

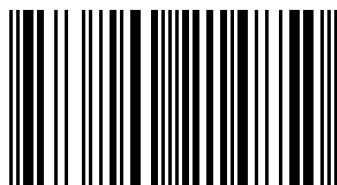
The state is the supreme organization of humanity today, and tourism is one of the fastest growing economic sectors in the countries which has huge potential for attracting foreign and domestic investments, which also means an opportunity for new working positions. The states are working to improve the tourism offer through the promotion of: cultural, lake and river, mountain, spa, sports, hunting, wine, winter, archaeological, religious, rural and rural eco-tourism and congress tourism. Also a series of activities are being undertaken for the development of the national parks and putting them in service of tourism development and promotion of the natural beauties. In this book we will give a scientific and theoretical overview of the contribution and impact of the state for the tourism development with reference to the new forms to boost tourism as modern phenomenon.



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## State measures for the development of the modern Macedonian tourism



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**STATE MEASURES FOR THE DEVELOPMENT  
OF THE MODERN MACEDONIAN TOURISM**

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## INTRODUCTION

The state is the supreme organization of humanity today, and tourism is one of the fastest growing economic sectors in our country which has huge potential for attracting foreign and domestic investments, which also means an opportunity for new working positions. Thence, the state is working to improve the tourism offer through the promotion of: cultural, lake and river, mountain, spa, sports, hunting, wine, winter, archaeological, religious, rural and rural eco-tourism and congress tourism. Also a series of activities are being undertaken for the development of the national parks and putting them in service of tourism development and promotion of the natural beauties.

In this book we will give a scientific and theoretical overview of the contribution and impact of the state for the tourism development with reference to the new forms to boost tourism.

Modern tendencies regarding the development of tourism in the world show that it is an occurrence that constantly gets new values. It is seen as a rising number of tourists who engage in this activity and generate income in it, and as the appearance of new service providers and the development of economic and non-economic active participants in the tourist offer. It is more pronounced the attention in the broad population structures for new tourist contents. This means that tourism in recent times include applicants for tourist services with different affinities. According to the width and heterogeneity of requirements more dynamic selectivity in the tourism development is based. From this intention of selectivity arises the appearance of new specific types of tourism, which the development basics are found in the interactive relationship between promoted and sophisticated requirements of users of the services and opportunities available to them to respond. Although the conditions in the world as a consequence of the economic crisis and transition processes are highly complex, the countries that aspire revival of the economic development and improvement of social relations takes a series of measures for tourism to become part of the preferential character. In this direction are undertake activities on the domestic and international plan. Some of them like subsidization of foreign attendance, tax facilities and self-employment projects have already yielded results. Thus, have been opened the possibilities of using the pre-



accession funds of the European Union, where the selectivity of tourism development has a special place.<sup>1</sup>

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<sup>1</sup> Agency for Promotion and Support of the Tourism of the Republic of Macedonia, <http://www.tourismmacedonia.gov.mk/Uploads/FINALNA%20STRATEGIJA%20ZA%20SPORTSKI%20TURIZAM.pdf>, accessed on July 10, 2016

## 1. SCIENTIFIC CONCEPTION OF TOURISM

In the literature, various authors may meet different definitions of the term "tourist", "Tourism" and "travel arrangements". Because of their frequent use in everyday life, it comes to general conclusion that large numbers of people who experientially understand that denote those terms. This broad stance often absorbs the experiences and perceptions of citizens, and that knot creates the public understanding of the occurrences.

But unlike the first, the second is called scientific standpoint that is focused on explaining the essence of the occurrence and aims to focus on understanding the legality and phenomenology of the appearance.

According to the World Tourism Organization (WTO)<sup>2</sup>, tourism is defined as "word of activities of people during their travel and stay in a place beyond their normal environment, but not more than one calendar year, for a holiday or for business or other reasons not related to the acquisition of salary in the places they're visiting."<sup>3</sup>

The persons mentioned in the definition of tourism are called visitors. The visitor is "any person traveling to a place that is not his usual environment, where he is staying less than 12 months and whose main reason for travel is different from activities that would receive a salary in the place he's visiting"<sup>4</sup>

WTO definition distinguishes between two categories of visitors:

- Tourist - temporary visitor who stays at least 24 hours in the country he visits and
- Traveler - temporary visitor who stays less than 24 hours in the country they visit (including cruise passengers).

About the term "tourist" and "tourism" reigns many semantic confusions and in the literature may be encountered numerous definitions. General aspects indicate the need of the overall defining of tourism as a global phenomenon. In fact, tourism in general is

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<sup>2</sup> World Tourism Organisation (WTO)

<sup>3</sup> WTO (1995): Concepts, Definitions and Classifications for Tourism Statistics – A Technical Manual, Item 3, WTO, Madrid, pg.21.

<sup>4</sup> Ibid.

defined as a complex social phenomenon. It can be concluded that on that basis there is general agreement among all those who study tourism. More precise determinations of tourism highlight its spatial, economic, cultural, environmental or other dimension, which is characteristic to a greater or a lesser extent for almost all complex social phenomena.<sup>5</sup>

The main practical reason for exact definitions of the terms "tourism" and "tourist" arises from the necessity to establish appropriate statistical standards. According to the statistical criteria, tourism is the aggregate of the term "tourist"<sup>6</sup>

Tourism is a modern phenomenon. The phenomenal quality of tourism arises from the growing mass of its participants, the specifics it owns and organizational structure. It is marked as a lifestyle of most of the world population. Economic accomplishments underline this activity as "tourism industry". On the basis of tourism development and the involvement of numerous branches and activities are differentiated several occupations that act in this activity. They have a direct role in conducting the work process. Successful execution of the work of different occupations depends on the correct approach to their shaping. That is a reason for tourism to cause the attention of the professional and scientific population. Scientific and vocational approach is based on the researches that have a fundamental character. The unity of these findings is a necessity in treating the hospitality field. In this context, tourist-agency work that requires appropriate research occurs.<sup>7</sup>

Tourist agents receive provisions for a number of elements of the services they provide or through the addition of provision in the base amount of the service. There are companies which specialize in this direction and strictly work on this business.<sup>8</sup>

Considering the market developments and changing consumer requirements, as well as dynamic changes incurred thanks to new technological solutions, tour operators often

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<sup>5</sup> Ackovska Maria, (2009), *Tourism and Economic Development of the Republic of Macedonia*, Economic Institute-Skopje, p.25

<sup>6</sup> Ibid.

<sup>7</sup> Martinoski Naum, (2005), *Travel agencies*, second edition, University St. Kliment Ohridski, Faculty of Tourism and Hospitality, p.7

<sup>8</sup> Syrratt Gwenda, Archer Jane, (2003), *Manuel of Travel Agency Practice*, 3<sup>rd</sup> edition, Esvier Butterworth Hainemann, Burlington, Oxford, pg.52

perform their own review of organizational solutions that must not be inflexible. Exactly latest tendencies and operations of tour operators in conditions of growing competition indicate that those companies that have transnational models of organizations are successful along with a flexible management structure and simultaneously focused on developing partnerships with various "players" in tourism market.<sup>9</sup>

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<sup>9</sup> Durasevic S., (2008), Travel trips - Modern Concepts of Sales, CID, Podgorica, p.166.

## 2. DEFINITION AND TYPES OF TOURIST ARRANGEMENTS

Tourist arrangements are the most important product that the travel agency has created and placed on the market. The process of the arrangement is the result of the organizational function of the travel agency, specifically it covers assemble of different activities, preparation, organization and sales and performance of organized trips. By its internal structures, tourism arrangement is a combination of services for a larger number of different participants in the tourism market.

It's about the services provided by hotels, transport companies, travel agencies and others, which are intended to meet tourist needs. Although it is a matter of various activities and services of a large number of economical (often non-economic too) subjects, a mark of the tourist arrangement is its completeness: routes, contents, time of performance, schedule of certain activities, conditions, and which is especially important - the only price.<sup>10</sup>

On the basis of the analyzed features D. Popov gives the following definition: "A tourist arrangement is a set of services necessary for the realization of a tourist trip, provided by traffic, catering and other organizations that perform a service for the service of passengers and tourists, and which the organizer of the trip has combined in a single whole receiving a new quality of its "own" service with whom it plays on the market."<sup>11</sup>

These features are also pointed out by B. Vukonic, who defines tourist arrangements as two or more in time and content synchronized services offered to the potential tourists, either by the agency's own decision or at the request of the client, and with which the tourist satisfies partially or fully his needs.<sup>12</sup>

According to the abovementioned, here it is especially its emphasized that the tourist arrangement must consist of combined services, and yet the individual services of the

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<sup>10</sup> Spasić Vesna, (2010), Management of Travel Agencies and Travel Organizers, 6th Edition, University Singidunum, Belgrade, p.118.

