

First International Fair for Tourism and Tourist
Business Forum

Final Document of the workshops held on the
Business Forum

Ohrid, January, 19, 2008

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Conclusions of the fourth workshop themed: Cultural heritage through centuries – Macedonia and the Balkan countries

- The creation of the tourist product will be realized through identification of its elements support given by all involved and distributing on the market as a mutual regional product.
- A coordinative mechanism – body to be founded; the members being all participants involved in the development and presentation of the cultural tourist product. It is necessary to have support and conscious arise of the heritage holders.
- Approaching the process of concretization and creation of the tourist product that will be thematically defined in a wider regional context having in mind the common specifications of the Balkan cultural heritage.
- In order to create a tourist product based on the cultural heritage it is an imperative that it should be put under the process of conservation in advance and presented by relevant institutions, as well as building a strategy for using the objects for tourism purposes, thus having incorporated the needs of all interested parties.
- The religious communities to foresee their interest by being actively involved in the process of the cultural tourism development; thus they should offer adequate strategy for tourist usage of their objects..
- We support and initiate the Ministry of culture activities through the Department for protection of the cultural heritage for increasing the number of the monuments of culture that will be presented to the tourists. In the process of the tourist usage of the cultural heritage a plan should be implemented for managing the cultural heritage, having the accent on the local community involvement. .
- Preparing a tourist guide with all relevant information needed for the tourist development.
- It is suggested the issuing of tourist guide's IDs by the Ministry of Economy and at the same time to accelerate the control over the tourist guide's activities..
- To initiate a series of workshops for all engaged parties and thus to upgrade the experiences from the first workshop and pilot projects can be offered that will treat the regional tourist product.

Religious Monuments

The tables list some of the most important of the numerous religious monuments in the country, consisting of Christian churches and monasteries and Islamic mosques. These reflect the rich history of the Republic of Macedonia.

○ Churches

	Church	Location	Interpretation
1	Sv. Arhangel Mihail	Stip	-
2	Sv. Atanasij	Resen	√
3	Sv. Dimitrija	Bitola	-
4	Sv. Jovan Kaneo	Ohrid	√
5	Sv. Naum	Ohrid	√
6	Sv. Gjogjija	Kurbinovo	-
7	Sv. Gjorgija	Staro Nagoricane	-
8	Sv. Bogorodica	Debar	-
9	Sv. Bogorodica	Veljusa, Stumica	√
10	Sv. Spas	Skopje	√
11	Sv. Leontij	Strumica	√
12	Sv. Pantelejmon	Nerezi, Skopje	-
13	Sv. Pantelejmon	Ohrid	-
14	Sv. Sofija	Ohrid	√
15	Sv. Kliment	Plaosnik, Ohrid	√
16	Sv. Stefan	Ohrid	√

Source: Ministry of Culture, Macedonian Orthodox Church, Municipality of Ohrid

○ Mosques

	Mosque	Location	Interpretation
17	Jeni	Bitola	-
18	Ajdar Kadi	Bitola	-
19	Imaret	Struga	-
20	Arabati Baba Teke	Tetovo	√
21	Painted mosque	Tetovo	-
22	Kurshumli An	Skopje	√
23	Sultan Muratova mosque	Skopje	-
24	Mustafa Pashina	Skopje	-
25	Jahja Pashina	Skopje	-
26	Cifte Amam	Skopje	-

Source: Ministry of Culture, Macedonian Orthodox Church, Municipality of Ohrid

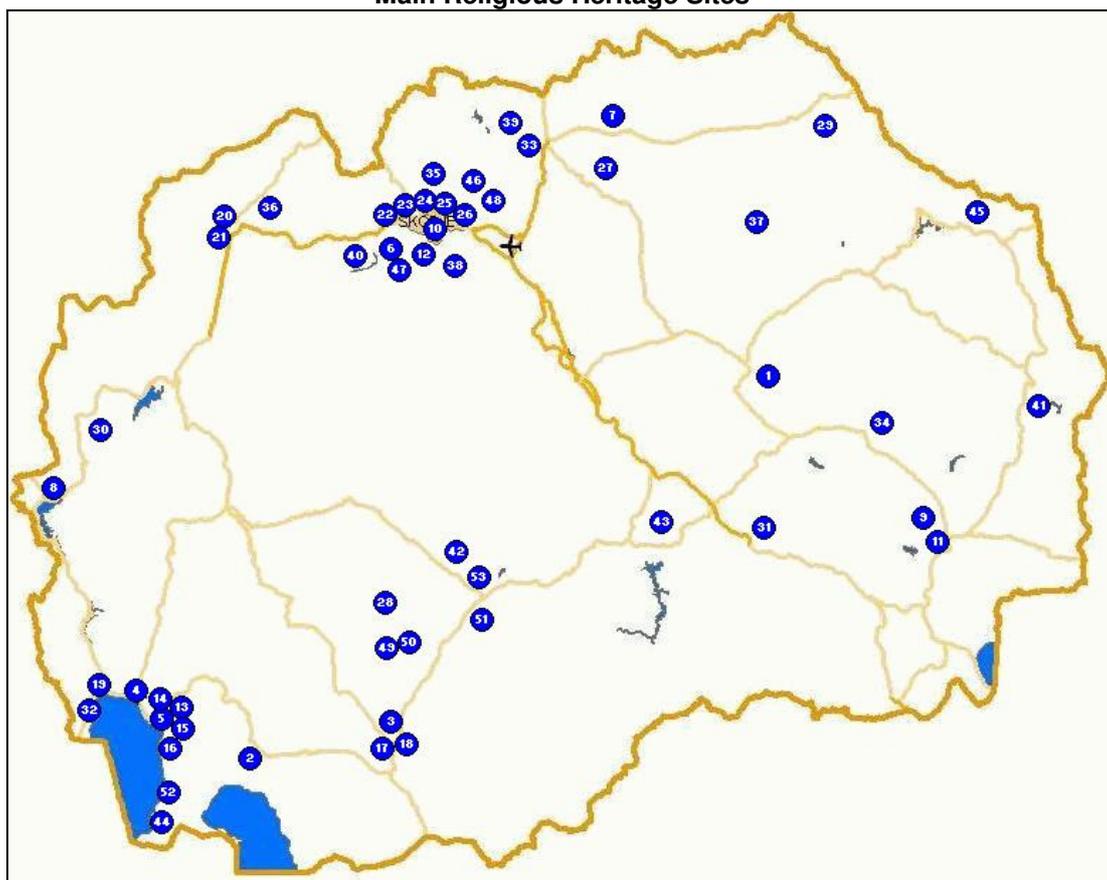
○ Monasteries

	Monastery	Location	Accommodation
27	Deljakovce	Kumanovo	-
28	Djurche	Krusevo	√
29	Joakim Osogovski	Kriva Palanka	√
30	Jovan Bigorski	Mavrovo	√
31	Sv. Gjorgija	Negotino	√
32	Kalishta	Struga	-
33	Karpino	Kumanovo	√
34	Konce	Radovis	√

