism promotion actions

Brochure " The Beauties of the Municipality of Mavrovo and Rostuse" with short description of the municipality, natural, cultural and geographic characteristics (Macedonian Language)

Copies: 500 copies

Printed: 2009

Distributed in: public institutions, hotels, NGO's, Municipal Council etc

Brochure "Municipality of Mavrovo and Rostusha" (English Language)

Copies: 1000

Printed: 2010

Distributed in: public institutions, hotels, NGO's, Municipal Council etc

Info Mavrovo & Rostuse" – Municipal Newsletter

Copies: 500

Printed: 2009

Copies: 500

Printed: 2010

Distributed in: public institutions, hotels, NGO's, Municipal Council etc

5. DESCRIPTIVE AND QUANTITATIVE GRID – MOUNTAIN TOURISM & NATURE ACTIVITIES – SAR PLANINA

| GENERAL DESCRIPTION AND ACCESSES | |
|--|--|
| Spot's overall description | Municipality of Tetovo: 20 populated settlements, around 86 560 inhabitants (after the territorial administrative division of the Republic in 1996 and 2003), out of which 75,000 in the city of Tetovo. — |
| Location and general access | City of Tetovo: 42 km from Skopje, 24 km from Gostivar Good connection with Skopje airport (1-hour drive) and Ohrid airport (2 hour-drive) Popova Sapka : 18 km from Tetovo, 53 km from Skopje. Connected to Tetovo with a regional asphalt road passing through a height difference of 1400 m. Time of travel: 40 minutes Before also reachable by gondola cableway/lift/ rope railway with length of 7 km. (not in function for a longer period of time, due to the damage caused by the conflicts in 2001) |
| Economic income | —agriculture (quality vegetables) and production of dairy products: harvest of blueberries, fruits and crops —cattle farming and shepherding —business firms: Renova, Pofix, Nter Fantasy, Milka company, Ecolog, Munevere... —tourism: little developed. In 2005, the municipality of Tetovo has welcome 7400 tourists , whereas the Municipality of Ohrid 165 995 and the municipality of Skopje 111 700. However, from 2005 to 2009, the number of coming tourists has increased, and is in 2009 around 10 000 tourists |
| TOURIST, CULTURAL AND LEISURE FACILITIES | |
| Tourist and cultural facilities inside spot | |
| Cultural heritage spots: | <ul style="list-style-type: none"> - 10 churches with free entrance. With no interpretation support, except for the St Cyril and Methodius Church, in the old Town of Tetovo - 2 monasteries: Lesok monastery is in v.Lesok and st.Holly Mother monastery - 1 mosque: the Painted Pasha's mosque. Free entrance. Tetovo city - 1 tekke: Arabati Baba Tekke. Free entrance. Tetovo city - 3 memorial graves, graveyards. Menada archaic tomb is the one which generates major interest of tour operators. City of Tetovo |
| Archaeological spots: | <ul style="list-style-type: none"> - Isar (ancient) in Sipkovica - Gradiste (mediaeval) in v.Orase |
| Historical profane architecture: | <ul style="list-style-type: none"> - Kale Fortress, located above Tetovo (ruined through many conflicts). With written interpretation support. interest of travel agencies - Old Stone Bridge in Zelino village. No written interpretation support - Old House with European architecture - Halim Beg House in the City of Tetovo |
| Museums, galleries and cultural facilities | <ul style="list-style-type: none"> - 4 museums in Tetovo: National Museum, Museum of the Polog Fauna, Museum of the carpenter Gligor Kostovski, Memorial museum of KPM (mentioned in spot analysis) - 1 art gallery in Tetovo, built inside a former Turkish bath- Hammam - 1 cultural centre "Ilo Antevski- Smok" with library - Old library building (still town library) |

Popova Shapka ski resort

From 1780 to 2500 meters above sea level

6 ski-lifts with a length of 7,7 km and 3 chair lifts

Ski areas: 20 km, of which 3km are according to the FIST-it criteria. Total capacity of 8 000 skiers/per hour

Managed by the ELEM state company

2 football stadiums in Tetovo, 1 of them meets the standards of the UEFA-FIFA

Leisure and tourist activities when in spot (if any)

Legally protected monuments of nature:

- Platan, sycamore tree
- Recica

Proposed to be protected monuments of nature:

- Bogovinsko lake: lake in Sar Planina mountains
- Karanikolicko lake in Sar Planina mountains
- river Pena
- Crno Lake

Sports activities

Ski

Biking and hunting well developed (even though in the past 2 years hunting concessions have not been awarded to municipalities in the region)

Horse riding, bird watching, parachuting, paragliding: numerous possibilities, but still no fully developed tourism product for these types of activities

Hiking paths: 11. Opened during summer and autumn seasons

Mountain biking trail near hotel Slavija

Climbing trails (Luboten mountain club in Popova Shapka, Alpinism clubs Jelak and Teteks in Tetovo)

Paragliding areas

Hunting facilities: Ceripasina and Lesnica in PS

Fishing places: Livadicko lake, Crno lake, Belo lake

2 casinos in Tetovo:

- Casino EuroPlay. Electronic casino. Free entrance
- Grand Casino. Entrance: 10 euros

TOURIST SERVICES PROPOSED IN SPOT

Accommodation facilities

Around 600 beds in Sar Planina region, all located in the municipality of Tetovo

No 5* hotel

7 4* hotels:

Popova Shapka: 4

- hotel Teteks: 55 beds, 1 restaurant. No internet access, no business room
- hotel Jelak: 48 beds, 1 restaurant; No internet access. 1 business/meeting room
- hotel Granit: 40 beds, 1 restaurant. No internet access. 1 business/ meeting room.
- hotel Konak: 45 beds, 1 restaurant. No internet access. 1 business/ meeting room

Tetovo: 1

- hotel Emka: 84 bed, 1 restaurant. Internet access, 1 business/meeting room.

