

Research and evaluation of the capacities of the municipalities Shtip, Kochani, Probishtip and Vinica, for development of activities connected to alternative tourism

Main goal of this research is to evaluate the capacity of the municipalities in the focus of this analysis, for development of activities initiated by institutions and citizens regarding the possibilities for alternative tourism development. The analysis and evaluation of capacity for development at a municipal level are based on: strategic documents for municipality development (strategy and development plans), statistic information and reports for 2015 (last available statistics) for demographic view, population mobility and work force, employment and unemployment in the municipality; for business activities and investments, NGO's presence, civil society associations, results of conducted researches, concepts and models for regional developments, as well as through gathering specific information through interviews with representatives from the local government, business sector, NGO sector, journalists, directors and/or high school teachers and representatives of different actors in the smaller populated places in the municipality.

1. General characteristics of the East region, with a special turn on the municipalities of interest

The municipalities Shtip, Kochani, Probishtip and Vinica, which are in the focus of this study, are part of the East region, taking 14,2% of the total territory of Macedonia. According to the statistics from 2015, 8,6% of the total population lives in this region. Although not very developed economically, this region still offers many possibilities because of the specific natural-geographic, climate and hydrologic characteristics. In this sense, the most known culture is the rise, and also fruits and vegetables. The mountain massifs are full of the metals lead and zinc, and the textile industry is the most present from the other industries. On the other side, although this region is geographically very suitable for development of mountain and alternative

tourism, the situation on field shows that the potential is not explored enough due to lack of infrastructure, roads etc, which makes these municipalities less attractive for domestic and foreign visitors.



Source: State statistical office, 2015

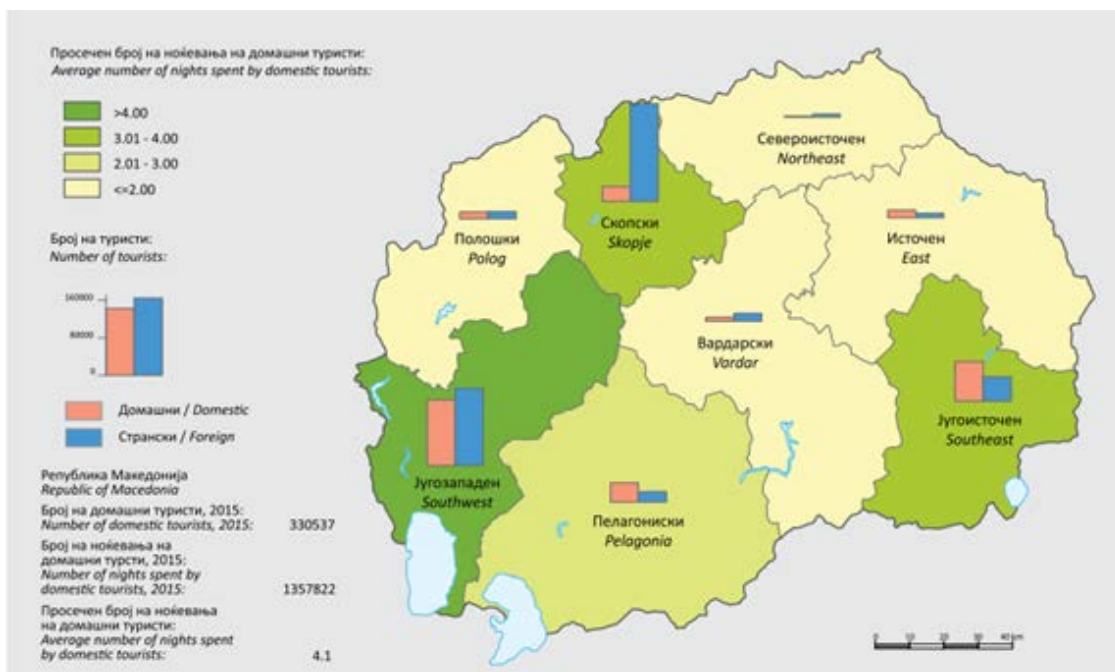
Table 1 shows certain indicators for determination of the potential for tourism development in the region. The positive characteristic of the region is that the literacy is very high, 96,1%. Out of the total population (62,5%) only 17,5% are unemployed. GDB per capita is 226,898 denars, which is close to the state average. The region is also characterized with a high number of active business subjects (5,692 including 2015). The average salary for that region is 16,278 denars (last calculated data for the region is from 2013).

Table 1: Chosen indicators

Literacy rate	Activity rate	Employment rate	Unemployment rate	Average net salary	Number of active business subjects (2015)	GDP per capita	Number of tourists
96.1	62.5	51.6	17.5	16,278	5,692	226,898	25,907

Source: State statistical office, 2015

However, the region is characterized with a very low touristic offer, which is visible from the picture bellow. Namely, the region is very little visited by foreign, as well as domestic tourists. Domestic tourists who visited this region stayed the longest 2 days, and it is a region where foreign tourists are less present than the domestic.