<sup>11</sup> Popov D., op.cit., p.306

<sup>12</sup> Vukonik B., op.cit., p.151

travel agency (transfer, reservation of accommodation and other services) are not a tourist arrangement.<sup>13</sup>

A relatively simple definition is found in the books by the American authors (Cook A.R., Jahe L.J. and Marqua J.J.): "A package arrangement lists two or more tourist services that the tour operator connects as a whole, such as transport, accommodation, security, transfer and attractiveness."<sup>14</sup>

## **2.1. Criteria for the division of travel arrangements**

The complexity of the tourist market and the great heterogeneity of tourist needs are a significant boost for tour operators when they keep up moving their own service program. Striving to approve the needs and demands of potential tourists, organizers of travel arrangements differentiate the service program by offering numerous and varied travel arrangements on the market. The diversity of tourist arrangements represents the basis for their division by different criteria such as:

- way of forming;
- content of the offered arrangements
- types of basic transport;
- character of the travel agency's operating;
- the manner of performance of the arrangement, i.e. the nature of the trip;
- number of participants;
- age limit of users;
- period of the year;
- duration of the arrangement;

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<sup>13</sup> Spasić Vesna, (2010), *Management of Travel Agencies and Travel Organizers*, 6th Edition, University Singidunum, Belgrade, p.118.

<sup>14</sup> Cook A. R., Jahe L. J. and Marqua J. J., (2002), *Tourism: The business of travel - 2nd ed.*, Prentice Hall, New Jersey, p. 87.

- whether there is or not a companion and
- other criteria.

When distinguishing between travel arrangements, it should be noted that the divisions are not exclusive and that the one organized trip can be counted in different groups depending on the criteria analyzed<sup>15</sup>.

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<sup>15</sup> Spasić Vesna, (2010), Management of Travel Agencies and Travel Organizers, 6th Edition, University Singidunum, Belgrade, p.121.

### 3. TYPOLOGY OF TOURISM

The starting forms of tourism are numerous and constantly changing. The statistical or empirical facts show that about a billion and three hundred thousand people throughout the year are involved in various forms of international and domestic tourism. Apart from the statistical ones about the occurrence are spoken more or less exact facts: from a qualitative, spatial, economic, geographical and psychological character.

Tourism, according to special features or types, is defined from the aspect of the selected criterion according to which we group the turnover of tourists.<sup>16</sup>

Commonly the criteria of grouping according to the shape of the arrival, traveling, purchasing power, age or any other personal characteristic of tourists are used. More complex tourism typologies are performed according to the purpose of the journey. They are thus distinguished: recreational, cultural, ethnic, religious, ecological, health, congress tourism and so on. If the criterion for the tourism typology is taken to be the destination aspect, then we distinguish sea, lake, mountain, urban, rural, spa and other types of tourism.<sup>17</sup>

Depending on the geographical location on which the tourists are located and where their consumption is realized, two dominant groups can be identified: national tourists and tourists on the international level and there are no rare cases when a kind of tourism can be recognized in several group typological scale, depending on the elements it contains.

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<sup>16</sup> Ackovska Maria, (2009), *Tourism and Economic Development of the Republic of Macedonia*, Economic Institute-Skopje, p.30

<sup>17</sup> *Ibid.*



#### 4. CASE STUDY: ANALYSIS AND REVIEW OF THE TOURISM AND TAKEN ACTIVITIES FOR PROMOTION OF THE MACEDONIAN TOURISM<sup>18</sup> FOR THE PERIOD 2011-2015

##### 4.1. TOURISTIC ACTIVITIES AND THE DEVELOPMENT OF THE TOURISM BY YEARS

A tourist is considered to be any person who temporarily spends at least one night in some form of lodging, not located in his own permanent place of residence. The reasons for staying can be different, for example: vacation, recreation, medical treatment, sport, attending studies, business and other reasons, for a period that does not exceed one year. This definition corresponds to the International Recommendations on Tourism Statistics, Rome 1963 and Geneva 1967, as well as to the later recommendations of the World Tourism Organization. With these recommendations, the terms temporary visitor, tourist and excursionist are defined. A temporary visitor is considered to be any person who visits a country that is not his country of permanent residence, for any reason, except for doing business for which he gets remunerated from the country he is visiting. A tourist is considered to be a temporary visitor who visits the country for at least 24 hours, and whose motives for visiting can be: vacation, recreation, medical treatment, sport, attending studies, business and other reasons. **Excursionist** is considered to be a visitor who stays in another country less than 24 hours. The excursionists are not included in this publication. Considering that the tourist is registered in the place or the facility of temporary accommodation, in the event of a change of accommodation, he gets registered again. Therefore, tourism statistics record the number of tourist arrivals, and not the number of tourists.

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<sup>18</sup> The period (2011-2015) analyzed in this book is a period in which the country was still named under its Constitutional name the Republic of Macedonia ("Macedonia"), as official name and it was part of domestic and international tourism activities worldwide. Nowadays, the country is recognized on the touristic maps under its new name as well. From January 2019, the state is using the name Republic of North Macedonia ("North Macedonia") as Constitutional name and erga omnes official name according to the Final Agreement for the settlement of the differences as described in the United Nations Security Council Resolutions 817 (1993) and 845 (1993), the termination of the Interim Accord of 1995, and the establishment of a Strategic Partnership between the parties and the amendments of the Constitution as agreed in this Final Agreement adopted in December 2018 by the Assembly.

A **domestic tourist** is a person with permanent residence in the country who is temporarily present in another place not located in his permanent place of residence, and spends at least one night in some kind of lodging.

A **foreign tourist** is considered to be anyone permanently resident outside the Republic of Macedonia who is temporarily present in the Republic of Macedonia and spends at least one night in some form of lodging.

After the disintegration of former Yugoslavia, tourists from the other Yugoslav republics were grouped as a separate category of foreign tourists. In 1995, tourists from the countries that were created from former Yugoslavia were included in the total number of foreign tourists<sup>19</sup>.

All data for the previous years according to the State statistical office of the Republic of Macedonia have been processed according to this method.

The occupancy rate of bedrooms in the reference period is obtained by dividing the total number of bedrooms used during the reference period (i.e. the sum of the bedrooms in use per day) by the total number of bedrooms available during the reference period (i.e. the sum of bedrooms available per day). The result is multiplied by 100 to express the occupancy rate as a percentage.

The occupancy rate of bed places in the reference period is obtained by dividing the total number of overnight stays during the reference period by the number of the bed places on offer and the number of days when the bed places are actually available for use (net of seasonal closures and other temporary closures for decoration, by police order, etc.) during the reference period. The result is multiplied by 100 to express the occupancy rate as a percentage. Bed occupancy is expressed in percentage using the formula:

No. of overnight stays * 100
No. of beds * No. of days

A tourist resort is considered to be a resort that meets the following conditions:

1. Attractiveness (natural beauties, mineral springs, cultural and historical monuments, cultural, entertainment and sports, events, etc.);

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<sup>19</sup> Statistical review /State statistical office of the Republic of Macedonia, ISSN 0580-454X.Transport, tourism and other services, ISSN 1857-5196; 8.4.16.01(847)

2. Communications (accessibility, transport facilities, etc.);

3. Receptiveness (has accommodation and auxiliary facilities for providing services, for example: crafts and trade services, post (PTT) offices, parks, pools, promenades, etc.).

As there are no general regulations on the conditions which the resorts must meet in order to be declared as a tourist resort, for categorization purposes, the statistics classifies the resorts according to the criterion of "attractiveness" and based upon its definitions, as follows:

1. Skopje, as a resort that attracts visitors as an administrative, political, historical, ethnic, cultural and economic center;
2. Spa resorts, which possess mineral water springs;
3. Mountain resorts - settlements, as resorts at an altitude of over 500 m, or resorts - settlements situated on the territorial area of a mountain;
4. Other tourist resorts are resorts that possess other tourist attractions (for example: climatic, cultural and historical, transport, etc.), as well as riverside and lakeside resorts. In the statistical practice in the Republic of Macedonia<sup>20</sup>, these are resorts situated on the shores of the natural and artificial lakes (Ohrid, Prespa, Dojran, Mavrovo Lake and others);
5. Other resorts that cannot be classified in the previous four groups, but which have accommodation facilities.