7 3* star hotels:

Popova Shapka: 3

- hotel Slavija: 120 beds, 1 restaurant. Internet access. 6 meeting/business rooms.
- Hotel Popova Shapka: 190 beds, 1 restaurant. Internet access. 1 business/meeting room
- Elektrodistribucija: 30 beds, 1 restaurant. No internet access.

Tetovo: 4

- hotel Liraku: 82 beds, 1 restaurant. Internet access. 1 business/ meeting room
- hotel Mobeland: 40 beds, 1 restaurant. No internet access
- Hotel Petrol-Kompani: 20 beds, 1 restaurant. Internet access. 3 meeting/ business rooms
- Aqua Park royal: 36 beds, 1 restaurant. Internet access. 2 meeting/ business rooms

2 2* hotels in Tetovo (any in Popova Shapka):

- hotel Tivoli: 54 beds, 1 restaurant. Internet access. 5 meeting/ business rooms
- hotel Bora: 40 beds, 1 restaurant. No internet access.

4 motels in Tetovo:

- motel Beva: 12 beds, 1 restaurant. Internet access. 4 meeting rooms
- motel Berlin: 22 beds, no Internet access
- motel Euro Petrol: 24 beds, no internet access
- motel Neptun: 18 beds, 1 restaurant. Internet access

1 accomodation place at St Naum Ohridki monastery (15-20 apartments,some business rooms)

Restaurants and catering trade facilities

- 42 restaurants in the Municipality of Tetovo, 3000 seats
- 50 fast food restaurants, with 500 seats
- 85 bars/tea bars, with 3000 seats

Popova Shapka:

- restaurants only in hotel
- many small private fast food restaurants not categorized

Tetovo:

- 3 national restaurants opened all season and everyday. Events some days during week
- 1 pizza restaurant opened all season every day
- 6 fast-food restaurants opened all season every day
- many dairy, self service and kebab restaurants not categorized

NB: as the registration of restaurants at local level is little developed, we could not obtain restaurants on other catering trade facilities

Other tourist services

Project for a national park creation

In Popova Shapka:

ski-school

hire of ski equipment

No souvenir shops (nor in Tetovo nor in Popova Shapka)

Bike rentals in Popova Shapka only

1 Tourist Information Centre in Tetovo. (indicated with roadsigns)

Events

Winter sports in Popova Shapka

–Sar Cup- annual (February 15-16). Sar Cup is included in the European Ski Association for the European Cup Competition

–Beka cup : winter months – changing date very year

Annual musical festivals in Tetovo:

–Choir festival: June

–Sharri Kendon: June 24-26

–Bletezat: children's music festival: Summer months

–Tetovo appels: childr en's music festival: May

Annual ethno festival in Tetovo:

–Tetovo Folk Filigrees: Ethno festival. September

Annual Poetry and Literature Festival in Tetovo:

–Ditet e Naimit (Poetry): October

–Book Fair: publishing festival: October

LOCAL GOVERNANCE

Description of local actors

Municipality of Tetovo

ELEM State Management (Popova Shapka ski resort)

Centre of Development of the Polog Mountain Region (located in the village of Dzepeiste)

Local development projects

Study for Tourism Development in the Sar Planina region (Ministry of Economy)

Appendix n°2: List of Stakeholders Met

Ministry of Economy of the Republic of Macedonia

Mr. Fatmir Besimi, Minister

Mr. Zoran Nikolovski, Head of Tourism Department

Mr. Shefket Hazari – Deputy Minister for Economics

Mr. Aleksandar Popovski, Head of European Integration Department, World Bank, Doing Business, IPA-SPO, EU Company Law

Agency for Promotion and Support of Tourism

Mr. Zoran Strezovski, Director

Macedonian Chamber of Tourism

Mrs. Marjana Todorova-Gjeorgjieva, Target Communications

Economic Chamber for Tourism of Macedonia (ECTM)

Mr. Emil Dimitrovski, President, manager of Atlas Travel Agency

Mr. Aleksandar Trajkovski, Vice-President, General Manager of Wip Hotel, Skopje

Mrs. Tatjana Perovic Mitrova, Secretary, general

Association of Hotels, Restaurants and Cafes in Macedonia (HOTAM)

Mr. Doncho Tanevski, President, Manager of Doncho hotel, Ohrid

Municipality of Dojran

Mr. Gligor Cabulev, Mayor of the Municipality

Other key tourism stakeholders in the Municipality

Municipality of Demir Kapija

Mr. Jordan Trajkov, Manager of Popova Kula Winery, Demir Kapija

Mr. Lazar Petrov, Wine Tourism Manager, Popova Kula Winery, Demir Kapija

Mr. Ljube Dosev, Tourism Manager, Villa Maria Winery, Demir Kapija

The “Villa Maria” Winery Senior Staff

Municipality of Negotino

Mr. Pane Trajkov, Mayor of the Municipality

Ivica Zlatkovik, Associate

Mr. Aleksandar Borgevski, dipl. Eng. Manager, Bovin Winery, Negotino

Employees at Monastery St George

Municipality of Rosoman

Mr. Stojance Lazov, Mayor of the Municipality

Municipality of Kavadarci

Mrs. Violeta Jankova, Executive Director for Tourism, Tikves Wine Route Foundation

Mrs. Divna Jordanovska, Executive Director for Wine, Tikves Wine Route Foundation

Mr. Todor Efremov, Head of Economic Development Department, Municipality of Kavadarci

Municipality of Ohrid

Mr. Aleksandar Petreski, Mayor of the Municipality of Ohrid

Mr. Petar Boev, Chief of Tourism

Mr. Goce Simonoski, Head of Sector for Tourism and Local Economic Development, Municipality of Ohrid