Source: State statistical office, 2015

The ministry of economics every 5 years issues a national strategy for development of all plan regions in the country. Thus, for the east plan region there is a program issued for the period of 2015-2019. One of the key segments for the east region is the development of the sector tourism through setting a frame for encouragement of the initiative for development of the overall offer within the sector for tourism in Macedonia. This is done through recording all the natural, cultural and historical localities, inventory of all touristic and restaurant capacities, and based on this is developed the regional strategy. Still, the strategy is only a starting point for development, and in the same time it is not obligatory for implementation. The last documents issued on the topic tourism are from 2016, when a study for the potential locations for development of traditional and alternative tourism was prepared.

In all strategic documents from the Ministry of economy and the Ministry for environment and physical planing, it is underlined the importance of tourism development. One of the key goals for the east region is for it to grow into a known touristic destination, which will offer selective and quality touristic products, first of all attractive for domestic tourists, and then to be included in the programs the regional touristic operators offer. Priority segments for development in the east region are the mountain, rural, cultural and thermal tourism, which then offer sub-products within the general group. Doing so, as a starting point for future development,

it is planned to improve the entire road and traffic infrastructure, especially if the goal is to pass on an international promotion of the touristic products.

More precise, priorities by municipalities are:

- Shtip – infrastructure development for promotion of the traditional tourism, micro touristic offer, better promotion, professional training, according to international standards, which will provide an introduction of innovation in the current touristic offer (thermal baths, restaurants, manifestations), increasing the alternative offer, as well as a development of the rural tourism.

- Kochani – using the main agricultural activity, the rise production, in developing the touristic offer.

- Vinica – Promotion materials for the current offer, promoting the traditional kitchen and the hand crafts as a quality touristic product and support for developing the rural tourism.

- Probishtip – support for developing the rural tourism.

From here begins the creating of the quality analysis questionnaire. Namely, there is a trend of creating studies for different purposes, which then the local actors don't use then, or in many cases, didn't know they existed. The questionnaires are created in a way so that the three key sectors for tourism development in the east region will give their own evaluation of the conditions, the current cooperation networks and will indicate the potential for future cooperation, in order to create a quality and diverse touristic offer, attractive for national and international promotion.

2. Introduction in the quality research

The research which includes analysis and interpretation of texts and interviews in order to give a logical explanation of a certain phenomenon is defined as a quality research (Auerbach and Silverstein, 2003). Main characteristic of the quality access provides generating a hypothesis based on the answers gathered from the interviews conducted with all stake holders, for a

specific question of the research. The quality component of this report is handling the analysis of data gathered via semi-structured interviews, conducted in 4 municipalities from the east region of Macedonia, separated into several subgroups: (1) business sector (with a turn on the sector tourism), (2) civil sector/education, (3) local government. The evaluation of development capacity is performed based on real facts and visions for the cooperation, relations and possibilities of the region, divided into several subgroups:

a. Potential of the business in the stated domains on the market, employees and work force mobility, connection with the professional high schools, cooperation with the local government and the civil sector (forms of support, ways of cooperation, etc), if they have any partnerships and with who, besides via the professional high schools, is there another way to provide qualification of staff, do they apply for European funds, do they participate in regional and national networks, are they familiar with the possibilities for border partnerships and cooperation.

b. Set up of an appropriate local government policy for tourism development, with a special turn on the possibilities for alternative tourism – priority in the plans for development, built mechanism to work with business and civil sector to stimulate activities connected to their development (for example: municipal council where participate representatives of the business and civil sector for creating solutions for improvement of the tourism situation, strategy to attract qualified personnel, media campaigns, shows for good practices in the local media, etc); what is the evaluation of the local government for developing the tourism sector, through traditional and alternative possibilities, provided by the business and civil sector.

c. Evaluation of the potential natural/cultural/historical resources, including unused traditional potentials for tourism development which are not used enough or at all – natural beauties and cultural-historical objects, infrastructure, human potential and other. Perception of potential segments for development, implemented as a result of the expert evaluation of the interviewees.

Based on these information (analysis of documents and interviews with representatives of the local government, business and civil sector, journalists, employees in the educational institutions), an evaluation is made for inclusion of potential resources, which are not enough used at the moment, but represent a potential for development and promotion of the

municipalities within the touristic map of Macedonia. In order to achieve a maximal objectivity of the evaluations, each interviewee in the subgroups will be asked for expert score of the potential and capacity of the other sectors, as well as for the segments where a bigger cooperation is needed.

The quality analysis is organized in the following way: first we present the goal of the research, following the methodology for the choice of interviewees, analysis of the answers and the last part presents the main findings and conclusions improving the touristic offer in the region.