35	Kuceviste	Skopje	-
36	Leshok	Tetovo	√
37	Lesново	Probistip	√
38	Markov manastir	Skopje	√
39	Matejce	Kumanovo	-
40	Matka	Skopje	-
41	Sv. Arhangel Mihail	Berovo	√
42	Sv. Arhangel Mihail	Prilep	√
43	Mokliski	Kavadarci	-
44	Sv. Naum	Ohrid	√
45	Sv. Nikola	Kriva Palanka	-
46	Sv. Nikola	Skopje	-
47	Sv. Pantelejmon	Skopje	√
48	Pobudze	Skopje	√
49	Slepche	Demir Hisar	√
50	Slimnica	Demir Hisar	-
51	Treskavec	Prilep	√
52	Sv. Zaum	Ohrid	-
53	Zrze	Prilep	√

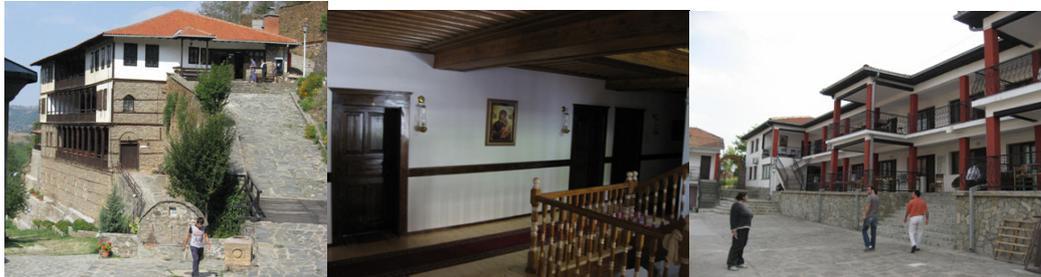
Source: Ministry of Culture, Macedonian Orthodox Church, Municipality of Ohrid

Main Religious Heritage Sites



The religious facilities in Macedonia are owned and managed by the respective religious communities. They are open for visitors but as there are no separate times (from Mass times) for tourist's visits there is frequently a mingling of the ones who came to see the history and culture and the others who came to pray.

Interpretation is generally missing, if there is one it is usually written in Macedonian, or Albanian except in the case of Ohrid. The interpretation is bad; the tourist can not make a clear picture of its importance and the story behind it. The interpretation can only be given by a guide, who should be contacted in advance. Some of the churches and monasteries ask for an entrance fee from foreign tourists.



Some of the monasteries offer accommodation, which varies a lot in the standards and type of services. In some of it the tourists are pretty independent and can use the kitchen, have their own bathroom, but in others you are practically part of the monks' life for the duration of their stay. The potential for monastery accommodation is high but is not always recognised as such by the responsible episcope.

Monasteries Offering Tourist Accommodation

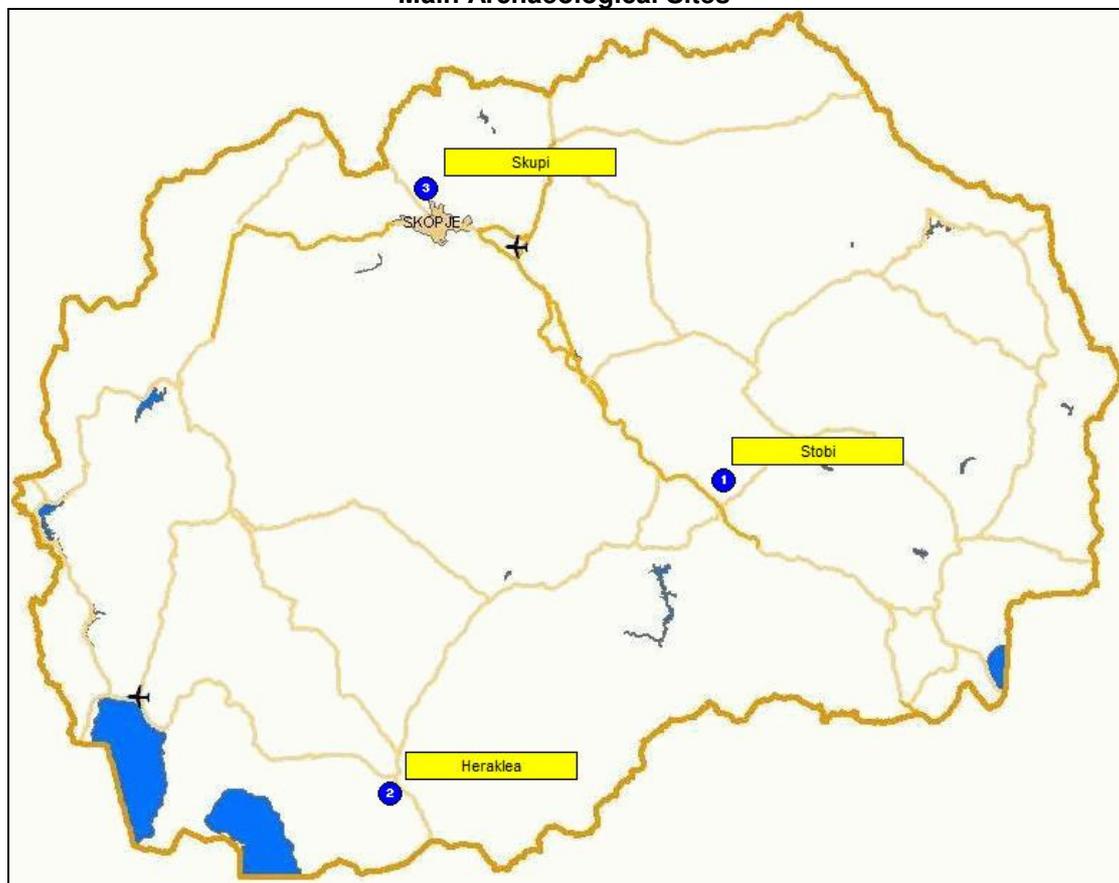


Archaeological sites

	Site	Location	Manager	Signage	Interpretation	Guiding
1	Stobi	Near Negotino	Ministry of Culture, STOBI archaeological site	√	√	-

2	Heraclea	Bitola	Ministry of Culture, Museum of Bitola	√	√	√
3	Skupi	Skopje	Ministry of Culture, Museum of Macedonia	-	-	-

Main Archaeological Sites



Other main heritage attractions

Site	Location	Manager	Signage	Interpretation	Guiding
Markovi Kuli	Prilep	-	√	-	-
Samoilova Tvrđina	Ohrid	Museum of Ohrid	√	√	√
Skopsko Kale	Skopje	The city of Skopje	√	√	√
Marvinci	Gevgelija	-	-	-	√
Vinicko kale	Vinica	Municipality of Vinica	√	-	-
Stara carsija	Skopje	The city of Skopje	√	√	√

Both the archaeological sites and other heritage attractions lack interpretation and this is the greatest problem for potential tourists. There is rarely a map or guide to lead visitors through the sites. If there is one, more often it is twenty or more years old. In some cases the responsibility for site management is not clear, the sites not secured, as well as not being properly conserved.

Museums and Galleries

There are many museums and galleries in Macedonia. Some contain important and interesting artifacts and exhibits. However, with a few exceptions, the displays are dull and uninformative, lacking enlightening interpretation or animation of any kind. To add to this the lighting within the museums and galleries is poor. There are also many reported incidents of visitors finding the museum and gallery doors closed and no indication of opening times.