T-01: Tourist arrivals and nights spent, 1959-2015			
	Tourist nights spent		
	total	domestic	foreign
1960	868 627	541 334	327 293
1961	1 005 891	646 449	359 442
1962	1 183 384	782 503	400 881
1963	762 743	487 572	275 171
1964	929 600	553 342	376 258
1965	967 677	519 960	447 717
1966	1 141 467	650 606	490 861
1967	1 040 420	524 056	516 364
1968	1 089 205	624 729	464 476
1969	1 342 048	800 301	541 747
1970	1 281 891	716 065	565 826

1971	1 426 398	813 548	612 850
1972	1 579 065	892 089	686 976
1973	1 663 438	890 111	773 327
1974	1 828 910	1 028 324	800 586
1975	2 033 038	1 105 471	927 567
1976	2 006 973	1 114 481	892 492
1977	2 307 136	1 290 184	1 016 952
1978	2 519 690	1 413 953	1 105 737
1979	2 912 045	1 701 388	1 210 657
1980	3 081 372	1 879 367	1 202 005
1981	3 122 190	2 007 835	1 114 355
1982	3 305 140	2 238 488	1 066 652
1983	3 334 031	2 335 794	998 237
1984	3 300 412	2 222 446	1 077 966
1985	3 707 354	2 258 635	1 448 719
1986	3 907 111	2 445 841	1 461 270
1987	3 978 028	2 426 108	1 551 920
1988	3 734 832	2 318 140	1 416 692
1989	3 522 747	2 174 652	1 348 095
1990	3 099 508	1 928 992	1 170 516
1991	2 740 484	2 164 146	576 338
1992	2 139 631	1 757 255	382 376
1993	2 706 373	2 343 710	362 663
1994	2 476 998	2 141 468	335 530
1995	1 804 310	1 528 561	275 749
1996	1 696 930	1 419 665	277 265
1997	1 587 146	1 321 622	265 524
1998	2 426 461	2 066 923	359 538
1999	2 313 142	1 838 748	474 394
2000	2 434 639	1 940 772	493 867
2001	1 254 582	1 041 831	212 751
2002	1 850 384	1 575 664	274 720
2003	2 006 867	1 660 667	346 200
2004	1 865 434	1 504 845	360 589
2005	1 970 041	1 527 053	442 988
2006	1 917 395	1 474 550	442 845
2007	2 019 712	1 501 624	518 088
2008	2 235 520	1 648 073	587 447
2009	2 101 606	1 517 810	583 796
2010	2 020 217	1 461 185	559 032
2011	2 173 034	1 417 868	755 166
2012	2 151 692	1 339 946	811 746
2013	2 157 175	1 275 800	881 375
2014	2 195 883	1 273 370	922 513
2015	2 394 205	1 357 822	1 036 383

**Table 1: Table of tourist arrivals and nights spent, 1959-2015 <sup>21</sup>**

<sup>21</sup> Ibid.

The number of available beds in registered accommodation facilities in the Republic of Macedonia increased from 69.000 in 2010 to 71.225 in 2014. The highest amount of available rooms are still in the category “private accommodation facilities” with a share of around 37 % of the total volume. The amount of beds in hotels increased from 12.300 in 2010 to 15.500 in 2014, with the biggest increase in the 3-star segment. Also the amount of available beds in the 5-star and 4-star segment increased, while the number of beds in the 2-star and 1-star segment decreased. In all other relevant accommodation types (private accommodation, spa accommodation facilities, accommodation facilities for youth and children, camping facilities and accommodation facilities for workers), the number of beds had been relatively stable between 2010 and 2014.

After a period of stagnation (2008 – 2014), the number of overnights sharply increased in 2015 to almost 2,4 million. The number of registered annual overnights in accommodation facilities in Macedonia stagnated between 2008 and 2014 at a level of 2,0 to 2,2 million before increasing by 9 % between 2014 and 2015 reaching almost 2,4 million in 2015. While the number of domestic overnights decreased by almost 300.000 between 2008 and 2015 ( a negative CAGR<sup>22</sup> of 2,7 %), an increase of almost 450.000 overnights was registered by foreign travelers (a positive CAGR of 8,4 %). As a consequence the share of overnights by domestic travelers decreased from 74 % in 2008 to 57 % in 2015.

In 2015 Macedonia generated around 816.000 arrivals with indicated a CAGR of 4,4 % since 2008.

Arrivals (000) 2008 2009 2010 2011 2012 2013 CAGR**										
DOMESTIC	350	329	325	320	312	302	310	331	-0,8	%
FOREIGN	255	259	262	328	351	400	425	485	9,6	%
TOTAL	605	588	586	648	664	702	736	816	4,4	%

**Table 2: Table of arrivals for the period 2008-2013**

<sup>22</sup> CAGR = Compound Annual Growth Rate

Between 2010 and 2014 Macedonia achieved the highest CAGR of overnights by foreigners in the region. The Top 5 municipalities regarding the number of annual overnights (Ohrid, Skopje, Struga, Dojran and Gevgelija) currently generate 75 % of all Macedonian overnights. On top of the list is Ohrid with 818.000 overnights in 2015, followed by Skopje (328.000) and Struga (301.000). The highest share of foreign overnights are currently registered in Skopje (91 %), the lowest in Dojran (5 %). The majority of the bigger Macedonian cities have a normal average length of stay of 1,7 to 2,6 days – the lake destinations of 3,7 to 4,7 days and Debar, as a spa destination, of almost 7 days. Dojran (11,6 %) and Gevgelija (9,1 %) achieved the highest CAGR in overnights since 2008, while the number of annual overnights decreased by 211.000 in Ohrid.

T-3: Tourist arrivals, by statistical regions					
2011	2012	2013	2014	2015	
<b>Total</b>					
<b>647 568</b>	<b>663 633</b>	<b>701 794</b>	<b>735 650</b>	<b>816 067</b>	<b>TOTAL</b>
12 064	15 867	17 196	20 667	24 308	Vardar Region
13 615	18 865	20 747	23 035	25 907	East Region
249 746	251 462	264 826	269 547	298 057	Southwest Region
108 555	106 978	109 982	124 707	133 328	Southeast Region
76 469	72 054	70 312	65 527	62 019	Pelagonia Region
29 153	29 884	30 823	29 143	30 200	Polog Region
3 803	4 446	5 584	6 937	8 125	Northeast Region
154 163	164 077	182 324	196 087	234 123	Skopje Region
<b>Domestic</b>					
<b>320 097</b>	<b>312 274</b>	<b>302 114</b>	<b>310 336</b>	<b>330 537</b>	<b>TOTAL</b>
3 525	4 471	4 120	5 467	7 981	Vardar Region
7 948	12 275	13 582	14 306	16 751	East Region
147 877	140 993	130 020	125 320	136 637	Southwest Region
58 351	58 761	59 977	74 071	82 143	Southeast Region
61 384	52 422	49 635	44 533	40 447	Pelagonia Region
16 196	17 098	15 491	15 886	14 565	Polog Region
1 379	1 166	1 856	2 703	2 059	Northeast Region

23 437	25 088	27 433	28 050	29 954	Skopje Region
<b>Foreign</b>					
<b>327 471</b>	<b>351 359</b>	<b>399 680</b>	<b>425 314</b>	<b>485 530</b>	<b>TOTAL</b>
8 539	11 396	13 076	15 200	16 327	Vardar Region
5 667	6 590	7 165	8 729	9 156	East Region
101 869	110 469	134 806	144 227	161 420	Southwest Region
50 204	48 217	50 005	50 636	51 185	Southeast Region
15 085	19 632	20 677	20 994	21 572	Pelagonia Region
12 957	12 786	15 332	13 257	15 635	Polog Region
2 424	3 280	3 728	4 234	6 066	Northeast Region
130 726	138 989	154 891	168 037	204 169	Skopje Region

**Table 3: Table of tourist arrivals, by statistical regions by year**

According to the State Statistical Office data, the number of tourists in December 2016 is 42.101, and the number of nights spent is 81.060. The number of tourists in December 2016, compared to December 2015, increased by 4.4%, and the number of nights spent increased by 4.7%. The number of domestic tourists in December 2016, compared to December 2015, decreased by 5.3%, while the number of foreign tourists increased by 11.2%. The number of nights spent by domestic tourists in December 2016, compared to December 2015, decreased by 4.6%, while the number of nights spent by foreign tourists increased by 12.5%. In the period January-December 2016, compared to the same period last year, the number of tourists increased by 5.0%, as follows: domestic tourists increased by 4.8%, while foreign tourists increased by 5.1%. In the period January-December 2016, compared to the same period last year, the number of nights spent increased by 2.8%: the number of nights spent by domestic tourists increased by 3.6%, while the number of nights spent by foreign tourists increased by 1.7%.