Mr. Srebre Smilevski, Manager of Restaurant Ostrovo, St Naum

Mr. Blagoja Risteski, Manager of the Ohrid Pearl Workshop, St Naum

Employees at hotel St Naum, St Naum

Municipality of Mavrovo-Rostusa

Mr. Mukrem Mehmedi, Mayor of the Municipality

Mr. Tefikoski Tefik, Hotel Tutto manager, Jance- Mavrovo Rostuse

Employee at the Tourist Information Centre of the Municipality of Rostuse

Municipality of Tetovo

Mr. Sadi Bexheti, Mayor of the Municipality

Mr. Albert Qazimi, Project Coordinator, Municipality of Tetovo

Mr. Faton Sherifi, receptionist, Hotel Slavia, Popova Shapka, Président de l'Alliance Française de Tetovo

Appendix n°2: List of Used Documentation Information Sources

WRITTEN MATERIAL

- “Horizons in time” – Municipality of Rosoman - *publication*, 2010 (Временски хоризонти) **ROSOMAN MUNICIPALITY**
- “Hiking into the Sharr mountains” – Municipality of Tetovo - *tourism guide*, Mathieu Sette, Chantal Sobrino Tafunell, 2009 **TETOVO MUNICIPALITY**
- “National Park Mavrovo” – NP Mavrovo, Tourist Info Point - *info guide* – Mavrovo, 2009 **MAVROVO NATIONAL PARK**
- “Tourist geography” – Institute for Tourism Research – *Students’ textbook*, PhD Naume Marinoski – Ohrid, 2001 (Туристичка Географија) **ALL REGIONS**
- “Selective forms of tourism” – Faculty of Tourism and Hospitality, PhD Naume Marinoski – *working material* – Ohrid, 2009 (Селективни видови туризам) **ALL REGIONS**
- “Macedonian tourism postcard” – Institute for Tourism and Hospitality, PhD Naume Marinoski – *tourism guide* – Ohrid, 1996 (Македонска туристичка разгледница) **ALL REGIONS**
- “Cultural and natural heritage of Debar and Reka region” – Ministry of Culture of Republic of Macedonia - *development publication*, Pasko Kuzman – Reka – Debar Region, 2009 (Културното и природното наследство во Дебар и Река) **REKA REGION**
- “Strategy for Rural Development” – Council of Municipality Mavrovo – Rostusa - *Strategy proposal*, 2010 (Стратегија за рурален развој) **MAVROVO – ROSTUSA REGION**
- “Spatial Plan of the Republic of Macedonia” – Ministry of Environment and Spatial Planinng - *legal document for development* – Official Journal of the Republic of Macedonia no. 4/96, 28/97, 53/01, 45/02, 2004 (Просторен план на Република на Македонија) **ALL REGIONS**
- “Municipality map of Tetovo” – Municipality of Tetovo - *tourism guide/map* – Tetovo, 2009 (Карта на град Тетово – улици, објекти, знаменитости) **TETOVO MUNICIPALITY**
- “Municipalities in the Republic of Macedonia” – Macedonia-Balkan Business Center - *promotional material* - PhD Nikola Panov, Donco Gerasimovski – Skopje, 2006 (Општините во Република Македонија) **ALL REGIONS**
- “National Strategy for Development of Tourism of the Republic of Macedonia (2008-2012) – Critical analysis” – Tourism Local Economic Development – *Strategy proposal*, Goce Simonovski – Head of Sector (Критички преглед на Стратегијата за развој на туризмот) **ALL REGIONS**
- “National Strategy for Tourism Development 2009 - 2013” – Government of the Republic of Macedonia – *legal document*, Jim Flaneri – Tourism Planner, 2009 (Национална стратегија за развој на туризмот 2009 – 2013) **ALL REGIONS**

- “Prices of Hotels in Mavrovo” – Mavrovo – Rostusa Municipality – *promotional material*, 2010 **MAVROVO – ROSTUSA MUNICIPALITY**
- “Report Tourism Climate Survey in Ohrid” – Project “Spirit of Ohrid” – Municipality Ohrid - *project document*, 2008
- “Cultural and Religious Tourism” – Daniela Trpcevska – *working material*, Skopje, 2009 (Културен и верски туризам) **ALL REGIONS**
- “Rural and Wine Tourism” – Daniela Trpcevska – *working material*, Skopje, 2009 (Рурален и вински туризам) **ALL REGIONS**
- “Spatial Plan of the Republic of Macedonia 2002 - 2020 – proposed plan” – Ministry of Environment and Spatial Planning – *proposed strategy*, 2002 (Просторен план на Република Македонија 2002-2020 - предлог план) **ALL REGIONS**
- “Strategy for Local Sustainable Development – Agenda 21 for the Municipality of Ohrid” – Municipality of Ohrid – *legal document* – Ohrid, 2007 (Стратегија за локален одржлив развој) **OHRID MUNICIPALITY**
- “Study for Development of Tourism in the Sar Planina Region” – Ministry of Economy – *project document* – EPI Centar International Grupation, 2009 (Студија за развој на туризмот во Шарпланинскиот регион) **SAR PLANINA REGION – TETOVO MUNICIPALITY**
- “Review of Categorization of Hotels” – State Statistical Office of Republic of Macedonia - *statistical review*, 2010 (Преглед на категоризирани хотели во Македонија) **ALL REGIONS**
- “Tourism in the Republic of Macedonia 2004-2008 Statistical review: Transport, Tourism and other services” – State Statistical Office of Republic of Macedonia – *statistical review*, Skopje 2009 (Туризмот во Република Македонија 2004-2008 Статистички преглед: Транспорт, Туризам и други услуги) **ALL REGIONS**
- “Tourism in the Republic of Macedonia September 2010” – State Statistical Office of Republic of Macedonia – *news release*, Skopje 2010 (Туризмот во Република Македонија Септември 2010) **ALL REGIONS**
- “Support Program for Development of Tourism of the Municipality of Ohrid” – Municipality Ohrid – *legal document*, Sector for Local Development – Ohrid, 2010 (Програма за поттикнување на развојот во туризмот) **OHRID MUNICIPALITY**
- “Detailed Information for Categorized Facilities” – Municipality of Ohrid – *statistical review*, Sector for Tourism and Local Development – Ohrid, 2009 (Детални информации за категоризирани објекти) **OHRID MUNICIPALITY**
- “Tourism trade 2008” – Municipality of Ohrid - *statistical review*, Sector for Tourism, State Statistical Office, 2008 (Туристички промет 2008) **OHRID MUNICIPALITY**
- “Register of Hotels 2008” – Municipality of Ohrid - *statistical review* - Ohrid, 2008 (Регистар на хотели) **OHRID MUNICIPALITY**