Museums	Location
Military Museum	Skopje
People's Museum	Ohrid
Museum of Bitola	Bitola
Museum of Strumica	Strumica
Historical Museum	Krusevo
Ilinden Uprising Museum	Krusevo
Museum of the town of Negotino	Negotino
Museum of the city of Skopje	Skopje
Museum of Macedonia	Skopje
Museum of contemporary arts	Skopje
Museum of Tetovo region	Tetovo
Museum-Galler of Kavadarci	Kavadarci
People's Museum	Sveti Nikole
People's Museum	Gevgelija
People's Museum	Veles
People's Museum Nikola Nezlobinski	Struga
National Museum	Kumanovo
National Museum	Prilep
Nature Science Museum	Skopje
ASNOM Museum	Pelince, Kumanovo

Galleries	Location
AnaGor	Skopje
Anina	Skopje
Antika	Bitola
Antiko	Skopje
ARS	Bitola
Art House	Skopje
Atelje Atanas Dudam	Ohrid
Marijak	Skopje
Bezisten	Stip
Bezisten	Skopje
Bukefal	Struga, Skopje, Ohrid
RA	Skopje
Gral	Skopje
Daut Pashin Amam	Skopje
Drvo Art	Skopje
Dudidko	Skopje
El Greko	Skopje
Impresija	Skopje
IN	Skopje

J'NO	Ohrid
Kasver-C	Skopje
Kodeks VM	Skopje
Kulturno Informativen Centar	Skopje
Leonardo	Skopje
Momir	Ohrid
Lotrek	Struga
Monet	Skopje
Osojnica	Vinica
Pinokio	Stip
Sv. Kiril i Metodij	Bitola
Temenida	Bitola
Jeni Dzamija	Bitola
Cifte Amam	Skopje
Dzani	Kocani
City Art Gallery	Kumanovo

○ **Culture Tourism and Handicrafts**

The responsibility for the preservation and enhancement of cultural events, activities and artefacts lies with the ministry responsible for culture and other cultural related authorities. It is not the responsibility of the tourism sector. Tourism has a responsibility to ensure the cultural treasures of the country are not damaged in any way by tourism activities.

However, tourism can have a significant impact on the survival and enhancement of cultural activities and products through providing an additional income source and through providing a platform and audience for the presentation and exhibition of cultural performances and artefacts as well as participation in cultural activities. There is also a responsibility on the tourism organisers to ensure that the experience being offered to the visitor is authentic and of quality.

Existing festivals and performing arts events will have an existing domestic audience and support. Initially the NTO should identify festivals and events that could be considered to be of interest to foreign tourists for inclusion in a published calendar of events. In addition efforts should be made to facilitate partnerships between the organisers of such events with commercial tourism promoters and tour operators. The grouping of a series of events in a circuit or as being complementary to one another will facilitate packaging for a more complete visitor experience.

○ **Traditional Crafts**

The following is a range of crafts that have a potential as souvenirs and that could be incorporated into the proposed Craft Centres where craft making is on public view and the crafts are for sale to the public.

Woodcarving and icon painting

Woodcarving is one of the older handicrafts with a deeply rooted tradition. The existence of a number of woodcarvers' guilds around the Republic of Macedonia confirms that it is still a live craft.

Weaving

Weaving (carpets, covers and other) and in this context, the traditional wool processing (spinning, rolling etc.) is an important part of the local traditions. However, while the tools for weaving are still in existence in many households the actual weaving is very rare as industrial products have overtaken traditional methods.

Pottery

Pottery is a craft that exists in many regions of the country and has not been totally overtaken by industrial production. With the existence of some societies and associations this craft sector has good potential for development within and outside the craft centres.

Wood Carving

Wood Carving is still strong as a handcraft particularly in the private sector with small-scale workshops. Some of these workshops might be highlighted and assisted with promotion provided they showcase the actual making of the products as a visitor experience and attraction.

Barrels

Although barrel making was more widely present in the past, it still persists in our times even in the present condition of its decreased production range. The traditional quality and the recognised characteristics of this type of handiwork still persist. There are a considerable number of workshops, which still make products of this kind.

This type of craftsmanship is mainly characterised by commercial objects, mainly used in the production and storage of alcoholic beverages (barrels etc.), and those used as souvenirs, and have their own representative look.

It is expected that some of these products will be promoted in the domain of souvenir making or in the production of locally recognisable packaging for local products such as honey, alcoholic beverages, etc.

The visitors' appreciation of handicraft products is greatly enhanced if they can observe the making process. A pilot Craft Centre situated initially in one of the main tourism centres should be considered where craftsmen are invited to come and practice their craft with the produce on sale in the centre. The centre should be a retail outlet for other crafts people and where quality is promoted and test marketing is ongoing. Depending on the suitability of the premises, locating the Craft Centre in the Tourist Information Centre would have benefits for both.

The culture and crafts of the country can contribute to brand building of the destination. It is proposed that craft and cultural images be used in the marketing materials for Macedonia. In summary the recommendations are to:

- Position cultural activities and products to gain from tourism
- Produce an annual calendar of festival and cultural events
- Support partnerships between cultural outlets and tourism organisations
- Coordinate cultural experiences and activities to provide a more complete visitor experience
- Focus on quality and authenticity
- Initially select small number of model craft projects as pilots
- Use arts and cultural images in marketing

○ **Improved Interpretation of Heritage Attractions**

The wealth of cultural and natural attractions and assets is evident. However, very few can be easily appreciated as descriptions and interpretation of their content and relevance is largely absent unless the visitor is fortunate enough to find a good guide.

Museums, archaeological sites, heritage and religious, attractions, show caves, national parks and nature reserves and so on need to develop their communication with their visitors. This will result in a more gratifying visitor experience, encourage longer stays and greater spend. In different ways they all need to adopt the precepts of:

- Welcome
- Orientation, and
- Interpretation

The Welcome aspect refers assistance in finding the attraction though the provision of details of location and opening hours on publicity material and actual sign posts to the site. It includes the personal, or at least signed, welcome on arrival.

Orientation involves ensuring the visitor can find their way round the site, museum, church, etc. and find all the salient elements. Signs and simple maps or floor plans are often sufficient for this.

Interpretation is often the greatest challenge. The days when a tour guide would escort all visitors round a heritage attraction are long past. Far more visitors are independent and there are language barriers to overcome. Today's visitor wants to be mentally enriched, but is unlikely to appreciate an academic lecture. The trend is to education with entertainment. Various techniques can be adopted from simple multi-lingual descriptive leaflets (often highlighting the "must see" elements) to audio guides.

It is recommended that the custodians of heritage sites seek assistance in adopting the techniques most appropriate for their circumstances and that the NTO with NGO assistance organises seminars to outline the options and methods of implementation to curators.

Conclusion of the second workshop themed: Macedonia as a tourist destination

- Alexander the Great – the most recognizable; a symbol of the general image of the Republic of Macedonia in wider international dimensions.
- Necessity of an intensive aggressive promotion..
- Tourism in the Republic of Macedonia to be managed by professionals and competent personalities, on state, regional and destination level.
- The air transport in the republic of Macedonia is directed as one of the biggest problems for an extensive tourist development.
- Religious tourism as a great developmental potential.
- Active marketing and promotion of the Macedonian tourism, with selective products which completely match the needs of the specific market segments.

Winter sports

The table below details the locations of the ski resorts, trail assessments and organisers.