<b>T-4: An overview of the number of visitors by the country from which the visitors come from</b>					
	Tourists		Nights spent		
	XII 2016	Structure	XII 2016	Structure	
<b>Foreign tourists – total</b>	<b>26</b>	<b>100,0</b>	<b>47 476</b>	<b>100,0</b>	<b>Foreign tourists – total</b>

	<b>383</b>				
Austria	365	1,4	1 142	2,4	Austria
Albania	2 224	8,4	3 227	6,8	Albania
Belgium	201	0,8	355	0,8	Belgium
Belarus	19	0,1	71	0,2	Belarus
Bosnia and Herzegovina	271	1,0	480	1,0	Bosnia and Herzegovina
Bulgaria	4 924	18,7	8 272	17,4	Bulgaria
Great Britain	299	1,1	684	1,4	Great Britain
Germany	581	2,2	1 225	2,6	Germany
Greece	4 298	16,3	6 984	14,7	Greece
Denmark	103	0,4	210	0,4	Denmark
Estonia	17	0,1	42	0,1	Estonia
Ireland	46	0,2	90	0,2	Ireland
Iceland	7	0,0	8	0,0	Iceland
Italy	463	1,8	1 001	2,1	Italy
Cyprus	17	0,1	38	0,1	Cyprus
Kosovo	1 080	4,1	1 945	4,1	Kosovo
Latvia	12	0,0	25	0,1	Latvia
Lithuania	21	0,1	71	0,2	Lithuania
Luxembourg	1	0,0	1	0,0	Luxembourg
Malta	12	0,0	43	0,1	Malta
Norway	52	0,2	134	0,3	Norway
Poland	128	0,5	296	0,6	Poland
Portugal	39	0,2	140	0,3	Portugal
Romania	245	0,9	675	1,4	Romania
Russian Federation	285	1,1	856	1,8	Russian Federation
Slovakia	73	0,3	298	0,6	Slovakia
Slovenia	499	1,9	970	2,0	Slovenia
Serbia	2 571	9,7	4 083	8,6	Serbia
Turkey	2 355	8,9	4 208	8,9	Turkey
Ukraine	125	0,5	324	0,7	Ukraine
Hungary	191	0,7	800	1,7	Hungary
Finland	47	0,2	91	0,2	Finland
France	179	0,7	357	0,8	France
Netherlands	194	0,7	369	0,8	Netherlands
Croatia	830	3,1	1 589	3,3	Croatia
Montenegro	732	2,8	1 176	2,5	Montenegro
Czech Republic	90	0,3	160	0,3	Czech Republic





Domestic	16 605	15 718	94,7	330 537	346 359	104,8	Domestic
Foreign	23 728	26 383	111,2	485 530	510 484	105,1	Foreign
<b>Number of nights spent</b>							<b>Number of nights spent</b>
<b>Total</b>	<b>77 423</b>	<b>81 060</b>	<b>104,7</b>	<b>2 394 205</b>	<b>2 461 160</b>	<b>102,8</b>	<b>Total</b>
Domestic	35 221	33 584	95,4	1 357 822	1 407 143	103,6	Domestic
Foreign	42 202	47 476	112,5	1 036 383	1 054 017	101,7	Foreign

**Table 5: An overview of the number of tourists and overnight stays<sup>24</sup>**

The tourism area in the Republic of Macedonia is monitored with a monthly statistical survey, as well as with five-year surveys on the travel of the domestic population and surveys for foreign tourists in the accommodation facilities and for foreign visitors at the border crossings. They provide monthly and annual data for tourists and overnights by types and categories of accommodation facilities, country of origin of tourists, types of places of residence, facilities and the like. Also, data on the socioeconomic structure of domestic and foreign tourists, the manner and purpose of the trip - the stay, as well as data on the size and structure of costs and other data related to travel-stay.

The catering sector in Macedonia is monitored by quarterly, annual, three-year and five-year statistical surveys, issued by State Statistical Office. These surveys provide data on the size of the turnover and its structure according to the type of services and individual products, quarterly and annual, as well as data on the consumption of raw materials for preparing food in catering - the input, technical equipment and employees in catering according to occupation and education, as well as data on the size of the accommodation facilities, technical and other characteristics that express the level of comfort and the content of the tourist offer.

According to the published data in the Travel & Tourism Competitiveness Index the Seychelles and the Dominican Republic are on top of the list of those countries with the highest share of government expenditure on tourism in relation to the total government

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<sup>24</sup>*Ibid.*

budget. They both have values of more than 20 %, followed by another seven countries with contributions between 10 and 20 %. The first six countries are all islands and in the top 10 are only two European countries (Malta and Iceland). Macedonia is ranked on position 125 out of 141 countries with a percentage of 1,3 % in 2014. In the region only Serbia and Turkey had a lower percentage in 2014. Although the presented figures provide a first insight in governmental spending on tourism, still they need to be seen as approximate values as it is not clear if the same elements are included in each country. In 2011 the government started a subsidy program for Macedonian tour operators and travel agencies to increase the competitiveness of the offered Macedonian holiday packages and, as a consequence, to increase the demand for leisure holidays in the country. In 2015 around MKD 91 million (approximately EUR 1,5 million) have been allocated in the budget of the Agency for Promotion and Support for tour operator subsidies. Subsidies are only granted if certain pre-defined conditions are fulfilled by the holiday package: e.g. minimum stay of three nights with breakfast at an accommodation facility with professional services. Subsidies are granted for bus transportation, air transfer, charter transport, railway transport, combined transport and tour trips. According to the SWOT analyses made by Kohl & Partner<sup>25</sup> main strengths for the tourism in Macedonia are:

- The existing attractiveness for tourists of Skopje and Ohrid as the touristic highlights of the country;
- Existing flight connections of Low Cost Carriers to Skopje and Ohrid;
- Airports in both of the two most visited tourism destinations of Macedonia (Skopje and Ohrid);
- Short distances between the different destinations and attractions;
- Motivated incoming tour operators due to the existing subsidy program;
- Increasing number of overnights by foreigners within the last couple of years;
- Visa free entrance for the majority of the important source markets for Macedonian tourism;

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<sup>25</sup> Kohl & Partner is an independent and internationally operating consulting company, specialized in the field of hotel and tourism development

- Natural resources (mountains, lakes) and cultural heritage.

**According to the same source of analyses the main weaknesses are:**

- Macedonia is still a relatively unknown tourism destination outside the region;
- High seasonality in the main leisure destinations;
- Low amount of direct flight connections to Ohrid;
- Limited financial and human resources within the tourism department of the Ministry for Economy;
- Low annual marketing budget in comparison to other Countries;
- Decreasing number of overnights by domestic travellers within the last couple of years;
- Weak organizational structures below the national level;
- Limited amount of appropriate accommodation facilities outside the main tourism hubs;
- Weak tourism product development on a regional / local level due to a lack of know-how and of financial resource;
- Lack of coordination of the various tourism-related activities on a national, regional and local level;
- No subsidy program for tourism accommodation facilities or tourism attractions;
- No Tourism Satellite Account and irregular visitor surveys;
- Grey market of private accommodation facilities;
- Educational standards in tourism are often low – the same applies to the service quality;
- Poor quality of some tourism facilities (e.g. spas, camping grounds);

**The main opportunities for the developing of tourism are:**

- Proximity to strong tourism outbound markets like Germany or Italy;
- Increasing interest in individual travel;
- Due to experienced travellers there will be a growing demand for new tourism destinations;
- Benefiting from the transit visitors driving through Macedonia;

- Lake Ohrid has the potential to become one of the most popular tourism destinations in Southeastern Europe;
- Skopje as the potential to become one of the most popular city break destinations in Southeastern Europe;
- Positive development in tourism will lead to an increasing income from the tourism industry for private entrepreneurs and the public administration, will create new jobs and will stimulate additional investment;
- Development of attractive tourism products in the surrounding area of existing tourism hubs (e.g. the lake destinations or Skopje);
- Make use of the new flight connections offered by LCCs by promoting Macedonia as an attractive place to visit in those markets;
- Use the further approach towards the EU for the development of business tourism;
- A positive development of tourism often also has a positive effect on the overall image of a country.

In many countries attractive and successful tourism destinations have been developed in the mountain regions. The main travel motives for visitors of mountain resorts are activities like skiing/snowboarding, hiking, biking or enjoying nature. Macedonia currently offers several places with a skiing infrastructure – the biggest ones being Popova Shapka and Mavrovo, both situated in the Western part of the country) with several ski lifts and slopes. There are also some smaller skiing areas with only a few lifts (like the ones in Krusevo, Kopanki or Kozuf near the Greece boarder)<sup>26</sup>. At the current stage, the Macedonian Mountain Resorts mainly consists of some ski lifts/slopes and different accommodation facilities in the near surrounding. For the summer time hiking trails are often available. Mountain Resorts are currently mainly visited by local tourists (Macedonia/neighbouring regions) – often as a one-day visit. Although often situated in scenic and high altitude locations the majority of the Macedonian Mountain Resorts are currently only of average attractiveness. The main reasons for this evaluation are outdated ski lifts, low quality of slope preparation, missing summer and entertainment facilities and unsolved ownership structures.