- “Development of Tourism and Organization of Tourism Regions” – Geographical Institute at Faculty of Natural Sciences and Mathematics – Skopje – *expert report*, Skopje 1998 (Развој на туризмот и организација на туристичките простори) **ALL REGIONS**
- “Draft Baseline Study for the Lake Ohrid Region – Tourism Development Initiative” – Lake Ohrid Tourism Development Initiative – *baseline study* – Ohrid, 2003 **OHRID MUNICIPALITY**
- “Spatial Plan of the Ohrid – Prespa Region 2005 – 2020” – Ministry of Environment and Spatial Planning – *draft document*, **Provided by Petar Boev** – Chief of Tourism at the Municipality of Ohrid – Skopje, 2007 (Просторен план за Охридско – Преспанскиот Регион) **OHRID MUNICIPALITY**

INTERNET SOURCES

- <http://www.economy.gov.mk/?ItemID=57FEBFA466A836459CA6D70827666F16>
- <http://www.stat.gov.mk/>
- <http://makedonija.name/municipalities>
- <http://www.statoids.com/umk.html>
- <http://www.crwflags.com/fotw/flags/mk-munic.html>
- <http://www.kralemarko.org.mk/>
- <http://www.hotam.org/projects.htm>
- <http://www.restaurants.com.mk/>
- http://www.visitohrid.org/j_mak/index.php?option=com_content&view=article&id=47&Itemid=59
- <http://www.ohrid.com.mk/makedonski/history/history.asp?ID=380>
- <http://www.ohrid.gov.mk/>
- <http://www.struga.gov.mk/>
- <http://www.tikves.com/>
- <http://vinarskavizbatikves.blog.mk/>
- <http://www.arbotravel.com/ponudi/vinari/vinarska-vizba-bovin.html>
- http://www.popovakula.com.mk/index.php?option=com_content&view=article&id=60&Itemid=78&lang=mk
- <http://ohridinfo.com/?kat=3>

- <http://www.metropol-ohrid.com/>
- http://inexgorica.com.mk/index.php?option=com_content&task=view&id=16&Itemid=47&lang=macedonian
- <http://www.kavadarci.gov.mk/>
- <http://www.opstinarosoman.gov.mk/>
- <http://www.negotino.gov.mk/>
- <http://www.galicica.org.mk/indexmak.htm>
- <http://www.npmavrovo.org.mk/>
- <http://www.mavrovoirostuse.gov.mk/>
- <http://www.bistra.com/>
- <http://www.falcon.com.mk/?izbor=mavrovoradika>
- <http://www.skimavrovo.com/>
- http://mk.wikipedia.org/wiki/%D0%9E%D0%BF%D1%88%D1%82%D0%B8%D0%BD%D0%B0_%D0%94%D0%BE%D1%98%D1%80%D0%B0%D0%BD
- <http://www.bogdanci.gov.mk/mak/index.asp>
- http://www.dojran-info.com/index.php?option=com_content&view=article&id=144:xxll-&Itemid=42&lang=mk
- <http://www.tetova.gov.mk/mk/t/83.html>
- <http://www.popova-sapka.mk/site/index.php>



Appendix n°3: Update of the Action Plan from the National Tourism Development Strategy 2009-2013

Situation as reported in December 2010

| Priority Timescale | Objective | Action | Rationale | Lead | Partners | Indicative Budget | Success Criteria |
|--------------------|---|---|---|--|--|--|--|
| | TOURISM PRODUCTS & SERVICES | | | | | | |
| 1 2009-2011 | Create iconic products <i>Kokino is internationally recognized, Markovi Kuli is in a process of recognition</i> | <ul style="list-style-type: none"> World Heritage Site for Markovi Kuli - Prilep and Cocev Kamen - Kratovo Pursue NASA claim on Kokino as a pre-historic observatory Mother Theresa House Reconstructed Green Tourism Destination/ Organic Food | International recognition will generate publicity and "must see" attractions. | Ministry of Economy Agency for Promotion and Support of Tourism | Ministry of Environment, Ministry of Agriculture NGOs | Euros 30,000 for web site and brochures Other actions conducted under existing Ministerial admin budg | Number of final products by 2011 |
| 1 2009 | Create general Tourism Products <i>Part of the activities are implemented, however there is still more to be done</i> | <ul style="list-style-type: none"> Signpost Scenic Routes to diversify tourists to off highway attractions Develop itineraries to achieve regional spread Develop list and promote activity products | Signposting routes off highway attractions could make tourists extend their stay and increase the number of visits to regional areas, thus increa | Agency for Promotion and Support of Tourism | Road Fund Rent-a-car agencies and gas stations Ministry of Transport | Euros 50,000 for 500 signs and Euros 20,000 for travel maps | Signposts, travel maps developed and distributed by mid 2009 |
| 1 2009 - 2011 | Increase the number of accommodation <i>Implemented- Princess Hotel (Ramada) in Gevgelia, Regency in Skopje, and negotiation for Marriott in Skopje.</i> | <ul style="list-style-type: none"> Quality Pension Style Hotels – Family operated, small, traditional Internationally recognized/ High Quality International Brands – Skopje Low-budget recognized Brand on Corridor X | Small- and medium-size companies and presence of international brands create higher confidence and attract more investors | Agency for Promotion and Support of Tourism Investment Agency | Ministry of Economy Private Sector | Euros 20,000 for Monastery brochure and marketing support Other actions are private sector funded | 5 new high-quality international hotels by 2011 |