Name/Location	Ski Trail	Ski Lift	Organiser
Mavrovo 1	Easy	√	Zare Lazarevski Club
Mavrovo 2	Easy	√	Zare Lazarevski Club
Mavrovo 3	Easy	√	Zare Lazarevski Club
Mavrovo 4	Medium	√	Zare Lazarevski Club
Mavrovo 5	Medium	√	Zare Lazarevski Club
Mavrovo 6	Medium	√	Zare Lazarevski Club
Mavrovo 7	Difficult	√	Zare Lazarevski Club
Mavrovo 8	Difficult	√	Zare Lazarevski Club
Popova Shapka 1	Easy	√	PK Ljuboten, Tetovo
Popova Shapka 2	Easy	√	PK Ljuboten, Tetovo
Popova Shapka 3	Medium	√	PK Ljuboten, Tetovo
Popova Shapka 4	Difficult	√	PK Ljuboten, Tetovo
Popova Shapka 5	Difficult	√	PK Ljuboten, Tetovo
Krusevo 1	Easy	√	AD Ilinden, Krusevo
Krusevo 2	Medium	√	AD Ilinden, Krusevo
Strezevo, Pelister	Easy	√	JP Strezevo, Bitola
Nizepole, Pelister	Medium	√	JP Strezevo, Bitola
Begova Cesma, Pelister	Medium	√	JP Strezevo, Bitola
Mavrovo	Snow Board	√	Snow Board Association
Sapka, Tetovo	Snow Board	√	Snow Board Association

The three most popular winter sports resorts for domestic and regional tourists are currently Popova Shapka, Pelister and Mavrovo. The former experienced damage to ski lifts and its reputation as a result of the Kosovo conflict and has been in decline. There are 20 kilometres of ski runs at Popova Shapka and 7 kilometres at Mavrovo with all levels of slope difficulty available. Because of their elevation their seasons are normally relatively long.

Both Popova and Mavrova have a good range of hotel, apartment and private accommodation and are reasonably accessible from their local airports – Skopje and

Ohrid respectively. Pelister is within easy reach of the accommodation and other facilities in Bitola. Both accommodation and ski pass rates are competitive. Provided attractive air transport can be provided through charters and/or low cost airlines there is good potential to attract foreign ski business. Mavrova is privately owned and is a positive example for other ski resorts.

Ownership, maintenance and inadequate investment are problems hindering development and growth.

Snow-boarding is a new winter sport activity introduced in the last 5 years and still managed and organized by an NGO.

Promotional activity currently concentrates on the domestic market.

Hiking/Biking

Hiking and biking activities are organised and managed by NGOs, local governments or national parks. Most of the existing trails are well marked, but the interpretation is lacking.

Trail	Hiking/ Biking	Location	Length	Signage	Interpretation
Asan Djura	Hiking	NP Galicica	15 km	√	√
Galicica	Biking	NP Galicica	23 km	√	-
Golema Livada-Kopanki	Hiking	NP Pelister	3 km	√	-
Kopanki-Pelisterski oci	Hiking	NP Pelister	12 km	√	√
Rotino-children trail	Hiking	NP Pelister	2 km	√	√
Brajcino-Pelisterski oci	Hiking	NP Pelister	15 km	√	√
Trebiste-Lokuvski ezera	Hiking	NP Mavrovo	6 km	√	-
Rostuse-Duf	Hiking	Near NP Mavrovo	3 km	√	√
Galicnik-Jance	Biking	NP Mavrovo	6 km	-	-
Mavrovo-Bogdevo-Trnica	Biking	Near NP Mavrovo	40 km	√	-
Elen skok-Selce-Tresonce	Biking/Hiking	Near NP Mavrovo	25 km	√	-
Boskov most-Jama	Biking	Near NP Mavrovo	23 km	√	-
Berovsko ezero	Biking/Hiking	Berovo	18 km	√	√

The investment in these tracks is mainly through different donors and is not providing adequate resources for long term management and maintenance of the trails. Participation of local government in the process of maintenance of existing trails and building new ones is still incidental. The potential to organise more trails is large, especially if it is planned to combine it as one tourism product.

Extreme sports

Extreme sports are a rather new activity, still managed and operated by groups of enthusiasts in clubs or NGOs as local government involvement is incidental. The following is a listing of activities available with their locations and organisers.

Name/Location	Activity	Organiser
Crna reka	Rafting	NGO "Transverzalec", Gostivar
Otmarova karpa, Matka	Rock Climbing	Sport Climbing Association, Skopje
Centrala, Matka	Rock Climbing	Sport Climbing Association, Skopje
Pier, Matka	Rock Climbing	Sport Climbing Association, Skopje
Dom, Matka	Rock Climbing	Sport Climbing Association, Skopje
Matkino trlo, Matka	Rock Climbing	Sport Climbing Association, Skopje
Via Feratte, Demir Kapija	Rock Climbing	Sport Climbing Association, Skopje
Radar Petra, Demir Kapija	Rock Climbing	Sport Climbing Association, Skopje
Arena, Demir Kapija	Rock Climbing	Sport Climbing Association, Skopje
Kifla Rak, Demir Kapija	Rock Climbing	Sport Climbing Association, Skopje
Kaneo, Ohrid	Rock Climbing	Sport Climbing Association, Skopje
Trpejca, Ohrid	Rock Climbing	Sport Climbing Association, Skopje
Sv. Nikola, Ohrid	Rock Climbing	Sport Climbing Association, Skopje
Zli Dol, Ohrid	Rock Climbing	Sport Climbing Association, Skopje
Ploca, Stip	Rock Climbing	Sport Climbing Association, Skopje
Magarevo, Bitola	Rock Climbing	Sport Climbing Association, Skopje
Treska ,Skopje	Kayaking	Sport Association Skopje, Skopje
Radika, Mavrovo	Kayaking	Sport Association Skopje, Skopje
Ljilacica, Veles	Paragliding	Vertigo, Skopje
Krusevo	Paragliding	Vertigo, Skopje
Ohrid	Paragliding	Vertigo, Skopje
Pelister, Bitola	Paragliding	Vertigo, Skopje
Ajvatovci, Skopje	Paragliding	Vertigo, Skopje
Karadzica, Skopje	Extreme biking	XMKD, Skopje

Source: Association of Extreme Sports and responsive NGOs

The tourism offer for extreme sports is low and is available mainly to local tourists-enthusiasts rather than as a commercially organised offer for potential tourists.

Paragliding is a new activity offered, whereas Kayaking is a traditional activity of sport associations in Skopje and it is also offered to tourists. It is a well equipped and organised activity, especially in the spring and autumn season in the region of Treska River and Radika River.

Rafting and rock climbing are new activities organised by the Sport Climbing Association of Skopje. There are monthly programmed tours both for members and tourists.

There are excellent conditions for gliding and also pilot training facilities at sports airfields such as Stenkovec.

Hunting

The total number of hunters visiting Macedonia probably does not exceed 1,000 a year. However, this is a highly lucrative market segment with expenditure directly related to hunting exceeding Euros 2,000 per person on average.

Hunting Site Location	Type of Wild Game
Dojran	Wild boar
Bogoslovec	Birds
Katlanovo	Pheasant
Mazdraca, Sar Planina	Wild boar, wild goat
Brezovec, Bistra	Wild boar
Jasen	Wild boar, wild goat
Polaki	Wild boar, wild goat

Source: Master Plan for Tourism, Louis Berger 2003

Although there are some 45 hunting associations there are relatively few organisations actively marketing hunting abroad. These include the major private operator Micei, the National Parks Authority and Forests. Marketing is undertaken through websites and by networking. Operators also have links with a number of specialist hunting tour operators. There is also participation in a number of exhibitions in Europe with specialist hunting sections, either on tour operator stands, or independently.