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<sup>26</sup> Macedonia Timeless, link: <https://macedonia-timeless.com/>, accessed June 2015



**Picture 1. Tourist map of Macedonia**

In absence of an access to the sea, the three biggest lakes of Macedonia – Lake Ohrid (248 km<sup>2</sup> are on the territory of the Republic of Macedonia), Lake Prespa (176 km<sup>2</sup>) and Lake Dojran (27 km<sup>2</sup>) – are already visited by a large number of tourists every year. Destinations like Struga and Ohrid (Lake Ohrid) or Star Dojran (Lake Dojran) are popular holiday destinations with a touristic supra- and infrastructure. All three lakes are situated directly at the boarder – Lake Ohrid belongs to Macedonia and Albania, Lake Prespa to Macedonia, Albania and Greece and Lake Dojran to Macedonia and Greece. The lakes have different characteristics regarding size, depth, access, population, etc.

The most developed lakeside is at Lake Ohrid with a large number of tourism supra- and infrastructure facilities, followed by Lake Dojran. Lake Prespa is the least developed one. Demand is mainly generated during the summer months – Lake Ohrid as currently the only one generating significant international demand. Lake Ohrid is one of the tourism highlights of Macedonia and an UNESCO World Heritage site.

Also Lake Dojran attracts significant numbers of tourists during the summer months and improved its attractiveness recently. Lake Prespa, as the least developed one, is only of limited attractiveness for visitors at the moment. Several hot mineral water springs are currently used for health purposes in Macedonia - the majority of them are located in the North-eastern and South-eastern part of the country. In majority of the cases a medical treatment centre including several accommodation units have been built around the hot mineral water springs. Like in many European spa destinations back in the 1980s the focus in the Macedonian spa destinations is almost exclusively on medical treatments for people with certain illnesses. There is currently only a very limited amount of spa and wellness products offered at the majority of those spa destinations (with the exception of Banjiste)<sup>27</sup>.

#### **4.2. STATE MEASURES FOR PROMOTION OF THE TOURISM**

In the direction of promotion of tourism, in the analyzed period 2011-2015 numerous projects and activities have been realized in the Republic of Macedonia, which contributed to country being a more attractive tourist destination. Significant projects that have been implemented in the past period by the state authorities are the following:

- Project: Subsidizing an organized foreign tourism turnover in the Republic of Macedonia

With the Project for subsidizing some organized foreign tourism operations, which increased the competitiveness of domestic tourist offers, the number of foreign tourists and the foreign exchange inflow in the country increased too. Subsidies range from 10 to 65 Euros per brought tourist, depending on the type of vehicle and region of origin.

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<sup>27</sup> Macedonia Timeless, link: <https://macedonia-timeless.com/>, accessed July 2015

T-6					
Year	2011	2012	2013	2014	2015
Number of subsidies in Macedonian currency – denar	22.064.047	48.000.000	62.820.000	155.000.000	151.000.000

**Table 6. Review of the amount of subsidies for tour operators by years<sup>28</sup>**

The subsidies in 2011 amount up to 22,064,047 denars and in the following years they are increasing continuously. Thus, in 2012, they amount to 48,000,000 denars, and in 2013 they amount up to 62,820,000 denars, which is 30% more than the amount of subsidies in 2012. For 2014, the amount of subsidies has significantly increased up to 155.000.000 denars, and in 2015 for this activity 151.000.000 denars were realized for subsidizing tour operators carrying tourists from the Netherlands, Turkey, Austria, Finland, Serbia, Bulgaria, Albania and other countries.

- The VAT rate is reduced from 18% to 5% for overnight stays, lodging with breakfast, half board and full board in all commercial catering facilities

The effects of reducing the VAT rate are lower prices of services in the accommodation capacities, increased competitiveness, the increase in the number of domestic and foreign tourists and the increase in the profits of the tourist workers.

- Tourist Development Zones

In accordance with the legal framework, the Agency for Promotion and Support of Tourism is launching an initiative for the establishment of the Tourist Development Zones. To this end, procedures for the establishment of 9 tourist zones have been initiated so far, on the lake shores: Ljubanista 1 and 2, Gradiste, Kalishte, Treska - Struga, Star Dojran and Nov Dojran, as well as 2 in Krusevo and Berovo. Of these nine zones, two are formed by the Decision of the Government of the Republic of Macedonia: Ljubanista 1 and Star Dojran.

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<sup>28</sup> *Ibid.*



- Project: Macedonian village

The Macedonian Village project is a tourist attraction and the project is about 12 authentic houses at one place and other facilities from all regions over the Republic of Macedonia, thus providing the tourists with the opportunity to get acquainted with the traditional way of life and the Macedonian crafts. This open-air museum includes: a house from the Berovo - Malesevo region with craft weaving; a house from Delcevo region with a craftwork cabinetmaker; a house with stylistic features of Kratovo, a winery for sale and wine tasting of Macedonian wine; a house with stylistic features of Kumanovo, with a space for traditional local crafts (traditional cuisine); a house with stylish features of Skopska Crna Gora, with a weaving workshop house with stylistic features of Gostivar -Reka, with a grocery house with stylistic features of Gostivar-Galichnik, with a space for making traditional dairy products; a house with stylistic features of Tetovo-Polog, with a kitchen workshop; a house with stylistic features of Veles, with skinning craft house with stylistic features of Prilep, with a room for processing a tobacco house with stylistic features of Bitola, a workshop for pottery, souvenir shop, an national restaurant, an inn, a commercial part, which includes a fish farm, a barn, a water mill and a rolling mill and a museum building with a multipurpose hall.

- Local and regional competitiveness in the field of tourism

This program includes the realization of specific projects that will have a high impact on the development and promotion of tourism in the Republic of Macedonia. Through this program, funds in the form of grants will be available for interventions such as:: construction and reconstruction of local infrastructure, revitalization of objects of cultural heritage, support for development of tourist services and promotion of tourist offer, promotion of Macedonian tourist destinations and cultural heritage, building of recognizable tourist image by introducing world standards in tourist-catering services and etc. The project is worth around 21 million Euros and is funded in cooperation with the European Commission and the World Bank through the Competitiveness and Innovation Sector within the Instrument for Pre-Accession Assistance (IPA) for the period 2014-2020.

- The development of rural tourism through the IPARD program

Through conducting trainings and seminars on the development of rural tourism, their promotion, as well as supporting the wine tourism

- Financial support through programs to support small and medium enterprises and other funds for construction of family hotels and boarding houses
- Lake tourism

To increase the potentials of Ohrid, Prespa and Dojran Lake by creating conditions for attracting domestic and foreign investors for coastal development and beach arrangement.

- Activities have been undertaken to develop cave tourism in Slatina Cave, Cave Pesna, Cave Golubnik, Cave Ubavica and others through accessibility, marking, illumination of the caves and education of tourist guides for their presentation

Two caves in the Mavrovo National Park and the Vrelo Cave in the Matka Canyon are open to visitors and a web site for speleology in the Republic of Macedonia is also in use.

- Sports tourism

Creating conditions for attracting investments in the capacity building and commercialization and building an infrastructure for alternative sports, such as alpinism, paragliding in Krusevo, Galicica and Matka, cycling and rolling, canoeing on peaceful and wild waters and motorcycle revealing of Macedonia. Special attention is paid to the seasonal winter tourism in the tourist centers: Mavrovo, Popova Shapka, Pelister, Kozuf, Ponikva, Plachkovica, Jablanica and others. The construction of Kozuf Ski Center has increased the number of tourists from Europe who are fond of skiing and other winter sports.

- **Promotional media campaign**

With the campaign "Macedonia Timeless", 9 videos have been made to promote the tourism potential of Macedonia on the most famous TV channels: CNN, Fox Group,

National Geographic, Sky News, Travel Channel, Euronews, Eurosport, NTV Germany, Russia 2, Russia 24, My Planet and MTV 3. In the Netherlands, a 50% - 50% co-financing campaign with the two largest tourism operators in the Netherlands was realized on the 7 most-watched televisions in the Netherlands and in the most-read print media in the Netherlands. Also, promotion of Macedonia in Japan was made on the Travel Vision website and in the printed media Archeology Magazine and on their website too.

- **Promotion of the tourist potential of Macedonia through web pages:**
  - **macedonia-timeless.com**

In 2014, the site of the Agency for Promotion and Support of Tourism in the Republic of Macedonia (APPT), [www.tourismmacedonia.gov.mk](http://www.tourismmacedonia.gov.mk), was developed. The web site is intended for all visitors who want to get acquainted with the beauty of the country, with the tourist potentials of the Republic of Macedonia, to download videos or images of tourism, the opportunity for the private sector to animate and promote to third markets. The website is constantly updated and translated into the following languages: English, Serbian, Bulgarian, Albanian, French, Italian, German and Spanish.