2.1 Goals of the quality analysis

The goal of the quality analysis is to give answer to the questions connected to the potential for alternative tourism in the region, such as: Is there a strategy for tourism development and more precise to initiate a development of alternative tourism? Is there cooperation between the sectors in order to improve the situation of the tourism in the region? Is there an adequate professional training of the personnel in the field of tourism? Does the municipality initiate an entrepreneurship spirit in the field of alternative tourism? Which domains consider to be indicated as potential for creating a product that will be offered as alternative of the traditional offer in the tourism? What are the advantages and what are the obstacles for development of alternative tourism? What are the problems/ administrative obstacles they faced, which refer to the economical, social and cultural context in direction of alternative tourism development? To what degree and is the level of cooperation between the sectors and the local government influences the tourism development?

2.2 Determinate a sample and analysis of data

In the analysis are included 80 interviewees from different sectors (local government, education, civil sector, business sector, media) evenly grouped in all four municipalities included in the analysis (20 from each municipality). This division is made in order to get a more dimensional picture for the touristic offer and the alternative potential in the east region. All interviewees were interviewed by a researcher, in sessions of 30-40 minutes. The interviews were recorded with permission of each interviewee. After the interviews, the recordings are

transcript and adequately stored in computer files. During the analysis, it is taken attention to the privacy of the interviewees; they cannot be identified according the answers in any stage of the report. Once the report is finished, the recordings are deleted according the standards for conducting and interview for a quality analysis.

The questionnaire, presented in details in Attachment 1, is consisted of two parts: (i) general demographic questions of the interviewee, to confirm the sample is not subjective, or takes in consideration the differences which may appear as a result of age, gender, socio-economic difference. (ii) half-straight forward questions – regarding the topic alternative tourism development, obstacles and possibilities.

2.3 Analysis of the answers gathered from the half-structured interviews

In this part of the analysis are presented the findings gathered from the half-structured interviews, separated in three sub-groups (educational/civil sector, local government and business sector) In the sample there was a balanced participation by gender, in an age range from 23 to 56, from the four municipalities of interest, accordingly divided in reference of the subcategories defined in point 2.1.

2.3.1 Educational institutions and civil society organizations (NGO's)

In general, the interviewees from the education and civil sector consider that on a municipal level there is a certain cooperation between the sectors, but there is a lot of space for improvement. They think that the smallest cooperation is with the local government, averagely satisfying, while the best cooperation is with the media. The cooperation with the local government is connected with certain thematic projects, but there isn't a cooperation that can encourage projects development that will contribute to the growth and development of the municipality.

The answers from the education sector workers say that the cooperation is mostly directed towards:

„keeping the municipal protocols that are published, or to transmit the public information to the citizens“

while for the other projects they say:

„The municipality doesn't help us enough, should commit more to the schools because they are governed by the municipality and they are not enough engaged for their offer“.

From the civil sector, 90% of the interviewees answered they don't have any cooperation with the local government. Regarding the cooperation with the business sector, they say that the companies are more open for cooperation that can increase their profit, but still very limited from the *„legislative and penal policies towards that sector“*.

To the question „ What is for you tourism? “ most of the answers are connected to the traditional views of tourism, or promotion of the natural and cultural wealth, and accordingly to that the tourism development as a profitable domain. Part of the civil society organizations have participated in development of a strategic document for tourism and five year action program with priorities for development of the region, in order to improve the economical status of the population. The goal of that program is to contribute to development of cultural manifestations, improvement of the conditions with the cultural heritage, which would attract more domestic and foreign visitors. Still, part of the interviewees was not familiar with the existing document, but stated that the region is full of potential for development of traditional, but also alternative tourism.

Most of the interviewees, to the question „ What do you think is the degree of development of the tourism in your municipality? “ answered with a low degree of development, and only 30 % answered with satisfying. However, here it is also referred to the infrastructural problems they are facing, so they say that the degree of tourism development is adequate to the limited access, as result of the insufficiently developed road and railway infrastructure. But, they think that due to the closeness of the region to the Bulgarian border, as well as to the capital, there is a satisfying possibility for tourism development, if it the offer is differentiated and there is a promotion of the touristic offer over the border.

Most of the interviewees consider that accent should be put on development of the rural, mountain and thermal (spa) tourism, and in the same time, strengthen the connections with tour operators and agencies from abroad, which will promote the offer to their clients. They think that

even in limited conditions, the region already has an interesting touristic offer, lacking a better promotion:

„The cultural manifestations as Days of the rise, The balcon of Petrovden to be raised on a higher level, from the educational aspect, the other sectors can contribute differently to the question“;

„I think that the water potential should be more used, to open thermal pools and spa centers“.

