

PROCEEDINGS²⁰¹⁵



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PLANNING TOURISM DEVELOPMENT IN REGIONAL FRAMES

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ABSTRACT

Tourism has emerged as important factor for regional development by influencing major economic and social impacts at regional and local levels, particularly in the areas where tourism activities take place. It contributes to integrating less developed regions or gives them equal access to the fruits of growth. This research investigates tourism contribution to regional development in Macedonia. In particular, the paper explores and compares eight planning regions from tourism prospective, thus pointing to the importance of applying the concept of tourism planning. For this purpose, it reports on analyses based on stylized facts obtained from secondary data spreading over a sample period from 2003-2013. The outcomes point to the fact that the South-West region is the leading statistical region in Macedonia when referring tourism and regional development issues. The paper urges the need for identifying effective framework for mitigating modest results and creating sound economic and tourism policies. Furthermore, one of the major challenges consists of setting up mechanisms to improve competitiveness and quality of tourism at regional and local levels, as well as to ensure sustainable and balanced tourism development.

KEYWORDS: Tourism; Economic contribution; Regional development; Planning regions; Macedonia.

INTRODUCTION

Regional development of tourism can trigger general economic growth by creating new dynamic. It can contribute to better land use planning by countering rapid urbanization in developed countries and by attracting populations to new regions where tourism is developing. However, some guidelines for development must be laid down in order to preserve resources, ensure complementarity between areas and define tourism poles. Yet, tourism development in the underdeveloped areas enables development of the periphery, retaining the population in the home land, infrastructure is improved as well as all other activities which contribute to prosperity of the region and a country.

Like many countries, Macedonia has been affected by growing regional inequalities. Namely, the pre-existing regional inequalities have intensified during the transition process in 1990s and have been exacerbated by non-economic factors. As a result to that, per capita income in the capital city of Skopje is far above the rest of the country and became the main pole of development. While the other regions have secondary towns that are poles for their development, none can compete with the capital. Consequently, this kind of mono centric pattern of development underpinned huge differences in life quality among other regions.

Accordingly, the regional policies have been put in place over the years and a process of decentralization has been applied since the end of 2001 conflict. However, they have as

yet not addressed many fundamental inequalities. In recent years eight planning regions have been defined, each with own specific characteristics and development problems. In that line, the Law on Equal Regional Development, set in 2007, laid the foundation for a regional policy that conforms to EU standards and foresees resolving the problem of delayed development of some regions in an institutional manner. For that purpose, a Council for Equal Development has been established with a mandate to coordinate regional development policy. Moreover, a Council for the Development of the Planning Regions has been established as a body responsible for policy implementation in each planning region. The former Agency for Economically Underdeveloped Areas was transformed into the Regional Development Bureau. Additionally, the National Strategy for Sustainable Development and National Strategy for Regional Development offered possibilities for revitalization of numerous deserted areas in Macedonia. Furthermore, recently revised National Strategy of Tourism Development gives recommendations for tourism development and identifies five strategic clusters as a framework to Macedonian tourism development.

The objective of this paper is to disentangle tourism influence on regional development of Macedonia in terms of basic tourism indicators. In particular, the paper makes an attempt to explore and compare eight planning regions from tourism prospective, thus pointing to the importance of applying the concept of tourism planning. For this purpose, it reports on analyses based on stylized facts obtained from secondary data spreading over a sample period from 2003-2013. The outcomes point to the fact that the South-West planning region is the leading statistical region in Macedonia when referring tourism and regional development issues. Furthermore, it urges the need for identifying effective framework for mitigating the up-to-date modest results and creating sound economic and tourism policies. The remainder of the paper is organised as follows: Section 2 provides a critical overview of the theoretical and empirical literature on the tourism-regional development relationship. Section 3 provides the analysis, results and discussion of the research. Future challenges and recommendations are presented in the final section.

LITERATURE REVIEW

The concept of regional development includes on one hand, the dynamics of development of specific areas, primarily understood as a regional economic development of those areas, but also regional traffic, population or environmental development. There is a large body of literature which main thesis are that regional development must be based on the exploitation of best potentials of the regions environmental features, and sustainable development must be based on reasonable regional development.

In this respect, the conventional thinking about the relationship between tourism and regional development is present in many studies (Sharpley & Telfer, 2002; Rayan, 2010; Stabler et al, 2010). Other researchers investigate the local, place-based factors that influence tourism development, and ask why some tourism areas develop more than others (Raina and Agarwal, 2004). Likewise, a focus is put specifically on the less developed world and by arising many assumptions about the role of tourism in development and, in particular, highlighting the dilemmas faced by destinations seeking to achieve development through tourism (Huybers, 2007; Telfer & Sharpley, 2008). Some authors even endeavor to a critical approach within a multi-disciplinary framework to relook at the complex phenomenon of tourism development (Babu et al, 2008; Ramos & Jimenez, 2008).