| Priority Timescale | Objective | Action | Rationale | Lead | Partners | Indicative Budget | Success Criteria |
|--------------------|---|---|--|--|--|---|---|
| | A lot of private, family hotels are opened in Skopje and Ohrid | <ul style="list-style-type: none"> Monastery Accommodation – co-operate in marketing guide, brochure | | | | | |
| 1 2009-2011 | Accommodation Categorisation The Grey Market Accommodation is regulated, while the review criteria is in a process | <ul style="list-style-type: none"> Introduce annual fees to contribute to cost for regular assessments Review criteria and introduce subjective qualities – food, decor, service etc Regularise Grey Market accommodation | Number of non-standardized accommodations and evasion of tax payment | Ministry of Economy Municipalities | Ministry of Local Government | Euros 20,000 for a directory of registered accommodation | 50% increase in registered accommodation by 2011 |
| 1 2009 - 2011 | Tourist exploitation of National Parks Realized | <ul style="list-style-type: none"> National Park business plans More activity in parks to exploit their potential plus build two interpretation centres Improve Mountain Huts, children's and worker's accommodation | Improve the financial and environmental sustainability of national parks | National Parks Agency for Promotion and Support of Tourism | Ministry of Environment Ministry of Labour and Social Policy NGO's | Euros 200,000 for interpretation centres Euros 200,000 for 20 new huts Euros 100,000 for 30 improved huts | Plans complete and approved, interpretation centres and huts built/improved by end 2011 |
| 1 2009 - 2010 | Exploit Wine Tourism The planned activities are realized, however more should be done | <ul style="list-style-type: none"> Introduce as part of Rural Tourism Develop scenic itineraries, walking, rural accommodation and traditional cuisine Tikves Wine Route Foundation be assisted with signposting and marketing | Development and promotion of this type of tourism and its exploitation | Tikves Wine Route Foundation and Agency for Promotion and Support of Tourism | Ministries of Agriculture, Economy and Transport, Explore Macedonia.com, | Euros 100,000 for 200 signs Euros 20,000 for wine routes map | Sign posted routes and menu of tourist offers in place by end 2010 |
| 1 2009-2012 | Exploit Rural Tourism The EU funded IPARD Programme | <ul style="list-style-type: none"> Brajcino as extraordinary example of development challenges | Make use of this enormous potential as an alternative form of tourism | Municipalities and Agency for Promotion and Support | Ministry of Agriculture (especially in connection with | Euros 300,000 for 3 villages (to include web sites, maps, training and NGO | 3 additional villages marketing themselves as rural destinations |



| Priority Timescale | Objective | Action | Rationale | Lead | Partners | Indicative Budget | Success Criteria |
|--------------------|---|---|--|---|---|--|--|
| | is active, and there is an interest for this programme as well as for developing rural tourism | <ul style="list-style-type: none"> Pehcevo, Berovo, Kolesino, Bansko, Mokrino, Smolare, Vevcani, and Galichnik all have potential Municipalities, Agency for Promotion and Support of Tourism, NGOs support with joint development programs and promotions | | of Tourism | the introduction of the EU funded IPARD programme) NGO's | support) | |
| 1 2009 - 2010 | Exploit Culture and Handcrafts as tourist products An annual calendar and events have not been published. However the tour operators from Macedonia include some cultural events within their programs | <ul style="list-style-type: none"> Publish annual calendar and events Bring Tour Operators and cultural organisers together Grouping events and packaging Use crafts and culture in promotional activities | Low level of awareness of Macedonia's cultural appeal and attraction | Agency for Promotion and Support of Tourism | Ministry of Culture Ministry of Agriculture/IPARD Explore Macedonia.com | Euros 25,000 for a calendar or directory and website | Directory published in hard and web formats by end 2010 |
| 1 2009-2012 | Exploit Spa and Medical Tourism Most of the spas have been privatised and the conditions have been improved | <ul style="list-style-type: none"> Upgrade/renovate Convenient for local and regional markets <ul style="list-style-type: none"> Be health/wellness centres rather than just medical facilities Conduct market study to examine spa market needs and new niche medical sectors | The basic spa product is not competitive internationally. It is below standard for regional visitors and should upgrade and concentrate on this market | Spa proprietors and Agency for Promotion and Support of Tourism | Municipalities Ministry of Health Ministry of Economy | Euros 50,000 for market study to identify market needs/opportunities which will direct new investment Renovation funded by private sector | Four refurbished spa resorts with three star grading by 2012 |
| 1 | Exploit hunting tourism In a process | <ul style="list-style-type: none"> Stricter controls over illegal hunting Increase stock | Insufficient exploitation of this tourism potential | Ministry of Agriculture | Ministry of Economy | Euros 50,000 for marketing study | 50% increased stock by 2010 |