- **sharemacedonia.com**

For the realization of this campaign, a web site and social channels were created for the campaign. The project started with the determining and naming of the brand of Macedonia as a tourist destination. Afterwards, the design of the website and the logo [sharemacedonia.com](http://sharemacedonia.com) was determined. The website is a project where the tourist potential of Macedonia is promoted with the help of social networks.

- **tourismmacedonia.gov.mk**

In 2012, the site of the Agency was created - [www.tourismmacedonia.gov.mk](http://www.tourismmacedonia.gov.mk). The web site is intended for the Macedonian tourism sector in order to share the necessary information, legal acts, rulebooks, static data, the Macedonian tourist potential in foreign media and the possibility of registering e-mail addresses on which interested people can get new information about the tourism in the Republic of Macedonia. The site

www.tourismmacedonia.gov.mk was prepared in Macedonian and English for the subsequent communication with tourists from outside the country

- **GOOGLE campaign**

In order to implement the policies and undertaking appropriate measures in relation to increase the number of foreign visitors, primarily tourists in the Republic, the realization of a project for increasing the awareness of the foreign population for the attractiveness of the Republic of Macedonia as a tourist destination started.

In order to implement the project, the following countries were included:

Serbia, Bulgaria, Albania, Kosovo, Croatia, Slovenia, Greece, Germany, France, Italy, Austria, Belgium, Sweden, Poland, Czech Republic, Slovakia, England, USA.

The promotion was through 2 channels on Google: Search and Display.

The total number of visits to the website is 1,564,347 visits.

- **Realization of a media campaign for promotion from 2010-2015**

- ❖ The Agency for Promotion and Support of Tourism in 2015 realized a media campaign (printed and electronic media and billboards) in the following countries: Bulgaria, Serbia, Albania, Kosovo and France.
- ❖ Agency for Promotion and Support of Tourism in 2014 implemented the media campaign (print and electronic media and billboards) in the following countries: Bulgaria, Slovenia, Serbia, Sweden, Poland, Croatia, Albania, Kosovo and France.
- ❖ The Agency for Promotion and Support of Tourism in 2013 realized a media campaign (printed and electronic media and billboards) in the following countries: Bulgaria, Slovenia, Serbia, Sweden, Poland, Croatia, Albania and Kosovo.
- ❖ The Agency for Promotion and Support of Tourism in 2011 realized a media campaign (printed and electronic media and billboards) in the following countries: Serbia and Spain.

- ❖ The Agency for Promotion and Support of Tourism realized a media campaign (printed and electronic media and billboards) in 2010 in the following countries: Belgium, Serbia, Italy - guide on Italian language, CNBC - monthly magazine for European businesses, National Geographic and Billboard campaign in (Albania, Serbia, Bulgaria, Slovenia and Kosovo).
- **Organized informative trips to the Agency for Promotion and Support of Tourism from 2009 to 2015**
  - ✓ During 2015, ALMP has organized seventeen info tours with journalists, producers and photographers (Russia, France, Serbia, America, Italy, Australia, Norway, United Arab Emirates) and twelve information tours for tour operators, travel agencies and travel associations (France, Sweden, Russia, America, Turkey, England, Finland). In total, 29 info tours were realized in 2015.
  - ✓ Informed tours realized in Macedonia for 2014, attended by journalists, producers and photographers, were held twenty (Germany, Kazakhstan, Japan, Denmark, the Netherlands, Sweden, France, Turkey, Serbia, America, China). Tour operators, Travel Agencies and Tourist Associations are eleven in total (Bahrain, the UK, the Czech Republic, the Netherlands, Azerbaijan, Austria, France, Russia, Bulgaria, America, China, Italy). In total, 33 info tours were realized in 2014.
  - ✓ Organized info tours for 2012 in which participated journalists, producers and photographers were two, from Germany and Japan, while for tour operators, travel associations and travel agencies it was seventeen from the Netherlands, Japan, Serbia, Turkey, Qatar, Poland, Russia, Ukraine, Slovenia, Sweden, France, Germany. In 2012, a total of 19 information was organized.
  - ✓ For 2011, two information tours were organized by the ALMP in which took part journalists, producers and photographers from Finland, England and nine infotours in which participated Tour Operators, travel agencies and travel associations from India, Poland, Albania, Croatia, Russia, USA, Spain. In total, nine info tours were organized in 2011.

- ✓ In 2010, two information tours were provided to journalists, tour operators and photographers from Finland, the Czech Republic and seven info tours around Macedonia for tour operators, travel associations and travel agencies from the Netherlands, Russia, China, Turkey, Japan, Finland, Germany. In total, nine informative events were organized in 2010.
- ✓ The number of informative tours organized by the ALMP in Macedonia in 2009, featuring journalists, producers and photographers, is six of the following countries: England, Germany, Turkey, Japan, Russia, Croatia. Two info tours are provided for tour operators, travel agencies and travel associations from Germany and Bulgaria. The total number of organized information tours for 2009 is eight.
- **The number of international tourism fairs attended by Macedonia from 2010 to 2015:**
  - ❖ In 2015, ALPT participated in 14 international tourism fairs in: "Vakantiebeurs" - the Netherlands, "EMITT" - Turkey, "IFT - Serbia", ITB - Germany, "MATKA" - Finland, "Brussels Holiday Fair" - Belgium, HOLIDAY & SPA EXPO "- Bulgaria," Mitt "- Russia," JATA "- Japan," TUR "- Sweden," RDA "- Germany / Cologne," TOP RESA "- France," TTG "- Italy / Rimini and "WTM" - London.
  - ❖ In 2014 ALPT participated in 16 international tourism fairs in: "Vakantiebeurs" - the Netherlands, "EMITT" - Turkey, "IFT - Serbia", ITB - Germany, "MATKA" - Finland, "Brussels Holiday Fair" - Belgium, HOLIDAY & SPA EXPO "- Bulgaria," Mitt "- Russia," JATA "- Japan," TUR "- Sweden," IFT "- Serbia," WTM "- London," Tour Salon "- Poland," TTR "- Romania," Bit "- Italy and "Travel Turkey Izmir" - Turkey.
  - ❖ In 2013, ALPT participated in 17 international tourism fairs in: "Vakantiebeurs" - Netherlands, "EMITT" - Turkey, "IFT - Serbia", ITB - Germany, "MATKA" - Finland, "ITM Warsaw" - Poland, "Brussels Holiday fair" - Belgium," Bit "- Italy," HOLIDAY & SPA EXPO "- Bulgaria," Mitt "- Russia," JATA "- Japan," TUR "- Sweden," Tour Salon "- Poland," CITM " Skopje Travel Market - Macedonia.

- ❖ In 2012, ALPT participated in 7 international tourism fairs in: "Vakantiebeurs" - the Netherlands, "EMITT" - Turkey, "IFT - Serbia", ITB - Germany, "MATKA" - Finland, Camping - Germany and "Travel Turkey Izmir" - Turkey.
- ❖ In 2011, ALPT participated in 8 international tourism fairs in: "Vakantiebeurs" - Netherlands, EMITT - Turkey, "IFT - Serbia", ITB - Germany, "MATKA" - Finland, Kosovo, Slovenia and Düsseldorf, Germany.
- ❖ In 2010, ALPT participated in 7 international tourism fairs in: "Vakantiebeurs" - Netherlands, "EMITT" -Turkey, "IFT-Serbia", ITB-Germany, Kosovo, Slovenia and Tel Aviv, Israel.

- **Organizing a tourism fair in Ohrid**

The fair was organized in Ohrid in the period from 17-19 January for the great Orthodox Holiday Epiphany. The fair presented the traditional Macedonian food and wine typical of each region in our country. Besides municipalities, the fair presented their stands and presentations and Gallica National Park, National Park Pelister, then Southwest Region, TAV (Airport St. Paul and Alexander the Great), Tourism Catering Chamber of Macedonia and Tourist Chamber of Macedonia. The fair was welcomed by tourism officials prior to the presenting of achievements and activities for the promotion of tourism and in front of the foreign tour operators the potential of tourist regions in Macedonia was presented.

- **Printed promotional materials**

- In 2015, the following promotional materials are printed: Guide to monasteries in the Republic of Macedonia in 5,000 copies and Guide through the Regions in the Republic of Macedonia in 5,000 copies.
- In 2014, the following promotional materials are printed: E-75 leaflet 400,000 pieces, Six Sets Brochures printed in the following languages: Bulgarian 12,000, Serbian 12,000, English 12,000, Albanian 12,000, Turkish 6,000, French 6,000, German 9,000, Russian 6,000, Japanese 6,000, Italian 6,000, Spanish 6,000.