Tourism is seen as a 'sunrise' industry that is labor intensive and therefore offers the potential to be a substantial source of employment. In short, much attention has been directed to tourism's economic potential. Due to the relationship between food and tourism, some authors underscore the significant opportunity for product development as a means to rural diversification (Bessière, 1998). Others examine the contemporary issues and reasons for tourism development as a strategy for urban revitalization (Pearce & Butler, 2002) as well as for providing the basis for a better informed integration of tourism in regional development strategies (Sharma, 2004). Moreover, some discussions are towards various policy innovations as activities by regions in terms of tourism development considering continuous growth within the sector (Giaoutzi & Nijkamp, 2006). Additionally, as tourism and regional development are closely linked, regions and local authorities play a key role in the formulation of policy and the organization and development of tourism (Constantin, 2000).

ANALYSIS, RESULTS AND DISCUSSION

Generally, the paper addresses the issues of tourism flows, accommodation capacities, as well as tourism potentials of the South-West region. For this purpose, the analyses are based generally on official sources of secondary data spreading over the sample period 2003-2013. The research findings point out that the South-West planning region is the leading statistical region in Macedonia when referring tourism and regional development issues.

NUTS Classification

Under the imperative to harmonize its laws with the EU, in 2007 Macedonia adopted the Nomenclature of Territorial Units for Statistics (NUTS 3 level) and created eight statistical regions: Vardar, East, South-West, South-East, Pelagonija, Polog, North-East and Skopje. These regions serve as main units for development planning. Moreover, they have been assigned the role of planning regions entitled for planning process and implementation of a consistent regional development policy and for harmonization with EU regional policy. Each of the planning regions has a Centre for development established for the purposes of carrying out professional tasks relevant for the development of that particular region. The experience of the Central and Eastern European countries show that there is no obligation under the EU law to align NUTS units to the existing administrative organization of the country.

Tourism Flows

The planning regions were created for regional development planning and for realization measures and instruments for promoting balanced regional development. With regards to tourism development, the data point to the South-West planning region as the leading statistical region in Macedonia.

Table 1 describes tourist arrivals within 2003-2013. It is noticeable that the South-West region is by far absolutely dominant in terms of tourist arrivals in comparison to other planning regions in Macedonia. In 2009, 170,127 domestic tourists visited the South-West region, thus representing 52% of total domestic tourism demand. Similar positive conclusion can be underlined when referring international tourism demand, when 87,353 foreign tourists visited the region, which represents one-third of total foreign tourists in Macedonia. Furthermore, we may emphasize that yearly average of tourist arrivals is 247,644 (43.8%) or nearly one-half of total tourist arrivals in Macedonia. This fact

indicates that the South-West region is the leader in tourism development and may serve as good example for other planning regions.

Table 1. Tourist arrivals by statistical regions in Macedonia, 2003-2013

Year/Region	Vardar	East	South-West	South-East	Pelagonia	Polog	North-East	Skopje
2003	12,698	8,602	241,380	35,313	63,689	16,255	4,540	100,674
2004	8,334	9,865	222,950	44,094	56,710	22,679	3,373	97,010
2005	7,564	9,377	236,434	61,851	58,553	20,555	3,672	111,700
2006	8,173	12,069	233,218	58,577	51,970	21,890	2,433	111,143
2007	8,419	10,813	255,257	66,043	51,715	17,188	3,657	123,120
2008	7,799	13,739	276,669	84,031	63,325	19,153	3,395	138,209
2009	9,448	12,680	257,480	90,998	50,740	31,596	3,560	131,268
2010	10,572	13,054	234,665	84,856	69,712	31,828	3,098	138,456
2011	12,086	13,615	249,746	108,555	76,469	29,153	3,803	154,163
2012	15,867	18,865	251,462	106,978	72,054	29,884	4,446	164,077
2013	17,196	20,747	264,826	109,982	70,312	30,823	5,584	182,324

Source: State Statistical Office (various years).

The South-West region has once again the leading role when analyzing tourist nights spent. Namely, Table 2 performs that 53-67% of total tourist nights spent are noted in this region in the past eleven years, or 61.5% in average (1,263,750). This fact is not a surprise since it is in a direct correlation to the previously analysis outcome when tourist arrivals are analyzed. Once again it can be concluded that the South-West region still has the biggest piece of the cake, although a downward trend is noted from 2008-2010 as a consequence to the world financial crisis.