Day rates for hunters are around Euro 200 for accommodation and facilities. To these have to be added trophy fees. These are competitive regionally.

The carrying capacity of the hunting areas far exceeds the current game population and there is much potential to expand the numbers of hunters provided game numbers are increased. As identified in the Ministry of Agriculture, Forestry and Water Economy's Strategy for Sustainable Development of Forestry there is a need to introduce a reproduction centre for the breeding of additional endemic species in order to repopulate hunting areas.

Support for the marketing of hunting is also required to enable visitor numbers to increase to a level where income is sufficient to maintain a high profile annual promotional programme.

Rural Tourism

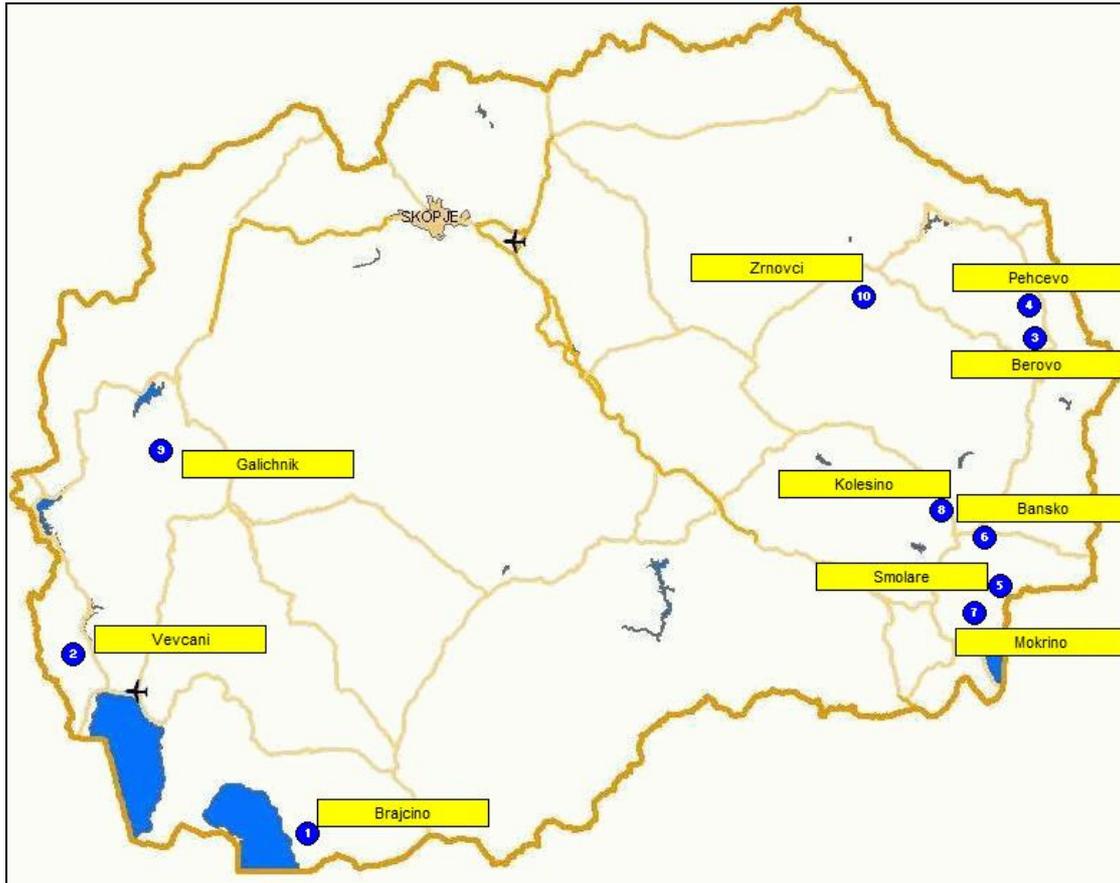
Rural tourism is a new activity for Macedonia. As part of the nature conservation and environmental protection some attempts have been made to enhance it.

Existing Rural Tourism Locations

	Location	Accommodation	Catering	Trails	Sightseeing
1	Brajcino	√	√	√	√
2	Vevcani	√	√	√	√
3	Berovo	√	√	√	√
4	Pehcevo	√	√	-	-
5	Smolare	-	√	√	-
6	Bansko	√	√	-	√
7	Mokrino	-	√	√	√
8	Kolesino	-	√	√	√
9	Galichnik	√	√	√	√
10	Zrnovci	√	√	√	√

Source: SOROS and responsive municipalities

Main Rural Tourism Areas



The only “fully” organised rural tourism village is the village of Brajcino, where accommodation, catering, trails and activities are established. Another village, Zrnovci is planned to be similarly organised in the future. There are a lot of attractions and trails organised in the Malesevoja (Pehcevo, Berovo) with accommodation and catering, as well as attractions and catering only in the Belasica area (Kolesino, BANSKO, Mokrino, Smolare).

The attractive nature of the western Mountains and long history and tradition has been only been interpreted in Galichnik so far. There is far more potential.

The village of Vevcani is another good example of organised trails and attractions, as well as accommodation and catering, but it is again as the previous examples an isolated short tourism product.

There is a need to connect a number of areas in order to offer at least a one week product with different activities and to package these for the market

Conference Facilities

The Republic of Macedonia has a very limited range of commercial conference facilities. There is no large scale purpose-built conference centre in the country. A number of venues are capable of handling large scale meetings, principally in Skopje.

The Skopje Fair can accommodate up to 5,000 persons and has 3,546 theatre style seats. In addition it has two other rooms seating around 150 theatre style.

The majority of conference facilities are in hotels with Skopje's Alexander Palace having the largest room seating 1,400. There is, however, not capacity to hold break out sessions for a thousand delegates without re-configuring the main hall and catering for large numbers is also difficult. This situation is replicated in the other major hotel venues both in Skopje and Ohrid.

Conference capacity of hotels in Skopje

Hotel	Accommodation facilities	Biggest rooms capacity and style	Breakout Rooms Theatre Style Capacity
Holiday Inn	163 rooms 15 apartments	700 theatre	7 rooms 20 - 450 seats
Alexander Palace	135 rooms	1.400 theatre	5 rooms 20 - 500 seats
Continental	194 rooms 6 apartments	1.000	2 rooms 50 - 400 seats
Karposh	59 double rooms 5 apartments	60 theatre	2 rooms 10 - 40 seats
Best Western	75 double rooms	100 cocktail	3 rooms 20 - 120 seats

Source: Tourism sector, Local authority Skopje

Conference capacity of hotels in Ohrid and Struga

Hotel	Accommodation facilities	Biggest room capacity and style	Breakout Rooms Theatre Style Capacity
Metropol	1 president apartment 5 apartments 200 rooms	500 Theatre	5 rooms 50 – 450 seats
Belvi	19 apartments 180 rooms	300 Theatre	2 rooms 100 – 200 seats
Granit	6 apartments 227 double rooms	250 Theatre	
Ineks Gorica	5 VIP apartments 150 rooms	450 Theatre	3 rooms 20 – 100 seats
Donco	8 apartments 50 rooms	250 Theatre	1 room – 35 seats
Drim - Struga	1 apartment 199 rooms	350 Theatre	6 rooms – 50 – 250 seats

Source: Tourism sector, Local authority Ohrid

The main hotels provide modern meeting equipment including simultaneous translation faculties.