Asked to give a score on the presence of adequately qualified work force for the development of the touristic sector, 60% of the interviewees consider that the work force is satisfying, 15% that it is good, and 25% think there are not enough qualified personnel. Here takes part also the availability of the specialized schools for tourism; in that region there is only one high school which offers a tourism department. But, all indicate the positive part of the civil sector; they think that the civil sector can play a key part in offering professional courses for interested individuals to be included in the sector tourism in the east region, in the four municipalities in the focus of this analysis:

„Normally, the civil sector is the 4th side of this whole development, they have personnel in the sense that the people working in the civil sector have visited a lot of trainings, they are educated and trained and can contribute in this sector and I think that the civil society organizations are already included in the development in this sector through realization of projects (national and international exchanges)“.

Still, everyone states that even though there is a potential for cooperation and improving the touristic offer, in practice there is a very small or insufficient initiative by the local government and the citizens together to develop the sector.

Part of the municipalities have already started activities for tourism development, part are also border cooperation with Bulgaria. Other cooperation stated by the civil society organizations is only in a phase of studies, but when it comes to realization, there is a lack of success. They say:

„most of the municipalities have parts, segments for development of the tourism... as an organization, we have documented a lot of touristic potentials, 12 road connections for development of attractive touristic areas, a complete project for Ponikva as a sport and recreative touristic center, covered with all necessary documents for water supply, canalization and access roads, parking places, cable cars, but the part for implementing the final realisation depends either of the municipality or some other institution, and I think that everybody should recongnise the tourism as an only way for development of our region specifically.“

Main activities being conducted are connected with the mountain tourism. The association Ponikva, and municipalities Probishtip and Kochani have formed a joint association and together they do promotion of the locality. Ethno house was opened and also other cultural manifestations under the patronage of the municipalities. Still, on the question: On a scale from 1-5, what is the quality and how maintainable are these activities in a long term?; the interviewees are a little reserved, middle score is 3 with a biggest fear of the maintainability in a long term. The thermal waters are indicated as main unused resource, making the parallel with Bulgaria, where the tourism is drastically developing in the last 2 decades based on this resource, where we can have promotion of natural wealth, supported by opening new restaurants and development of mountain and rural tourism.

As main obstacle for development of the sector tourism is indicated the insufficient engagement and the lack of entrepreneurship spirit from the local government, as well as the business community. The small budgets of the local government for support of the tourism, along the heavily partied system, bad road infrastructure, institutional barriers and the strong competitive spirit and low cooperation adds up to the situation. “I see a potential obstacle for development of the touristic sector also with the touristic workers who don’t have a desire to join and to act together. They see only the interests in front of their street, but also some of the municipalities are saying that the public services are a higher priority”. All interviewees from the sector education and the civil sector see the business sector as main partner in development of the tourism and 40% of them consider that the local government is a key development partner. However, slowly the perspective is changing, so some think that key players for tourism

development are young organizations, NGO's who can give support, and in partnership with the municipalities can have a biggest contribution towards this sector's development.

To the question what do you think is the advantage of the civil sector for tourism development? The interviewees think that that sector is generator of ideas, good networking, and communication with foreign donators, innovation and initiatives. Still, when asked about the possibilities of individual participation in the tourism sector, most of them don't know in which company they could joint. Further on in the answers appears the need of networking and direction towards common goals:

„In which form to realize that partnership, specifically the institutional forms are not crucial wheather it will be put in a certain frame, but there is a necessity of cooperation between the civil sector, the municipalities, the other institutions and in the part of priorities determination and elaboration of joint programs and not everybody to work on a different priority, like the practice all NGO to start developing different ideas, but they are not always crucial for the municipality development where the activity is implemented.“

Here it is underlined also the need of actualization of public/private partnerships, in order to make a connection between the knowledge and the resources, cooperation with some educational seminars, especially the offer that comes from the civil sector, “can participate actively, as well as interactively, indirectly, with the help of the commerce sector”. Here comes also the question of the role of media, although most of the interviewees answered “I don't know” to the question “What is the part of the media”, still there is also a part the highlights the fact that marketing /promotion are equally important such as creating a good touristic offer.

To the question “How do you evaluate the potential of the business sector and the local government for development of the touristic offer?”, An average good potential is noticed, but not used completely. They think that there is not enough good communication between the two sectors and a lot of possibilities are not used, partly because of the lack of trust that exists between these two sectors. However, all indicate that it is necessary to make some kind of synthesis, where both sectors will have a balance in their place, local government mainly in regards of providing optimal conditions for development, while the business sector takes a part as main investor.

Regarding the question of opinion about the alternative tourism, it is generally considered that there is a lot of space for its development in this region, parallel with the development of the traditional tourism. It was already several times mentioned that a big part of the potential is not used enough, and that there's more need to work on informing and education regarding this situation. Due to the rise of the alternative tourism on a global level, it also represents a magnet for tourist and researches who want to experience certain culture by familiarizing with different segments, such as culinary, nature, traditions, etc.