Table 2. Tourist nights spent by statistical regions in Macedonia, 2003-2013

Year/Region	Vardar	East	South-West	South-East	Pelagonia	Polog	North-East	Skopje
2003	30,859	22,171	1,339,022	169,100	202,424	39,536	6,365	197,390
2004	17,772	26,406	1,170,481	233,738	176,930	53,450	5,684	180,973
2005	15,803	19,909	1,288,135	208,858	178,814	50,476	6,066	201,980
2006	16,880	28,989	1,244,487	218,077	155,461	53,824	4,003	195,674
2007	15,530	21,694	1,351,806	211,619	152,726	37,986	5,677	222,674
2008	13,861	28,449	1,452,205	260,351	171,928	45,345	5,130	258,251
2009	17,228	27,509	1,326,192	277,030	139,699	61,146	6,247	246,555
2010	20,137	25,687	1,168,824	262,787	170,354	61,455	5,628	305,345
2011	21,139	28,852	1,209,187	312,377	208,918	54,787	6,807	330,967
2012	25,989	37,358	1,198,260	305,163	174,304	56,055	7,920	346,643
2013	30,840	42,222	1,152,651	327,279	162,752	61,652	8,244	371,535

Source: State Statistical Office (various years).

The analyzed data perform that even 71% of total domestic nights spent and 43% of total foreign nights spent are registered in the South-West region. The last available official statistical data for 2013 indicate that 53.4% of total tourist nights spent is recorded in the South-West region.

Sustainability of tourism as a leading accelerator for development in the South-West planning region is supported by another positive finding. Namely, this region is well-established as a leading tourist center in Macedonia since it fulfills the highest average length of stay. So, between 2003-2013, the average length of stay is between 4.4-5.5 days, or an average of 5.1 days per year for the observed period. When compared to the average

of Macedonia, which is between 3.1-4.2 days (an average for the sample period of 3.6 days), it is 1.4 times higher. So, tourism results of the South-West region must be respected since appoints tourism as a strategic priority area for regional development. The issue of accommodation capacity is addressed with an aim to lead us to concluding remarks weather key actors, which are responsible for tourism policy, should carry out measures and activities for enhancing tourism competitiveness in the South-West region. Table 25 and 26 give an overview of the accommodation capacity in all eight statistical planning regions in Macedonia during 2008-2013. Based on Table 3, it is noticeable that during the sample period, this region in average accounts 60.9% of total number of rooms in Macedonia. So in average, the South-West region has 16,109 rooms, creating 5 times bigger accommodation capacity in terms of rooms compared to the Pelagonia region (3,282 rooms) and even 54 times bigger compared to the North-East (only 298 rooms).

Table 3. Rooms by statistical regions in Macedonia, 2008-2013

Year/Region	Vardar	East	South-West	South-East	Pelagonia	Polog	North-East	Skopje
2008	550	588	16,154	2,095	3,053	1,020	291	2,201
2009	508	598	16,369	2,152	3,102	1,080	297	2,284
2010	554	533	16,013	2,105	3,390	1,011	292	2,291
2011	589	544	16,033	2,277	3,330	1,018	302	2,355
2012	699	599	16,035	2,298	3,497	1,014	306	2,439
2013	690	620	16,050	2,346	3,322	1,072	300	2,487

Source: State Statistical Office (various years).

Table 4 presents the accommodation capacity of the regions in terms of hotel beds. In average, the South-West region encompasses 59.7% of total number of hotel beds in Macedonia, so with an average of 41,598 hotel beds it has 4 times bigger accommodation capacity compared to the Pelagonia region (9,783 beds) and even 60 times bigger compared to the North-East region (only 697 beds).

Table 4. Beds by statistical regions in Macedonia, 2008-2013

Year/Region	Vardar	East	South-West	South-East	Pelagonia	Polog	North-East	Skopje
2008	1,504	1,729	41,703	5,893	8,993	3,046	800	5,429
2009	1,360	1,718	42,103	5,750	8,999	3,182	805	5,644
2010	1,496	1,591	41,458	5,714	10,229	3,057	633	4,914
2011	1,701	1,606	41,454	6,069	10,165	3,058	645	5,039
2012	1,829	1,721	41,458	6,088	10,310	3,059	653	5,169
2013	1,819	1,826	41,411	6,298	10,001	3,153	647	5,142

Source: State Statistical Office (various years).