Many hotels outside the two main centres offer small conference facilities, such as Molika - Bitola, Sirius - Strumica, Bistra - Mavrovo, Ambassador - Skopje, Sileks, Riviera or Millennium Palace - Ohrid, etc.

The hotel conference facilities in Ohrid and Struga are particularly important as means of attracting off-peak business.

The meeting facility provision is currently geared very much to the domestic market, with some regional meetings also being attracted. There is a lack of consolidated data on conference venues from which meeting planners can select destinations and which might be used for promotional purposes.

During and after the EU accession phase there will be increasing opportunities for The Republic of Macedonia to attract regional and international conferences. There will be opportunities for additional meeting venues offering main meeting rooms in the 250-1000 seat range with plentiful break out rooms with a similar capacity in total and also ability to cater to these numbers in other parts of the same venue.

Tourist Information Centres and Tour Guides

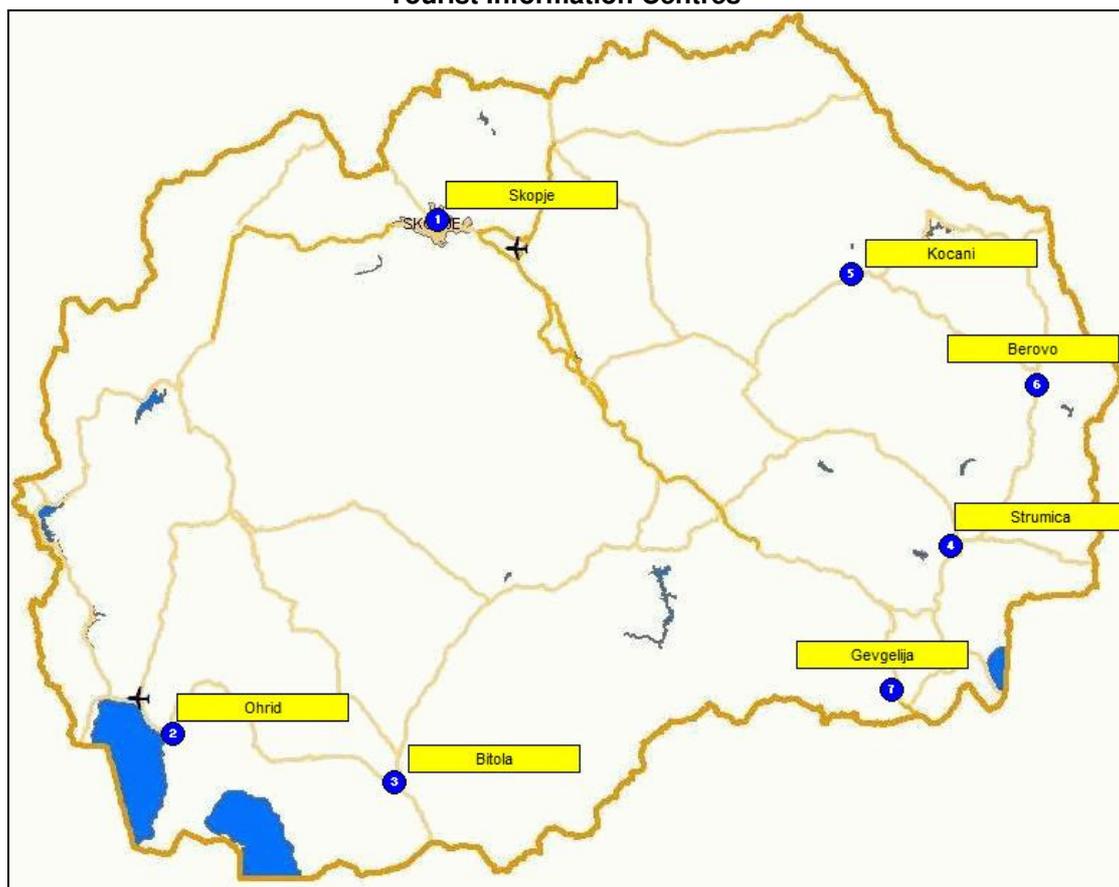


Internationally, the role of Tourist Information Centres is to provide information to visitors on the local and regional and national tourism facilities, attractions, accommodation and services and to reserve accommodation, car hire, tours etc. In many instances they charge for these services as well as collecting commissions and selling tourist maps, publications and souvenirs.

Tourist Information Centres in the Republic of Macedonia

	Name/Location	Ownership/management	Working hours	Souvenirs	Maps	Guides Offered	Accommodation Bookings
1	TIC, Skopje	Tourism Association of Skopje, (NGO)	Not operating at present				
2	TIC "Lihnidos", Ohrid	Municipality of Ohrid	9-21	√	√	√	√
3	TIC, Bitola	Municipality of Bitola/"Centar za kulturna sorabotka" (NGO)	10-18	-	√	-	√
4	TIC, Strumica	Municipality of Strumica / "Aquila Aurea Makedonika" (NGO)	10-20	√	√	-	√
5	TIC, Osogovo, Kocani	Municipalities in the Osogovo region, GTZ project	08.30-16.30 (weekdays only)	√	√	-	√
6	TIC, Berovo, Berovo	Municipality of Berovo, UNDP / Finland project	10-14 (weekdays only)	√	√	-	√
7	TIC, Gevgelija	Apollonia Casino UNDP/ Finland project	08-24 June-September	√	√	-	√

Tourist Information Centres



Most of the tourist information centres have appropriate working hours, except the ones in Berovo and Kocani, which are not open at the weekends, when most tourist arrivals are expected. Only Ohrid offers tour guides through the information centre. The centres in Ohrid and Bitola offer information on car hire.

Information about accommodation and catering as well as museums/ theatres/ galleries is provided everywhere, but only Bitola has the possibility to arrange accommodation (reservations).

Iconic Products

Unlike many countries (France with the Eiffel Tower, Italy with the Coliseum, etc.) the Republic of Macedonia does not have a single iconic product or attraction with which the country is associated. It is clearly not practicable to create an iconic attraction, which would rank with such high profile tourism magnets as exist elsewhere. Nor indeed would it be appropriate to develop, for example, a massive Alexander the Great theme park to vie with Disney World, as this would not align with the scale and intimacy of the country's intrinsic character and appeal.

The two key strengths of Macedonia as a tourism destination are its Cultural and Natural Heritage. It is possible to develop a number of small to medium scale iconic products that link in with these heritage assets. These can be used to attract media attention and develop an awareness that Macedonia, albeit a small country, has a range of special and interesting attractions. In addition to those mentioned below other potential products will surface as tourism is being developed.

Lake Ohrid is already designated a World Heritage Site by UNESCO. This identifies it as being in the top league of the world's attractions, yet not much promotional use has been made of this accolade. It is recommended that additional World Heritage Site status awards are actively sought for other tourism "products", and that they are used to spearhead the destination image building activity.

The Markovi Kuli at Prilep has been proposed as a World Heritage Site and identified for special attention in the National Development Plan. Prilep already has other (though under developed) tourist attractions such as its Tobacco Museum and the Treskavec and St Michael Archangel monasteries. It is also strategically placed near the Corridor VIII route. A World Heritage Site accolade could greatly assist in putting Prilep on the tourism map and help create an additional centre for tourism.