The key question "What do you think your municipality can offer to develop the alternative tourism offer?" is mostly answered with the tradition of preserving and presentation of traditional values, urban tourism, shopping tourism, agro-eco tourism, tracing different paths in the mountains that will satisfy the biggest adventurers, by using the thermal waters for spa centers, pools and similar projects.

2.3.2 Local government

Discussion with representatives of mayors' cabinets and the tourism development sectors in each of the four municipalities. General score regarding the cooperation of the municipality with the other sectors is that the municipalities have the best cooperation with the media; with the business sector it is satisfying, while the cooperation with the civil sector is the most divergent, depending of the municipality. The general score of all municipalities is that the tourism is developing slowly, on a scale from 1 to 5, middle score is 3 for all municipalities, which indicated a lot of unused capacity, but also limited financial possibilities for the local government to influence a lot on the development. More precisely, all representatives of the local authorities consider that the municipalities have satisfying conditions for development of the touristic offer in the region. Similar is with the segment education and the civil sector, natural thermal waters are considered are the biggest unused potential in the municipalities. "I think that there are grounds for tourism development, in the sense that the classical tourism isn't developed as well, due to lack of capacities like more hotels, more space for cultural artistic manifestations, added by alternative tourism".

From the municipalities, they consider finance and the human factor as main limiting factors for development.

„Firstly there is no interest, secondly certain segments are not organized well, especially in the area of the people who are supposed to work in tourism, the restaurant and hotelier domain”.

They also indicate some difficulties within the institutions to form a team with vision and innovative ideas, which will develop classical, but also alternative touristic offer.

“most often, it is the human factor and the lack of interest of people for the tourism development”.

The municipalities as main partner for development of the tourism sector look for the foreign investments, because they think that the domestic are limited to sea and lake, and they don't have a vision how we could develop a touristic offer with different natural resources. Second chose for partner is the state. Only one of the municipalities considers that key factor for development of the tourism sector in that region are the existing touristic and restaurant capacities, together with the existing events, which need a good marketing campaign to start with, and when the tourists' number starts to increase, the offer itself will become diverse. They say that in certain cities, the events like “Orizijada”, “Pastrmajlijada”, MAKFEST and similar are already established as brands that manage to attract not only domestic, but foreign tourist as well. The problem that needs to be addressed is putting up activities which will keep the interest throughout the whole year.

Regarding the willingness of the municipality to cooperate with the civil sector, the NGOs and individuals, the answers differ from municipality to municipality. The more developed municipalities have better canals for cooperation and communication with the outside collaborators, while the smaller ones are more closed. However, the attitude of all municipalities representatives is that if someone recognizes a potential for municipality's development and needs institutional support, they are ready to reach out if the initiative would improve the life in the community. They think that main part of the individuals is generating ideas, while the civil sector and the NGOs play a key role in creating workshops and trainings for non-formal

education and provide professional training of staff needed for tourism development. When asked “In which form can this partnership of the municipality with the other be realized in order to develop tourism?” the authorities think that the participation should be on more levels in the structures, in participative creating of a plan and a strategy, to proactive participation in the promotion of the local tourism, education of the human factor. The municipalities in their budgets have to plan a provision for development of the civil sector. Part of this money can be directed to projects for improving the capacities in the tourism sector:

„We are open for bringing local policies. We organize debates, workshops, we have open municipality in which everyone can come and make a demand to watch council’s sessions, commission’s sessions, to deliver initiatives through appropriate procedures and we give support for that. But this depends mostly of the citizens.”

From the municipalities, they indicate that they have alternative tourism in a way, above all because of the most present domain in the region, which is the textile industry. They say that with for years there is a big number of people coming for shopping in the cities, especially in Shtip, and then they sit down in the local restaurants and bars. They think it’s necessary only to make a better promotion and organized tours, such as offered outside of the country. The same can then be offered to the foreign markets to attract more tourists for the weekends.

Municipalities are aware that they are crucial in establishing border cooperation and promotion of touristic offer, due to the access of European money; however they justify that they are limited in human capital, so they can’t do much for this situation. They also indicate the fact that the system doesn’t provide re-qualification of personnel, especially not through the employment agency, which they consider more statistic than human resources office. Still, general opinion is that there is satisfying work force in the segment tourism, but that there is lack of qualified force for developing alternatives.

Segments with the biggest potential for development of the touristic offer, based on available resources from the local governments point to: mountain tourism (using thermal waters), using the historical/archeological sites and complexes as subject of visit. For example, improving the conditions for tourism development of the site Bargala, exploiting the church tourism (the Shtip region has more than 200 churches), rare byzantine icons, icons gallery, museum exhibitions, Pastrmajljada, etc. The most important is the story to last during the whole year not only for

a certain period or weekend. Regarding the part of the municipality in the development of alternative tourism, the answers are quite limited due to the institutional frame. They think that the institutions have to direct themselves towards improving the conditions in the classical tourism, and thus provide the option for other players to increase the offer in the alternative tourism.