| Priority Timescale | Objective | Action | Rationale | Lead | Partners | Indicative Budget | Success Criteria |
|------------------------|--|---|--|---|--|--|---|
| 2009 - 2010 | | <ul style="list-style-type: none"> Targeted marketing and marketing study needed when stocks and controls in place | | Agency for Promotion and Support of Tourism | Municipalities State Forest Enterprise and Private Sector | | 50% increase in hunters by 2012 |
| 1 2009 | Conferences and Meetings Not realized | <ul style="list-style-type: none"> Produce comprehensive directory/brochure of conference facilities Commission study into potential national conference centre | EU accession activity generate meetings and opens up the European market as a source of international meetings | Agency for Promotion and Support of Tourism | Ministry of Economy Explore Macedonia.com | Euros 25,000 for directory/brochure and website Euros 50,000 for feasibility study | Directory in hard copy and on web by end 2009. Study complete by end 2010. |
| 2 2009 and on-going | Publicise monastery accommodation as a special feature of Macedonia Realized | Create a directory of monastery accommodation and promote to tour operators and public | Increase stays in rural locations and increase awareness of cultural appeal of Macedonia | Agency for Promotion and Support of Tourism | Macedonian Orthodox Church Explore Macedonia.com | Euros 25,000 for leaflet and website | Leaflet and web section in place by mid 2009 |
| 2 2009 and on-going | Preserve and promote traditional handicrafts Realized | Further develop National Handicraft Centres as workshops and retail outlets for traditional crafts | Increase visitor spend on quality souvenirs and conserve handicraft traditions | Ministry of Culture | Ministries of Economy Ministry of Agriculture/IPARD | Euros 20,000 for a Handicrafts Centre Euros 10,000 for organising a Handicraft Fair | Centre open by end 2010 |
| 2 2009 and on-going | Build awareness of the diversity of hiking opportunities in Macedonia Partly realized in some mountins | Create a directory – printed and on web – of the main hiking trails and day hikes, including accommodation and transport details and publicise | Provision of full details on hiking trails stimulates operators, clubs and individuals to come hiking | Agency for Promotion and Support of Tourism | Sports clubs, donors | Euros 30,000 for directory and website | Published trail directory and website section by 2010 |
| 2 2009-2011 | Provide unusual attractions in rural locations Ongoing | Develop show caves by provision of access and parking, designated walkways, thematic lighting, interpretation and | By developing quality attractions in rural areas that are non seasonal one can spread traffic | Speleological Association | Agency for Promotion and Support of Tourism Ministry of | Euros 30,000 for infrastructure provision and leaflet/map | 2 caves developed by end 2011 |



| Priority Timescale | Objective | Action | Rationale | Lead | Partners | Indicative Budget | Success Criteria |
|------------------------|--|---|--|-----------------------------------|---|---|---|
| | | guiding and promotional materials | and extend stays | | Environment | | |
| 2 2009 and on-going | Improve the hunting offer Realized | <ul style="list-style-type: none"> Enforce hunting controls more effectively Establish a game reproduction centre to re-stock hunting area Increase promotion of the hunting product | Hunting is a lucrative, off-season, self-sustainable tourism sector if managed effectively | Ministry of Agriculture and IPARD | Ministry of Economy, Agency for Promotion and Support of Tourism, Municipalities, landowners and Macedonia Forests PE | Euros 100,000 for a Reproduction Centre | Reproduction Centre established by end 2009 |

| ACCESS AND INFRASTRUCTURE | | | | | | | |
|---------------------------|--|--|--|-----------------------|----------------------|--|--|
| 1 2009-20010 | Air Access Realized | <ul style="list-style-type: none"> Pursue full implementation of European Community Aviation Area Agreement for III, IV and V Freedoms Provide conditions for low cost carriers | | | | | |
| 1 2009-2010 | Road Transport Not realized | <ul style="list-style-type: none"> Push for implementation of road improvements in the National Development Plan (NPD) Improve signposting Extend use of Brown Tourism signposting Develop criteria for using such signs | Good signage assists tourists see more attractions and routes, encourage longer stays and regional spread. | Ministry of Transport | Municipalities | Euros 50,000 for 500 signs | Signs for two themed routes in place and 500 brown signs by 2010 |
| 1 2009 | Visa and Immigration controls Realized | <ul style="list-style-type: none"> Allow EU citizens to enter on National Identity cards Remove visa requirement for citizens of Albania | Lack of entry restrictions encourages more travel | Ministry of Interior | Ministry of exterior | Actions conducted under existing Ministerial admin/other budgets | Increase in EU and Albanian tourists |



| | HUMAN RESOURCES | | | | | | |
|----------------|--|--|--|--|--|--|--|
| 1 2009 | Identify the future staff requirements of the tourism sector and their training needs Not realized | Undertake a Labour Force Survey to identify employment and training needs <ul style="list-style-type: none"> Tourism management training | No correlation currently between job requirements and provision of skilled staff | Agency for Promotion and Support of the Tourism, HRD Committee | Ministry of Economy, Ministry of Labour and Social Security | Euros 25,000 for Labour Force Survey | Survey completed by early 2009 |
| 1 2009-2011 | Improve hospitality and tourism education and training in the school system On going | <ul style="list-style-type: none"> Improve supply of training equipment in education Increase percentage of practical training hours Development of training programmes | Practical skills are required by employers | Ministry of Education | Agency for Promotion and Support of Tourism, HRD Committee and Austrian Development Agency Private Sector | Donor funded opportunity | Increased percentage employed by the industry |
| 2 2010-2013 | Improve industry and educational system liaison Not realized | Establish HRD Committee in Agency for Promotion and Support of the Tourism | More specific education to meet employer needs | Agency for Promotion and Support of Tourism | Ministry of Education and industry employer associations | Actions conducted under existing Ministerial admin/other budgets | Regular improvements in training and curricula |

| | ENVIRONMENT AND CULTURAL HERITAGE | | | | | | |
|------------------------|---|---|--|-------------------------|---|--|---|
| 1 2009 and on-going | Improve the general physical environment Partly realized | Introduce waste management operations and public awareness schemes | Overcome the present very negative image created by the litter problem | Ministry of Environment | Municipalities, local administrations, community groups and Agency for Promotion and Support of Tourism | Euros 50,000 contribution to a national awareness campaign | Waste management improvement evident by mid 2010 |
| 1 2009-2011 | Improve protection of natural heritage sites Realized in some parks | <ul style="list-style-type: none"> Prepare and implement management plans for all national parks and nature reserves including waste | These plans will improve solid waste and waste water management and help prevent fires | Ministry of Environment | Ministry of Agriculture Agency for Promotion and | Actions conducted under existing Ministerial admin/other budgets | Plans for national parks by end 2009, for nature reserves by 2010 |