A similar strategy is recommended for the north east of the country, which currently has a number of uncoordinated tourist attractions and appeals. There is debate about the NASA claim that Kokino is a significant pre-historic observatory. Certainly the use of the site as an observatory is not evident to the casual visitor and it would need considerable interpretation to become a major tourist attraction. However, pursuing a claim for international recognition would in itself generate publicity and interest in the area.



Kokino

The Neolithic site at Cocev Kamen is more impressive offering a range of visual appeals and sense of drama to visitors. There are claims that it contains the oldest theatre in the world. That is something to bring to the world's attention. It is clearly a unique destination with great tourism potential, which could be best fostered by focussing the spotlight of World Heritage Site status on it.



Cocev Kamen

The Republic of Macedonia is rightly proud of being the birthplace of Mother Theresa and this is reflected in a small museum, statue and demarcation of her birthplace. Far more benefit could be drawn from this association if, instead of simply identifying the location of her birthplace, the house were re-built on the spot and devoted to an inspirational portrayal of her life and works and legacy.

Iconic Natural Heritage attractions can be more difficult to develop as they have potential environmental implications. Also the uniqueness of the natural attractions can often be of minority appeal. However, the Republic of Macedonia does have a unique natural asset that could be developed for tourism with limited environmental impact and possibly greater conservation potential. That is its concentration of butterfly species, said to be the greatest in Europe. In a number of countries Butterfly Farms have become a sustainable combination of visitor attraction and research and breeding establishments for butterflies. It is recommended that consideration be given to such a development in the Lake Prespa / Galicica National Park area, which could be of significant interest to visitors to the south west lake area and in transit along Corridor VIII.

One of the unsung benefits of the Republic of Macedonia is the availability of organically produced food. Intensive farming techniques introduced in order to increase the quantity of production may threaten to reduce the organic sector. There is an increasing demand in Western Europe for organically produced foodstuffs, a demand which far exceeds supply. This is an opportunity for Macedonia's agricultural sector where large scale production is often difficult to achieve.

The relevance of this to tourism is that the appeal of the destination would be greatly enhanced if it can position itself as an organic destination offering high quality, locally produced organic foodstuffs, particularly in its rural tourism sector. It is consequently recommended that the ministries of Economy and Agriculture collaborate to develop the organic food sector. Positioning Macedonia as a "green" tourism destination may be a major challenge but one worth giving serious consideration.

○ **National Parks**

The National Parks large potential for tourism activities is not fully exploited. There is small number of activities developed in comparison to the potential. Pelister National Park has developed a tourism related business plan and is already seeing the benefits from its organisation of tourism activities such as hiking. The other National Parks should follow this example. There is a need to upgrade the mountain huts and also workers' and children's accommodation in the national parks.

The Prespa Park region, which has significant tourism potential and is considered as an ecosystem of global significance. However the system is being eroded through human activities. There are a number of tourism projects underway in the region that will improve the natural heritage in the region. Cross border implementation on an integrated basis is vital to its future

○ **Rural Tourism**

Although there is already much tourism in rural areas, only one rural tourism destination – Brajcino – can be said to be currently "operational". Brajcino is an excellent example of the challenges that need to be overcome, the benefits resulting and on-going requirement for publicity and efficient operations. Other potential rural tourism locations have been identified and development is proceeding - Zrnovci, Pehcevo, Berovo, Kolesino, Bansko, Mokrino, Smolare, Vevcani and Galichnik.

These projects will need municipality and NGO support. They will also require joint publicity through the NTO in respect of joint promotional material, website publicity and media and operator visits.

○ **Develop Spa Tourism for Domestic and Regional Markets**

The Republic of Macedonia's spas are mostly located in attractive, scenic locations. Perhaps as a consequence access is not always easy. Although in a few cases improvements are being made the overall quality of treatment and accommodation facilities is very low. Spas are required shortly to decide whether they wish to be classified as treatment centres in the medical sector or as tourist facilities.

It is well known that spa tourism is a rapidly growing sector of tourism. The Republic of Macedonia has to determine whether it can provide an internationally competitive spa product.

An initial assessment is that there is limited potential to compete in the international spa, wellness, health and beauty market. This requires easily accessible locations with four and five star resort hotels offering a wide range of spa, health and beauty treatments. There is intense competition for the market from destinations with arguably better natural resources in terms of water benefits, gas and mud treatments.

Consequently it is recommended that the spa sector in Macedonia should concentrate on its local and regional market developing its facilities to a good three star level – with some four star accommodation. The spa offer itself should also be re-presented as a health rather than medical facility, emphasising invigoration, wellness and preventive benefits not just cures.

○ **Camping and Caravan Sites-Total Refurbish for Domestic and Regional**

The vast majority of existing camping and caravan sites need total refurbishment and adaptation both for the domestic and for the regional market. The basic accommodation units, as well as the whole establishment infrastructure need to be improved with a completely new modern concept of a campsite. Consideration should be given to adopting the popular Western European concept of tented campsites rather than the current caravan accommodation. Without major investment the current sites do not meet European standards and cannot hope to attract that market.

Given the scenic locations of some campsites consideration might be given to conversion into permanent self-catering units in a well designed and well spaced park environment.

Further research to re-assess the market for camping and caravan tourists is needed in order to select the most profitable and sustainable choice for the future of the existing ones.

○ **Hunting**

Hunting represents a potentially lucrative area for tourism development. There are three clear lines of action that need to be taken:

- Stricter implementation of legislation to decrease illegal hunting
- Increase in the stock of game through the development of one or more reproduction centres
- More targeted marketing of the hunting offer once game stocks are adequate

○ **Conference Market**

There is currently a healthy demand for small to medium sized conference facilities with modern equipment for a range of domestic and regional meeting formats. These are catered for in the main hotels mostly in Skopje and Lake Ohrid, but also in some other regional venues. Many of the venues outside the capital look to the meetings market as a means of generating valuable off-season business.

There is no directory of available conference venues, which can be promoted to domestic, regional and foreign meeting planners and consequently the Republic of Macedonia does not enjoy the image of a competitive conference destination.

As integration with the European Union approaches there will be many more meetings, seminars and training course held in the Republic of Macedonia. The country will also have the opportunity to bid for more international meetings of varying sizes. Although it may be tempting to build a major national conference centre to cater for these potential governmental, non-governmental and corporate events, the market potential and, in particular, the configuration of large and small meeting rooms, catering and other facilities required should be researched in advance.

It is therefore recommended that the NTO:

- Compile a directory of existing conference venues with full details of seating capacities in various configurations, equipment, floor plans and ancillary accommodation for promotion regionally and domestically in hard copy and through ExploringMacedonia.com
- Commission a study into the potential for a national conference centre, its optimum location and configuration together with funding options.

○ **Improved Destination Management Companies**

Despite there being over 180 travel operators licensed to offer inbound operations there are only half a dozen active in this type of activity. This makes it difficult for the country to capitalise on the relatively large number of specialist foreign operators, who might be interested in Macedonia's product offer. The skills of destination management companies are largely acquired through practical experience, so it is not easy to increase their number.