- In 2013, the following promotional materials were printed: Lentok for E-75 1 million copies, Six Sense Brochures printed in the following languages: English 6,000, French 6,000, German 6,000, Italian 6,000, Russian 6,000, Turkish 6,000, Serbian 6,000, Bulgarian 6000, flyer 18.000 pieces, brochure for Galichnik Wedding 500, brochure 1000, printed bags 20.000 copies.
  - During 2012, ALMP printed the following promotional materials: My Macedonia - as a collection of all other topics described below, Country of Nature, Cradle of Culture, Attractions, Food and Wine, Traditional cultural events.
- **A Review has been made of the National Strategy for Tourism Development 2009-2013, with an action plan for 2011-2015**, in which an analysis of the tourism product is made and its importance for the development of the Republic and opportunities and challenges for further development of tourism were established.
  - **A Strategy for Development of Rural Tourism 2012-2017** has been adopted, which is a comprehensive framework for the development of rural areas in Macedonia and improvement of the quality of life of the population in these areas.
  - **Substances for tourism development, prepared and adopted are:**
    - Sub-strategy for development of sports tourism with an action plan 2015-2018;
    - Sub-strategy for the development of MICE (congress) tourism;
    - Sub-strategy for traditions and events in the Republic of Macedonia; And
    - Supportive tourism for active tourism.

For the purpose of greater development opportunity and enrichment of the tourist offer of the Republic of Macedonia in various segments of tourist valorization, developed 3 sub-strategies for development of special forms of tourism.

- **Paragliding tourism**



The project is being realized in cooperation with USAID. Two flying places in Prilep and Krushevo have been established as the centers from which the paragliders and the most famous places in the country are taking off for this purpose. And two fleets of Popova Shapka and Galicica should be arranged, according to the same example.

- **Project "Flying in the nature"**

It stems from the Promotion Program for 2015 and purpouse the development of project documentation in the form of a basic project for the preparation of cableway descents, with the aim of creating new tourist products within the tourism sector. Project documentation for the National Park Mavrovo was developed, while contacts and interest were expressed for the project realization in Skopje in the municipality of Karpos.

- **Project "Stock Market for Tourist Workers"**

The project aims to register all unemployed professionals in the field of tourism, distributed by regions and municipalities. As part of these commitments, several meetings with the Employment Agency were made, where they use the database that has the level of the entire state. On the official website of the Agency for Promotion and Support of Tourism, [www.tourismmacedonia.gov.mk](http://www.tourismmacedonia.gov.mk), a link was named with the name of the Tourist Workers' Exchange, which is directly linked to the Employment Agency and there is a possibility to see all the unemployed people in the field of Tourism. This project is intended for all employers who want to invest in tourism in order to have an insight into qualified personnel according to the location where they want to open catering facilities.

- **Project "Ottoman monuments"**

The project stems from the Agency's Work Program and was aimed at collecting data on cultural monuments built by the Ottoman Empire. Monuments that have special tourist significance were selected, visited, recorded and photographs were made which were then used to create the CD material that was shared at the Istanbul tourism fair, as well as interested parties and travel agencies.

- **Project "Macedonian Tourist Passport"**

The project consists of two parts: printed version - brochure and mobile version - mobile application. Within the passport, the tourist potentials of the Republic of Macedonia are divided into regions. For each region the most important tourist locations are extracted and the booklet has photos and text and link to our website which is richer in information and "QR" codes as a link to the platforms Play Store and App Store where it can be downloaded and a mobile version of the passport in application form. The mobile application is an animation platform that will aim to animate the tourist while staying in the Republic of Macedonia. Through a "GPS" signal, the mobile application itself will tell you what's nearby, with appropriate photos and text, as well as a direction to get there. Once it reaches the specified location, the tourist is offered the opportunity to check but also make a selfie-photography and attach it to the personal Facebook profile, which in this case replaces the entire operation when the printed version is inserted and data on the visited locations.

- **Project "Mountain Paths"**

The project stems from the Program of the Government program for the promotion of 2015 and 2016. This project covers the mapping of 184 paths or 3900 km of total. They are realized by 55 mountaineering associations, as well as their arrangement and marking of existing and creating new mountaineering paths. Up to now, 40 paths have been prepared, which so far misses only setting up of the info boards and then closing the project with the IPARD Agency, while 136 paths are ready for 60-80%.

- **Project "Mountain bike paths"**

The project is derived from the Program of the Government of the Republic of Macedonia and the Program for Promotion from 2015. This project covers the arrangement and marking of 80 mountain biking trails. So far only their mapping has been done and the data for the same paths have been collected. It will be fully completed by 2016-2017.

- **Project "Improvement of the conditions for accommodation in mountaineering and hunting lodges / houses"**

According to the Program for Promotion of 2015 for inclusion of mountaineering and hunting lodges in the tourist offer and creation of a network of facilities of this type, it envisaged a preparation of a study for 20 objects for this purpose. Within the pilot project, renovation of some of the facilities will be carried out in the course of 2016.

- **Project "Monastery tourism"**

The project is derived from the Program of the Government of the Republic of Macedonia and the Program for Promotion from 2015. The purpose of the project is to record significant monasteries in the country that are in function of tourism, to connect them to the monasteries in the Republic of Macedonia, especially those offering accommodation conditions, then making a website for the same, mapping and printing promotional materials for religious and monastery tourism.

- **Project "Active tourism"**

This project is implemented in cooperation with the Association for Active Tourism and USAID, and within it will be organized the Summit for Active Tourism in the Republic of Macedonia. Preparatory activities are in the final stage and the regional summit will be held in Ohrid from 10-12 May 2016.

- **Project "Evidence of tourist potentials in the Republic of Macedonia"**

This project is also in the final phase where research and recording of the tourist potentials in the planning regions in the Republic of Macedonia have been carried out, which have and offer conditions for tourism development, and further the project should be placed on the agency's website as well as printing promotional material.

- **Project "Marking of recognizable products objects, objects, events"**

The project encompasses collecting data on products of localities, objects, events of tourist significance, which will create conditions for defining tourist brands that are characteristic for the Republic of Macedonia. The project will be further developed by

the fact that these brands will be used for the promotion of tourism for which it is necessary to develop promotional material for them, as well as publishing the website of the Agency entitled "Do You Know".

- **Project "Mapping the Via Egnatia Road"**

The project encompasses mapping, arranging and marking of the Roman Via Egnatia road. Mapping for the same is underway and is carried out by a special working group led by the Cultural Heritage Directorate. Then it will be need to edit the same path, install the signs for the same, as well as making a printed and e-Guide or brochures for it. The project will be fully realized in 2016.

- **Project "National Taverns-Meani"**

In the course of 2015, catering facilities have been subsidized for obtaining a designation National Restaurant-Meani, by co-financing up to 60% of the proven costs but not more than 120,000 denars for procurement of equipment and inventory, arrangement of the business space, printing of promotional material and participation training of employees.

Namely, in order to get this designation, the catering facility needs to be arranged in a national setting, with national music, at least 70% of the dishes are domestic specialties, then the offer of wine and other alcoholic and non-alcoholic drinks in the wine maps of the national restaurants should be in a ratio of at least 80% domestic compared with international wines and other beverages.

- **Marking of tourist trails through the bazaars**

The tourist routes in the Old Bazaar, Ohrid and Bitola bazaars are marked with information boards and signposts. Financial support is envisaged for cultural, entertainment, sports, gastronomic and ecological manifestations. The project includes co-financing of some of the funds for organizing well-known local events in order to enrich the tourist offer in the Republic of Macedonia. In 2014, funds were provided in the amount of 1.000.000 denars, while for 2015, funds were provided in a total amount of 1.400.000 denars.

- **Formation of auto camps**

In 2013, a special Law on auto camps was adopted, where the main goal was to arrange, mark and categorize the car cabs in the Republic of Macedonia. In addition to the establishment and arrangement of the existing auto camps, the Agency also launched an initiative for the creation of new caravans in accordance with the legal competencies, and activities for the formation of auto-pumps in the municipalities of Struga, Demir Kapija and Petrovec started.

- **Amendments were made to the Law on Tourism**, which comprehensively elaborated the normative part in the field of tourism; the requirements and needs of the participants in the tourism industry were incorporated and harmonized with the EU directives.