| | | | | | | | |
|------------------------|--|---|--|-------------------------|--|--|---|
| | | management and fire protection <ul style="list-style-type: none"> ▪ Install litter disposal and designated fire / barbecue areas in nature reserves | | | Support of Tourism | | |
| 1 2009-2010 | Identify additional cultural heritage sites of tourist potential which needs protection <i>Realized</i> | <ul style="list-style-type: none"> • Create basic cultural heritage database | Under-exploitation of cultural heritage as tourism potential | Ministry of Culture | Ministry of Economy, Agency for Promotion and Support of Tourism | Actions conducted under existing Ministerial admin/other budgets | Creation of database by 2010 |
| 1 2009 - 2011 | Improve protection of existing cultural heritage sites <i>In a process</i> | <ul style="list-style-type: none"> • Prepare and implement Cultural Heritage Protection Plans against excessive tourism exploitation | These plans will improve the cultural heritage management against tourism exploitation | Ministry of Culture | Ministry of Economy, Agency for Promotion and Support of Tourism | Actions conducted under existing Ministerial admin/other budgets | Cultural Heritage Protection Plans by 2011 |
| 2 2009 and on-going | Visitor management in natural heritage sites through better information <i>Partly implemented</i> | For national parks and natural heritage sites: <ul style="list-style-type: none"> ▪ Provide reception facilities and / or information points ▪ Provide signage for trails, parking, picnicking and other recreational areas | Good information enhances visitor enjoyment and helps prevent undesirable activity | Ministry of Environment | Municipalities Agency for Promotion and Support of Tourism | Actions conducted under existing Ministerial admin/other budgets | Reception centres in all national parks by 2010 |
| 2 2009-2013 | Identify additional natural areas with tourism potential requiring protection <i>Not realized</i> | <ul style="list-style-type: none"> ▪ Municipalities and NGOs to identify additional natural sites requiring protection ▪ Ministry of Environment to consider appropriate protection measures | Formal protection may be required to secure areas from damaging development | Municipalities and NGOs | Ministry of Environment Agency for Promotion and Support of Tourism | Actions conducted under existing Ministerial admin/other budgets | Number of new natural heritage sites designated |



| | TOURISM MARKETING | | | | | | |
|------------------------|--|--|---|---|---|-----------------------------------|--|
| 1 2009 and on-going | Improve visitor statistic collection to permit better assessment of volume and value of tourism Not realized | Immigration officials to define foreign visitor arrivals at least by purpose – transit, day visitor and staying visitor and publish monthly by border post and mode of transport | Number of tourists to Macedonia is currently unknown to the tourism sector institutions | Ministry of Interior | State Statistical Office Agency for Promotion and Support of Tourism | Donor funded opportunity | Data published monthly from spring 2009 |
| 1 2009 and on-going | Provide the industry with monthly accommodation occupancy statistics Partly implemented | Obtain occupancy data monthly from all registered accommodation and publish by accommodation type (star category) and main regions. | Occupancy data is needed for marketing, development and investment planning purposes | State Statistical Office | Agency for Promotion and Support of Tourism, HOTAM and municipalities | Donor funded opportunity | Statistic published monthly to the industry |
| 1 2009 | Develop powerful tourism brand Developed-Macedonia Timeless | Appoint an international consultancy to create tourism logo and slogan as recognizable marks in international communication | Lack of tourism branding | Agency for Promotion and Support of Tourism | Ministry of Economy | Euros 100,000 for consultants | Logo and slogan created by end 2009 |
| 1 2009 and on-going | Establish a dynamic database of tourism products and services Partly realized | Create a database of all tourism products and services to provide outputs via, website, publications, TICs, etc | Comprehensive information presented impartially is required by tourists | Agency for Promotion and Support of Tourism | Municipalities and tourism industry | Euros 50,000 for database | Comprehensive information available online. |
| 1 2009 and on-going | Undertake targeted marketing of Macedonia as a tourism destination Partly realized | <ul style="list-style-type: none"> Identify priority markets and segments Compile and implement annual marketing plan | Marketing needs to be planned and targeted rather than ad hoc promotion in order to maximise impact | Agency for Promotion and Support of Tourism | Tourism industry | Euros 600,000 over 5 years | Marketing Plan and list of joint ventures published annually |
| 1 | Expand the tourism portal and | Agency for Promotion and Support of Tourism and | The Internet is an increasingly | Agency for Promotion and | Tourism industry | Euros 25,000 to expand the portal | 10% annual increase in site |



| | | | | | | | |
|-----------------------|---|--|--|--|---------------------------------------|----------------------------|--|
| 2009 and on-going | create new websites On-going | Exploring Macedonia.com to collaborate in insertion of comprehensive and impartial data on portal as well as new sections for special products such as monastery accommodation, wine route, etc. | important information source for travellers and tour operators | Support of Tourism and Exploring Macedonia.com | | | visits |
| 1 2009 and ongoing | Improve the Tourist Information Centre network Not realized | <ul style="list-style-type: none"> Develop operational guidelines for TICs Deliver regular training to TIC staff Regulate use of TIC name and logo | Although locally funded and operated national standards need to be set for information provision | Agency for Promotion and Support of Tourism | Municipalities Ministry of Economy | Euros 75,000 over 5 years | TICs open seven days a week and increase in visitors |
| 1 2009 | Develop a cohesive and coordinated range of tourist resort promotional materials Realized | <ul style="list-style-type: none"> Develop new and attractive promotional materials | Information disclosure and visitor attraction | Agency for Promotion and Support of Tourism | Municipalities Ministry of Economy | Euros 400,000 over 5 years | New promotional materials by end 2009 |
| 1 2009 - 2010 | Marketing of the Macedonian destinations and attractions internationally On-going | <ul style="list-style-type: none"> Participate in international fairs, promotion in media and cooperation with foreign tour operators | Insufficient promotion internationally | Agency for Promotion and Support of Tourism | Municipalities Ministry of Economy | Euros 500,000 over 5 years | 50% increase in fairs |

| | ECONOMIC DEVELOPMENT OF TOURISM | | | | | | |
|----------------|--|--|---------------------------|------------------------------------|---|--------------------------|-------------------------|
| 1 2009-2012 | Ensuring pre-conditions for Tourism Satellite Accounts (TSA) system Not realized | Introduce turnover monitoring system through TSA | Improved statistical data | Ministry of Finance, National Bank | Ministry of Economy, State Statistical Office | Donor funded opportunity | TSA established by 2012 |