2.3.3 Business sector

Generally, business sector was the most informed about the situations on the field, but the findings are similar as with the other two interviewed categories. Thus, in direction of cooperation and communication with the local authorities, generally they think it is satisfying, one third think it is a good cooperation, while the smaller players say there is no cooperation between them and the local authority. Regarding the cooperation with the civil sector and education institutions, they indicate a very small and limited cooperation. Regarding the cooperation with the media, they also score the cooperation with an average, satisfying, due to the fact that the communication of business sector and media is mostly for marketing goals, or by tariff.

As a best segment for cooperation of the business sector with the local authority is the possibility to gain subventions for a better business, second segment is the promotion of the region, which influences directly to improving the of business climate. Namely, the commercials and promotion of the city with brochures issued by the local authority, contribute to increase the number of tourists visiting the region, and thus benefits transmit to the business sector, especially in the part of tourism and restaurants and accommodation offers. There is a significant cooperation of the business sector with the local authority in the field of organization of cultural and artistic events, under patronage of the municipalities and directly supported with resources from the business community. Also, the business community, for an organization of any event on a public area has to have authorization from the local authorities and confirm that they always offer a full support any time they need it.

Segments of cooperation to improve are first of all within the business community itself, or more organized work and creating a touristic offer by the restaurant and accommodation capacities. Regarding the cooperation with the civil sector and the education institutions, from

the business sector say that they need a bigger cooperation in the field of education and additional trainings which will satisfy the needs of the business community, especially in the field of tourism. Restarting the city orchestras, this can become part of the daily touristic offer. Better media promotion, NGOs to get involved more actively in the implementation of certain activities to help in developing the night life and the general condition of youngsters in Probishtip. The civil organizations to have a more transparent approach, so they can establish cooperation with the business sector on topics important for the municipalities.

Asked if there was already a regular communication with the three sectors for improvement of the life in the community, the general attitude is that there is no regular communication, but more ad-hoc meetings and mostly with the local government. Still, the opinions of the business sector are that partial non-formal communications should be used and turn into regular official communications, where can be discussed on topics especially connected to tourism development.

For the business sector, the tourism represents a commerce domain that can bring a big profit for all participants in the municipality, if it is well managed. Since the tourism is multidisciplinary in culture, tradition, nature, music, shopping, all it needs is good organization.

Business sector is more rigorous in evaluating the degree of tourism development in the region, an average score is 2, with a quite optimistic score for the future development of the regional touristic product and offer across the border. The score for the potential is satisfying. As main domains for tourism development, the business sector recognizes the: rural tourism, alternative tourism, thermal tourism, ethno tourism, craftsmanship, forming ethno/folklore orchestras, mountain tourism, monastery tourism, Aqua park, all the capacities in Osogovo region, the dam "Gradche", Ponikva etc.

They think that at the moment there is a satisfying quality of adequately qualified work force, but for a more organized development of the touristic capacities through implementing a specific strategic action, it is necessary to have more qualification of professionals who would know how to manage the processes. They also think that systematically, the Employment Agency is not enough active as a main player after finishing formal education. Thus, they indicate that the Agency should commit to provide more resources and trainings, which would be meant as support of the business sector by organizing adequate trainings in the tourism sector, based on the specific needs.

Regarding the initiatives, they think that individuals and the local government don't have big initiatives towards creating cooperation for development of the touristic sector. As potential obstacles for quicker development, they indicate the low initiatives from the society, lack of finances, lack of interest to learn traditional craftwork, because with time their popularity dropped and with it the profitability as well. Joint by a bad infrastructure, weak marketing promotion, lowered entry of foreigners, in conditions of bigger migration of domestic habitants, all of this adds up to decrease of the work force capacity, which could be effectively included in this process.

Due to the above mentioned facts, main partners for sector development are indicated: the municipalities, the state and initiative individuals and in a latter phase, also foreign investors and young people which have ideas and can invest in the east part of Macedonia. The civil sector can partners up for common tourism development, which will not work only thematically on border projects, but also continuous programs for developments of the touristic offer and development of professionals needed for a better management of the sector.

On a micro level, it is necessary to work on raising the knowledge for tourism, culture and satisfying the standards. This can be done by organizing events, trainings, fairs for how to make a touristic product, where participants will apply on volunteer basis (for the bigger events to provide a small compensation, to cover the casts and to increase the motivation for new participants in tourism). Creating new touristic offers means creating conditions for renting part of a house (bed and breakfast), marketing handworks. Craftworks, traditional cuisine, etc. Thus, there is a direct influence on the diversification of touristic offer, and at the same time the standard of the population.