In order to gain more interesting concluding remarks, the investigation continues with analyses on social impact of tourism. In this respect, Table 5 presents some basic socio-economic indicators by statistical regions in Macedonia for 2011.

Table 5. Socio-economic indicators by statistical regions in Macedonia, 2011

Region	Estimated population	Natural increase rate	Employment rate	Unemployment rate	Average net wage per employee (EUR)	Active business entities	GDP per capita* (EUR)
Vardar	153,822	-0.3	38.0	36.4	260	5,858	3,333
East	179,387	-1.9	48.7	16.4	244	5,845	3,335
South-West	221,517	1.3	32.4	42.8	298	7,385	2,509

South-East	173,056	0.4	64.4	9.3	261	6,248	3,544
Pelagonia	233,628	-3.0	43.8	31.4	311	8,308	3,636
Polog	315,964	3.7	30.0	31.8	319	7,100	1,594
North-East	175,266	1.4	21.7	59.6	402	4,279	1,753
Skopje	605,899	4.3	38.9	30.7	584	28,095	5,076

Source: State Statistical Office (2012: 93-107).

Note: *Data for 2010.

The demographic indicators at regional level presented in Table 27, show considerable differences which point to big disproportion in the territorial distribution of the population. The Skopje region encompasses one-third of total population in Macedonia confirming the forth mentioned fact for mono-centric development. Differences are also noticeable in natural increase rate. Namely, half of the regions are below the national average natural increase rate, which result in unfavorable demographic policy. The employment and unemployment rates of the population at the regional level show oscillations (differences) in relation to the total rates at the country level. In this respect, the employment rate in the South-East, East and the Pelagonia region is above the total rate at the national level, with the South-East region having the highest employment rate of 64.4%. Concerning the South-West region, the employment rate is 32.4% and simultaneously has very high unemployment rate of 42.8%. Since tourism is the leading source of income and local economic development in this region, it argues the necessity for improvement in this issue. Yet, the average net wage per employee is only 298 EUR being below the national average. Furthermore, Table 27 presents data on active business entities and GDP per capita. In this respect, the biggest share in GDP of Macedonia in 2010 belongs to the Skopje region, while the smallest share belongs to the Polog region. Compared to the average of Macedonia, the higher share belongs only to the Skopje region, while all other regions had an average below the national.

FUTURE CHALLENGES AND RECOMMENDATIONS

Positive effects of tourism are rising from day to day, not only for a separate region like the South-West, but also for Macedonia. It is noticeable that tourism has strong influences on the regional development so the developing countries as Macedonia are exploring it as a chance for development. Namely, tourism development affects the regional development and is inter-connected with variety of other activities, like new jobs creation, traffic development and higher prices of land, from agricultural to building land, and alike.

However, numerous constraints and opportunities for regional prosperity through tourism development arise in the case of the South-West region. The key challenge is the lack of critical mass of users and suppliers. The local consumer base tends to be too small to support a diversity of businesses. Consequently, it is difficult to develop a range of tourism product, and many regional destinations become tourism 'monocultures' with a small number of product types. Furthermore, tourism businesses tend to build greater reliance on tourism markets than those in major urban areas. This increases the pressure on tourism infrastructure, particularly transport and destination marketing. It also increases the need for tourism businesses to collaborate within and across other seven regions, as it will require a number of destinations to build an experience that will justify a visitor making the trip.

Beyond tourism policy, regional development policy generally can contribute to innovation capacity of destinations. In this respect, it is necessary that several point marks

are included: (i) Departments of regional development to recognize that departments of tourism have traditionally been charged with promotion rather than development and management; (ii) Many regions are not well connected with the people and organizations who represent important interests at state and national level, and facilitation is required to forge connections; (iii) Expansion of public sector funding programs to include build capacity to assess feasibility; and (iv) To follow recent trends in regional development programs toward specific developments with immediate impact on particular communities.

The research in general presents that the potential role of tourism to economic development of the South-West region is significant. However, further tourism development depends on: (i) Public policies directed towards specific investments, which is tailored according to the needs of the region; (ii) Efforts to increase tourist accommodation capacity and the occupancy rate in the planning region; and (iii) Significant efforts to increase tourism income through subsidies or tax deductions as precondition for regions' tourism development.

The paper allows increased understanding of the way tourism operates in the South-West region, and identifies potential challenges Macedonia may face in its attempt to employ tourism as part of a comprehensive regional development strategy. At the same time, it defines some strength that can be brought to tourism planning and management processes in the South-West region.

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