- **The amendments are by-laws from the Law on Tourism, in the direction of:**

- Increase in the standards and norms in the accommodation facilities such as hotels, motels, boarding houses, tourist apartments and residences and camps for obtaining a certain category / star especially for obtaining a category of a larger character like 4 and 5 stars, for improving the quality of accommodation services and consumer protection;
- The conditions and standards for operation of licensed catering facilities such as cabaret, nightclub and disco club have been improved, which stipulate the fulfillment of minimum standards for operation of these facilities;
- Categorization of hunting and mountaineering homes throughout the country, thus providing an opportunity to improve the work and increase the services they provide in these facilities.

- **According to the Law on catering activity, a Rulebook on the conditions for obtaining the right to use the designation National restaurant – Meana** has been brought, which determines the criteria for obtaining this mark and the rights

and obligations of the users of the label of the National restaurant - Meana and the Rulebook on the conditions for obtaining the right to use the designation rural place.

Changes and amendments to the **Law on catering activity** have been made, which made it possible to improve the quality of services in the catering sector and increase the protection of consumer rights.

The project for **marking (signaling) of tourist places along the corridors 10 and 8 (2011-2012)** contains over 300 information boards on all major tourist, cultural and historical sites, 10 information boards of 300/200 cm in corridors 10 and 8 and 30 signs on the regional roads in the Republic of Macedonia, which significantly improved the quality of touristic signalization.

- **Aqua-Park Project – Skopje**

Within the Boris Trajkovski Sports Center, on an area of 12,000 square meters 10 slides were built, as well as swimming pool for children, swimming pool with waves, "lazy river", locker rooms and accompanying catering facilities. The Aqua Park was opened in July 2013, which made the city of Skopje a real summer attraction following the example of the world's metropolises.

- **Beach – Dojran Project**

The realization of this project significantly increased the attractiveness of the Dojran Lake as a tourist summer destination. AD ELEM has invested approximately 26.8 million MKD in construction works, beach equipment and construction of a pontoon harbor for the construction and arrangement of the beach in Star Dojran. The beach, which was put into use in summer 2013, is one of the most urbanized beaches in the Republic of Macedonia and undoubtedly the most beautiful beach on the shores of the Dojran Lake. The beach also has its own parking space and a children's corner. The beach is a new tourist offer in the Republic of Macedonia and is especially important for the Dojran region due to domestic and transit tourists.

- **Ski center Kopanki, Pelister**

In 2011 AD ELEM has started with the investment activities for restarting the work of this ski center. A replacement of the transport rope of the two-seat ropeway "Begova cesma" as well as a complete repair of the electrical equipment has been made, the transport baskets were modernized and the pillars and pillar places were completely serviced. So, seven years after, in the winter season 2011/2012, the two-seat ropeway "Begova cesma" was put into operation again. The ropeway is 700 meters long and has a load capacity of 400 skiers per hour. In 2012 and 2013, a revitalization of the ski lift "Kopanki" was made, so 15 years later, this ski lift was restarted. With the commissioning of the ski center Kopanki after years of break, the skiing event "Pelister veleslalom" was resurrected in the winter of 2012, which continued the tradition of competitions. A basic project for construction of water reservoirs for the production of artificial snow has also been made.

- **Snowboard park in the ski center Krushevo**

With the support of the Government and within the framework of the program for social responsibility, AD MEPSO donated funds for expanding the offer and continuation of the ski season in the ski center Krushevo. Two ski trails were illuminated, equipment for production of artificial snow were purchased and installed, a vehicle for the preparation of the ski trails (snow track) as well as a ski-sledge for the needs of the rescue service, were purchased. Props for acrobatic skiing on a plank were purchased and installed for the needs of the snowboard park, which started functioning within the ski center Krushevo. The project was fully realized in 2013 and AD MEPSO invested 1.5 million Euros in it.

- **Snowboard park was built within the ski center Ponikva**

With the support of the Government, AD MEPSO donated funds for the construction of a snowboard park, which expanded the offer and the attractiveness of the Ski Center Ponikva. Within the project, two ski trails were illuminated, equipment for production of

artificial snow was purchased and installed, a vehicle for the preparation of the ski trails (snow track) as well as a ski-sledge for the needs of the rescue service, have been purchased. Props for acrobatic skiing on a plank were purchased and installed for the needs of the snowboard park. This project, worth 1.1 million euros, was realized in 2013.

- **Ski center Popova Shapka Project**

The first phase of the three planned phases for construction and modernization of the ski resort Popova Shapka started in accordance with the master plan development study. AD ELEM started with investments for construction of a new six - seater ropeway with a length of 1.420 m and an initial capacity for transporting skiers up to 2,400 skiers per hour, which will increase the capacity of transported skiers per hour, from the current 1,750 up to 3,150 people and the length of the ski trail up to 18 km (80 ha). The new ropeway will be put into operation in the winter season 2016/2017. Within this phase is the project for construction of a parking lot with a capacity of 350 vehicles, lighting and access road, which will overcome the problems that the tourists of Popova Shapka faced up till now. To provide conditions for a longer ski season, as part of this phase is the construction of a snow system. In order to improve the quality of accommodation in this center, AD ELEM is developing a project for construction of a new spa hotel on the place "Slavia" on Popova Shapka, with a categorization of four stars.

- **Construction of ski trails on mountain locations in Republic of Macedonia project** (Berovo Lake, Golak and Plachkovica) in cooperation with the municipalities of Berovo, Delcevo and Radovich. In mid-September 2014, the basic projects and technical documentation for the construction of the ski trails near Berovo Lake and the Golak and Plachkovica mountains were submitted. These projects are implemented in cooperation with the municipalities of Berovo, Delcevo and Radovich.



- **Project for practicability study and master plan for development of ski center on Jablanica mountain** through Public Private Partnership. In order to enlarge the tourist offer in the region and create conditions for local economic development and support of the private initiative, AD MEPSO has started with the development of practicability study and master plan for development of the ski center on Jablanica mountain.
- **Project for practicability study and master plan for development of ski center in the National Park Galichica.** With the funds of AD MEPSO a practicability study and a master plan for development of the ski center in the National Park Galichica is developed. AD MEPSO participates in the promotion of the project (there were two calls for expressing interest but no offers were submitted) and if a private partner is found, the ski center will be built as a direct investment, concession or through a public private partnership. The value of the study is 195,000 euros, and the documentation was prepared in May 2014.<sup>29</sup>

The above-mentioned projects by the state aim to help in the development of tourism, in enlarging the offer, but also in promoting the beauties of our country.

The effects of these development projects which were/are implemented in the period 2005-2015 are partially measurable, their true reflection can be analyzed in the future.

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<sup>29</sup> More information at: Agency for Promotion and Support of Tourism, <http://www.tourismmacedonia.gov.mk/>, last accessed on July 15, 2016

## 5. CONCLUSIONS

The concluding observations that we have come to this book point to the fact that tourism is a contemporary phenomenon, and the role of the state for the development, support and promotion of tourism has a significant impact on the economic development. The development of tourism would enable a more complete economic valorization of the natural potentials and would contribute to the acceleration of the overall economic development. The phenomenon of tourism arises from the growing mass of participants in it, the specifics that it possesses and the organizational setup.

It is designated as the lifestyle of most of the world's population. The economic accomplishments have this activity as a "tourist industry". The tourist arrangement, in turn, is the most important product that the travel agency creates on the market. The process of creating the arrangement is a result of the organizational function of the travel agency, more precisely it covers the various activities, preparation, organization, sale and performance of organized trips. By its internal structure, the tourist arrangement is a combination of services for a larger number of different participants in the tourism industry. Based on the tourism development and the involvement of numerous branches and activities, different vocations are specified, which act in this activity. They have an immediate role in the running of the work process. Successful performance of the work of differentiated vocations depends on the correct approach in their shaping. This is the reason why tourism attracts special attention among the expert and scientific public.

The scientific and academic approach is based on research that has a fundamental character. The unity of these findings is a necessity in the elaboration of tourism issues. Although conditions in the world and in the analyzed country as a consequence of the economic crisis and transition processes are highly complex, so in the countries that aspire to revive the economic development and improvement of social relations, tourism can become an activity of priority.

Therefore, activities are undertaken at home and abroad. Some of them, as subsidizing foreign visas, tax incentives and self-employment projects, are already giving results.

Thus, the possibilities for using the pre-accession of the opened European Union funds, where the selectivity of tourism development has a special place.

The realized revenues in macedonian tourism for the period 2011-2015 analyzed in this book, indicate a factor which conditions the increase in the share of GDP of this sector in the total GDP of the country, multiplying the financial effects, involving different sectors and branches in this activity or acceleration of the economy, promoting economic cooperation, impact on the balanced economic development, introduction of entrepreneurial spirit and stimulation of opening new, small and medium enterprises and stimulation of employment, especially for the young population.

In the direction of promotion of Macedonian tourism, were realized numerous projects and activities, which contributed to the country being a more attractive tourist destination in the past years.

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