Regarding the part of the local government for the touristic offer development, including trans-border touristic products and services, first of all it refers to improving the infrastructure, resolving the problems with transport and accessibility, facilitating the procedure for building and starting a business in the culture sector, subventions for the starting year or tax liberation towards the municipality, in the period of incubation.

„The part is very important because the local government has to have an elaborated strategy through which will enroll this process with the help of the citizens, because the

citizens couldn't do it on their own without the local government. However, they have a regulative part and should focus more on this segment."

"The local government should be more engaged to attract the foreign investors."

This would be solving the problems that appear in the more remote touristic capacities, or the infrastructural problems, presentation of the touristic capacities outside of the municipality, etc. To enable and improve the conditions of cultural artistic localities (Bargala, Isar, etc); To invest in the rural tourism, thermal water baths; to improve the already existing and open new ski centers in Kochani, to open cycling tracks.

3. Main conclusions

This analysis' goal was to determine the conditions in the tourism sector in four municipalities from the East region of Macedonia, by gathering primary data from conducting half structured interviews with representatives from three key sectors for tourism development, especially from the alternative tourism, these being the education and civil sector, local authorities and the business sector. Although the region is quite small in surface and population, still it is abundant in natural and cultural resources, which are potentially crucial for development of the alternative tourism. Even though the interviewees had different starting grounds, referring the position, the sector's information capacity and their action, still in the biggest part, their answers are overlapping.

Key conclusions of this analysis are that in the region, the tourism sector is not enough developed. There are more factors for this, above all, problem with infrastructure, little inter-sector communication, limited access to financial resources and insufficient sharing of strategic development plans on a national level. However, from all the interviews we managed to bring out around twenty potential threads for future development in the field of tourism.

1. Thermal waters
2. Thermal baths
3. Monastery tourism (over 200 churches, unique icons)

4. Differentiated trails for light walks and adrenalin trails through the region of Osogovo
5. Combining the possibilities offered by the Aqua park, with music events (summer festivals in the rise)
6. Shopping tourism
7. Ethno orchestra
8. Rural tourism
9. Offering courses for the traditional craftworks
10. Dam “Gradche” speleological tourism
11. Courses for traditional cuisine
12. Making traditional cloths
13. Eco tourism
14. Cycling tourism
15. Herbal tourism
16. Orizijada/ rise products/ walks around the rise fields

All of this represents a huge potential for development and positioning on, not only regional, but also global touristic map, because of the diversity and uniqueness of the offer on such small surface.

Annex 1

Questionnaire for research and evaluation of municipality capacity for development of activities connected to alternative tourism

**For the needs of the research, most appropriate is the interview to be recorded, with a given consent of the interlocutor. The answers of this questionnaire are confidential and will be used only for the purposes of the analysis for municipalities' capacity to develop activities for alternative tourism in the East region. Once the study is issued, they will be destroyed according to the rules for conducting an interview for socio economic research.*

Questions for the structured interview:

GENERAL PART (for all, in order to compare the perspective):

1. Interlocutor's position/function
2. Age
3. Gender
4. Are you a habitant of this municipality

EDUCATION INSTITUTIONS, CIVIL SOCIETY ORGANIZATIONS (NGOs) and REGIONAL OFFICE FOR DEVELOPMENT OF THE EAST REGION

(Number of interviews 3 NGO's; 3 schools – two rural and one urban, in each municipality, representative from a regional office for development of the east region, media)

1. How do you evaluate the cooperation with
 - A) the local authority
 - 1) good
 - 2) satisfying
 - 3) no cooperation
 - B) business sector
 - 1) good
 - 2) satisfying
 - 3) no cooperation
 - C) media
 - 1) good
 - 2) satisfying
 - 3) no cooperation

1a) What form of cooperation you have established?

1b) Which segments do you think should improve?

2. What is tourism according to you?

3. According to you, what is the degree of development for tourism in your municipality?

3a) How would you evaluate the possibilities for tourism development, including touristic products and services across the border?

- 1) good
 - 2) satisfying
 - 3) no possibilities
- 3b) Do you see other possibilities for tourism development in your region and in which segment?
4. Score the presence of adequate qualified work force for development of the touristic sector
 - 1) good
 - 2) satisfying
 - 3) no possibilities
5. Do you think if the civil sector has possibility to provide personnel for the needs of the tourism in the region? What is their role in the preparation of the qualified personnel?
6. Do you think that there is an initiative by the local authority and citizens to develop the touristic sector?
 - 1) good
 - 2) satisfying
 - 3) no possibilities
7. Does the municipality have started with activities for tourism development?
 - 7a) What are these activities?
 - 7b) Can you give a score on a scale from 1 to 5, what is the quality and how maintainable are these activities on a long term?
 - 7c) Can you indicate other domains and activities with potential to enrich the touristic offer in the municipality?
 - 7d) What are these domains?
8. What do you see as potential obstacle for the development of the touristic sector?
9. Whom do you see as a potential partner in the tourism development?
10. Do you think that the civil sector can be partner for common tourism development?
 - 10a) What do you think is the advantage of the civil sector for tourism development?
11. In which form can this partnership be realized in direction of tourism development? What is the potential for participation for participation of individuals/citizens for tourism development?
12. What is the part of the NGO/civil sector for the development of the touristic sector, including touristic offer products and services across the border?
13. What is the role of the media for the development of the touristic sector?
14. How do you evaluate the potential of the business and the local government for developing the touristic offer

15. Do you think that they have entrepreneurial attitudes for developing the touristic sector, which would contribute to the economic development of the municipality?
16. What is your attitude towards the alternative tourism?
17. What do you think your municipality can offer for developing the alternative tourism offer?