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| 1 2009-2011 | Improved understanding of economic benefits from tourism Partly realized, on-going campaigns | Strengthen Governmental and private sector awareness of tourism's role in the economy through seminar programmes | Improved linkages between tourism and other sectors is mutually beneficial and reduces economic leakages | Ministry of Economy | All Government Ministries/Departments Chambers of Commerce Private Sector NGO'S | Actions conducted under existing Ministerial admin/other budgets Possible donor funded opportunity | Development and implementation of seminar programme |
|----------------|--|--|--|---------------------|--|---|---|

| | INVESTMENT POLICY | | | | | | |
|-------------------------|--|--|---|---------------------|---|--|---|
| 1 2009 | Tourism given priority economic sector status by Government Realized | Ensure that tourism becomes the sixth economic sector given priority status by Government/Invest Macedonia | Priority sector status raises the profile of tourism and helps attract interest and investment | Ministry of Economy | Invest Macedonia/ Agency for Foreign Investments | Actions conducted under existing Ministerial admin/other budgets | Tourism granted priority status by Government |
| 1 2009 | Assist the development of small to medium sized tourism enterprises Partly realized | Set up a small business advisory service for tourism sector investors in Government | Advice to potential investors will result in better planned and viable businesses | Ministry of Economy | Ministry of Agriculture/IPARD Chambers of Commerce/Private Sector | Actions conducted under existing Ministerial admin/other budgets | Small/medium sized business advisory service for tourism sector established |
| 2 2011 and on -going | Encourage and assist the attraction of domestic and foreign investment into the Macedonian tourism sector Realized | Plan, organise and launch an initial and a follow - up Tourism Investment Forum/Fair | Enabling potential investors/advisors to meet owners of project opportunities will assist the pace of tourism development | Ministry of Economy | Invest Macedonia/ Agency for Foreign Investments Ministry of Agriculture/IPARD and Chambers of Commerce/Private Sector | Euros 300,000 for two Forums/Fairs | Holding of 2 Tourism Investment Forums/Fairs |
| 1 2009 and | Improve confidence in the status of land title/ownership | Assist the process of Land Cadastre development | Transparency of land ownership is fundamental to assisting the | Ministry of Economy | Invest in Macedonia/Agency for Foreign Investments | Actions conducted under existing Ministerial admin/other | Improvements in the registration process generally and where tourism |



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| on-going | Not realized | | investment process | | Ministry of Agriculture/IPARD and Chambers of Commerce/Private Sector | budgets | investments are concerned |
|----------|--------------|--|--------------------|--|---|---------|---------------------------|

| | ORGANIZATION | | | | | | |
|----------------|--|---|---|-----------------------|--|--|--|
| 1 2009 | Strengthen the Tourism Sector of the Ministry Partly realized | - Engage Short Term Technical Assistance to advise on recruitment and operational and management systems and establishment of the Agency for Promotion and Support of Tourism - Recruit the following senior personnel for the Department: <ul style="list-style-type: none"> • Department Head • Economist • Strategic Planner • Senior Administrator | A Tourism Department is essential to ensure that Government policies and objectives and target are fulfilled | Ministry of Economy | Ministry of Finance | Donor funded opportunity | Tourism Department strengthened and fully operational by end 2009 |
| 1 2009-2010 | Strengthen the capacity of the Agency for Promotion and Support of Tourism Realized, but there is still a need for strengthening the capacity of the Agency | Engage long term technical assistance to coach CEO, Marketing, Development and HRD directors and staff of the new Agency for Promotion and Support of Tourism | The new organisation will need to build its capacity very rapidly and is likely to lack international expertise | Ministry of Economy | NGOs | Donor funded opportunity | Fully functional Agency for Promotion and Support of Tourism by end 2009 |
| 2 | To ensure industry and regional local government input | Constitute an Advisory Council to the Agency of Tourism over the | An effective public private partnership is essential to | Industry Associations | Ministry of Economy, Regional Local Governments, | Actions conducted under existing Ministerial | Council in place by mid 2009 |



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|----------------|---|--|---|---------------------|---|--|---|
| 2009 | and participation in tourism growth and effective public private partnership Not realized | following themes: marketing and promotion; product development; human resource development and service standards; and, roles and functions of the Agency | success in the growth of the tourism sector | Ministry of Economy | Industry, Agency for Promotion and Support of Tourism Private Sector | admin/other budgets | |
| 2 2009-2011 | Make the categorisation of accommodation more realistic and meaningful Not realized | <ul style="list-style-type: none"> Introduce quality criteria into requirements Align star ranges to equate with Western standards | The current system is not enforced fully | Ministry of Economy | Municipalities, Private sector | Actions conducted under existing Ministerial admin/other budgets | Revised scheme in place by end 2009 and fully operating by 2010 |

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| | TOURISM AWARENESS | | | | | | |
| 2 2009 and on-going | Develop and implement a Tourism Awareness Programme Partly realized with promotion campaigns | <ul style="list-style-type: none"> Launch a public awareness campaign for tourism and visitor hospitality Introduce tourism awareness/ career opportunities into the high school curriculum | Ensure full awareness of the economic and social benefits of tourism and encourage better hospitality | Ministry of Education, Ministry of Economy | Agency for Promotion and Support of the Tourism, HRD Committee | Euros 200,000 for a 5 year campaign | Increase in students training for tourism industry |