To assist the current destination management companies to expand their current operations and encourage new companies to enter the market it is recommended that the NTO research potential foreign operators to identify individual contacts. It should then facilitate negotiations between them and Macedonia destination management companies by organising familiarisation visits to Macedonia and assisting DMCs make contact both through participation at a selective number of travel exhibitions where pre determined appointments can be made and also by staging sales missions to foreign operators' own offices.

Conclusions of the third workshop themed: Wine trails in the Republic of Macedonia

- There is a need for founding a National Agency or an association which can connect the wine cellars and will manage the problems that are of concern to all involved subjects.
- To support the promotion of wine production and its consumption by organizing wine fair, preparation of brochures, catalogues and all other forms of promotional material..
- Involving a greater level the organs of local management in the affirmation of the wine cellars that exist in those communities.
- Offering support for connecting the wine trails on a state level and their integration in the regional map of the wine trails.

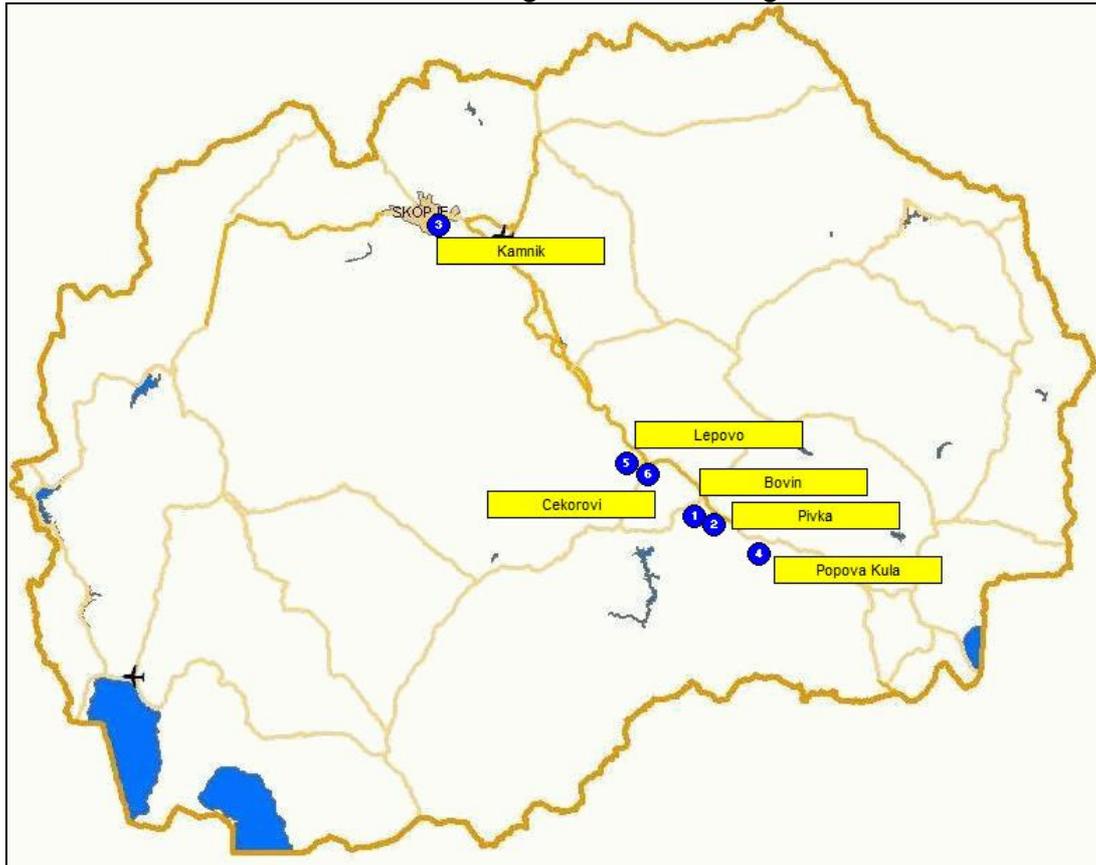
Wine Tourism

There are some 54 commercial wineries in the Republic of Macedonia. A number of these are starting to offer wine tasting and other services on a formal basis for visitors in order to promote their brands and direct sales.

	Location	Accommodation	Catering	Tastings
1	Bovin, Negotino	-	√	√
2	Pivka, Negotino	-	-	√
	Fonko, Negotino			
3	Kamnik, Skopje	√	√	√
	Elenovi, Demir Kapija			
4	Popova Kula, Demir Kapija	√	√	√
5	Lepovo, Kavadarci	-	√	√
	Tikves, Kavadarci			
	Vadarska Dolina, Kavadarci			
6	Cekorovi			√
	Jostela, Gevgelija			

Source: Exploring Macedonia and Wine Association, Enology Club

Wineries Offering Tours and Tastings



In the Republic of Macedonia wine tourism is very new product, as part of some other tourism offers, or as a day excursion. Wineries report that most visitor traffic is currently generated direct rather than through travel agencies and tour operators.

The offer consists of tasting different wines, tours in the production area, some history lessons, stories, as well as good traditional catering and shopping possibilities.

There is a need for the organisation of more accommodation facilities within the area, as well as the organisation of wine trails that will be connected into a cohesive product. The Tikvesh Wine Route Foundation is active in this area, but with limited resources.

○ Wine Tourism

Wine tourism is an emerging concept in the Republic of Macedonia developed principally by the Tikvesh Wine Route Foundation. This should be seen as a form of rural tourism with a wine theme. Apart from visits to wineries for tours of production facilities and tastings it should include a total immersion in the rural environment in a largely wine producing area. This means offering a menu of visitor options including scenic itineraries, activities such as walking, cultural visits, rural accommodation and cuisine as well as the winery aspects.

The Foundation is pursuing development of this menu of options, but will need additional assistance in aspects such as signposting and marketing. The wine tourism offer should be featured by destination management companies and as a separate rural tourism feature of Macedonia on the ExploringMacedonia.com website. The Tikves project can be replicated in other wine regions.

**Conclusions of the fourth workshop themed:
Regional connection and introduction of the managers and the
owners of the winter and summer tourist in the Region**

- The region is a firm foundation for cooperation among the different doers of the tourist offer and demand. As a problem emerges the short period of tourist stay which can be overcome by greater host animated engagement. Informing the guest about the total potentials that are offered in that region with possibility to get informative package at first entrance in the state. s
- There is a need of integration and cooperation of the tourist agencies in the trade of tourist services on the wholesale level.
- The problems of the consistent presentation on the tourist market have been identified: promotion of the Macedonian tourist values and the region. An absence of a mutual interest of the promotional activities has been defined, so as a conclusion it is imposed the intensifying of the promotional processes on national and regional level as a general promotion and opening a commercial promotion of a state support in these activities as well as creating a regional strategy for the tourist development. .
- It was concluded that in the hotel industry there is a shortage of qualified working force which can be solved out by greater engagement of the hotel employers by pointing out the advantages of being an employee in the hotel industry. It is necessary to equalize the quality of the services with the corresponding European categorization in the hotel industry, services, transport and trade engagement.
- Arising the consciousness of the population from the region in order to protect the environment, the hygienic conditions and environmental usage. In this direction the experiences exchange among the neighboring countries is needed..
- Engaging the global tour- operators to get to know the local and regional characteristics.
- A cooperation is inevitable between the higher educational institutions and the tourist sector.

Ohrid, January, 19, 2008