BUSINESS SECTOR

(Number of interviewed – 4 touristic agencies, 4 restaurants and 4 craftsmen in each municipality)

1. Score for the cooperation of the business sector with:

A) local authorities

- 1) good
- 2) satisfying
- 3) no possibilities

B) NGOs

- 1) good
- 2) satisfying
- 3) no possibilities

C) media

- 1) good
- 2) satisfying
- 3) no possibilities

1a) In with part of the work you have the best cooperation?

1b) What segments do you consider they should be improved?

1c) Is there a regular communication established with the three sectors for improvement of the life in the municipality?

2. What is tourism for you?

3. What do you think is the degree of tourism development in your municipality?

3a) How would you evaluate the possibilities for tourism development, including the touristic products and services across the border?

- 1) good
- 2) satisfying
- 3) no possibilities

3b) Do you see other possibilities for development of tourism in your region and in which segment?

4. Score for the presence of adequately qualified work force for the development of the touristic sector

- 1) good
- 2) satisfying
- 3) no possibilities

5. The part of the Employment agency and employment centers – evaluation of their activities for the business development.
6. Do you think that there is initiative from the local authority and the citizens for the development of the touristic sector?
 - 1) good
 - 2) satisfying
 - 3) no possibilities
7. What do you see as potential obstacle for the development of the touristic sector?
8. Whom do you see as potential partner in the tourism development?
9. Do you think that the civil sector can be a partner for common tourism development?
10. In which form can this partnership be realized for the tourism development? What is the potential for participation for participation of individuals/citizens for tourism development?
11. What is the part of the local government for the development of the touristic sector, including touristic offer products and services across the border?
12. Would you get involved in the tourism development as:
 - A) business representative
 - B) as a habitant of the municipality
13. What is your attitude for the alternative tourism?
14. What do you consider your municipality can offer for developing the offer for alternative tourism?

LOCAL GOVERNMENT

(Mayor's cabinet and tourism development sector for tourism development, in every municipality)

1. Do you have communication and cooperation with:
 - A) the business sector
 - 1) good
 - 2) satisfying
 - 3) no possibilities
 - B) the civil sector
 - 1) good
 - 2) satisfying
 - 3) no possibilities

C) the media

- 1) good
- 2) satisfying
- 3) no possibilities

2. What do you think is the degree of tourism development in your municipality?

2a) How would you evaluate the possibilities for tourism development, including the touristic products and services across the border?

- 1) good
- 2) satisfying
- 3) no possibilities

2b) Do you see other possibilities for development of tourism in your region and in which segment?

3. What do you see as potential obstacle for the development of the touristic sector?

4. Whom do you see as potential partner in the tourism development?

5. Do you think that the media and the business sector can be partners for common tourism development?

6. In which form can this partnership be realized for the tourism development? What is the potential for participation for participation of individuals/citizens for tourism development?

7. Does the municipality encourage civil society activism?

8. Does the municipality support financially civil society organizations who are implementing activities connected to the municipality development?

9. If no, is there willingness to separate resources from the budget for financing NGO's and civil society organizations and groups as partners of the municipality?

10. Does the municipality include the citizens, the civil organizations, the media and business, in the process of adopting local policies?

11. What businesses are present the most on the municipal territory, which has potential to contribute towards sustainable development of the touristic sector?

12. Does the municipality have a vision to encourage entrepreneurial activities that have potential to provide sustainable development of the touristic sector, and can provide municipal development in long terms? How?

13. Score for the presence of adequately qualified work force for the development of the touristic sector

- 1) good
- 2) satisfying

3) no qualifiers

14. Do you think that the local office of the Employment agency offers support for developing personnel in the tourism sector? How would you score their part on a scale from 1 to 5.
15. What is the part of the local government for the development of the touristic sector, including touristic offer products and services across the border?
16. What segments of the tourism do you consider have potential for development in the municipality, based on the available resources? Indicate what resource you think there is.
17. Would you get involved in the tourism development as:
 - A) local government representative
 - B) habitant of the municipality
18. What is your attitude on alternative tourism?
19. What do you consider your municipality can offer for developing the offer for alternative tourism?