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TOURISM

Feasibility Study for Trans-border Biosphere Reserve Osogovo

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Annex I

RESOURCES FOR TOURISM DEVELOPMENT IN OSOGOVO AREA

I. Natural resources for tourism development

I.1. Geographic location

The heart of Osogovo Region is the mountain of Osogovo with an area of 1535.57 sq.km, three thirds of which are located in the southeast of the Republic of Macedonia, and one third – in the upper southwest of the Republic of Bulgaria. To the north, the mountains end at the fertile Slavishko Field (MK) and Kamenishka Hollow (BG); to the west is the course of Kriva River and the Probishtip-Zletovo Basin (MK); to the south – the Kochani Hollow (MK); to the east – Kyustendil Hollow and Struma River Valley (BG).

The municipalities that include territories from Osogovo Mountains and thus form the Osogovo Region are:

- In Macedonia (alphabetically): Cheshinovo-Obleshevo, Delchevo, Kochani, Kratovo, Kriva Palanka, Makedonska Kamenitsa, Probishtip, Rankovce (and a tiny part of Vinitsa which is not included in this survey);
- In Bulgaria (alphabetically): Kyustendil and Nevestino.

The territory of Osogovo Mountains is dominated by forests (58%) and mountain pastures/meadows (about 24%). Arable lands are understandably a low percentage, as well as urban areas; however their percentage is much higher if the whole municipal territories are considered.

Cheshinovo-Obleshevo Municipality

Total territory – 124 sq. km.; only 8.5% are forests, 34.60% - pastures and 53.40% are arable lands.

Delchevo Municipality

Total territory – 423 sq. km.; 48% are forests, 11.60% - pastures and 34.40% are arable lands.

Kochani Municipality

Total territory – 339 sq. km.; 40% are forests, 23.50% - pastures and 22.60% are arable lands.

Kratovo Municipality

Total territory – 376 sq. km; 32% are forests, 32% are pastures and 27.80% are arable lands.

Kriva Palanka Municipality

Total territory – 480 sq. km; 35.80% are forests, 25.30% are pastures and 31% are arable lands.

Makedonska Kamenitsa Municipality

Total territory – 189 sq. km; 44.50% are forests, 20.80% are pastures and 24.55% are arable lands.

Probishtip Municipality

Total territory – 329 sq. km.; 20% are forests; 36.50% are pastures and 35.40% are arable lands.

Rankovce Municipality

Total territory – 239 sq. km; 26.30% are forests, 23.90% are pastures and 36.66% are arable lands.

Kyustendil Municipality

Total territory – 959 sq. km; 42.20% are forests, 19% are pastures and 28.60% are arable lands.

Nevestino Municipality

Total territory – 442 sq. km; 51.80% are forests, 20% are pastures and 23.11% are arable lands.

The geographic location of the Osogovo Region, though a serious liability in the not so distant past of the Iron Curtain, is quite an asset in the modern world of uniting nations. The region is easily accessible from all sides; it has the advantage of uniting two countries; and it is conveniently close to the capitals of both – respectively to the biggest domestic markets and the entrance gates for the foreign markets via the international airports of Sofia and Skopje.

I.2. Landscape

Altitude of the region varies from 375 m to 2252 m. There are over 50 peaks above 1000 m in Osogovo Mountains, a small number reaching above 2000 m: Mt. Ruen (2252 m, at the border between BG and MK), Mt. Mal Ruen (2206 m, MK), Mt. Shapka (2188 m, BG), Mt. Tsarev Vrah (2085 m, MK), Mt. Choveka (2047 m, BG), Mt. Kalin Kamen (2043 m, MK), Mt. Sokol (2038 m, MK), and Mt. Petrovo Brdo (2013 m, MK). Seven ridges start from the highest point of the mountain and go in various directions, separated by deep river ravines. It is interesting that Osogovo is, at the same time, the second largest mountain in Macedonia and the fourth highest mountain in Bulgaria.

The larger Osgovo Area (the whole territories of the adjacent municipalities) also includes the mountains of German (MK, Mt. German 1388 m a.s.l.), Bilino (MK, Mt. Strazha 1547 m a.s.l.) and Konyavska (BG, Mt. Viden 1487 m a.s.l.).

Among the specific forms of relief in Osogovo Mountains are 3 cirques at 1850-2000 m above sea level in the BG part; a large cirque north of Tsarev Vrv and several smaller east of Kitka Ridge in MK part (all above 1700 m a.s.l.); interesting glacial moraines and by-

river screes in both countries. There is a number of waterfalls worth mentioning, such as the ones on the rivers of Zletovska, Kratovska, Orizarska, Durachka and their tributaries in the MK part; and on the tributaries of Struma River in BG.

Sites of particular interest:

Mt. Tsarev Vrv (Sultan Tepe, 2085 m a.s.l., MK) from which the main ridges of Osogovo Mountains start, and it is also an important hydro-geological knot. It is dome-shaped and broad but its slopes run steeply towards the valleys below. The geological composition of the locality combined with the specific vegetation makes it one of the most interesting in the mountain.

Mt. Ruen (2252 m a.s.l., BG/MK), the highest in the mountain, and the neighbouring Mt. Mal Ruen (2203 m) and Sokol (2038 m). Geology is interesting there as a result of glacial processes – moraines, specific rock formations, glacial cirques, etc.

The course of Zletovska River between the tributaries of Emirichka River and Eshterets (length of 10 km, MK). This is a deep river valley with gorges and steep screes, which at places is up to 400-500 m deep. Some of the rock blocks slowly sliding down the slope are as big as 1 m³. The river bed itself forms rapids and waterfalls; the biggest of the latter is found near the village of Yamishte, Kratovo Municipality, 11 m high and with a basin 3 m deep. There are smaller waterfalls (6 m high) on some of the tributaries. Some of them form cascades such as the temporary cascade of Kunovska River with a total altitude difference of 250 m (the largest in Osogovo Mountains).

Ratkova Skala locality is situated near the village of Ratkovitsa (before Sinkovitsa locality). It includes the upper course of Shtalkovichka River, a tributary of Zletovska River, where the water has formed a 1.5 km long deep canyon with walls of up to 400 m. It also includes the peculiar 200 m high rock formations near the village. Along the river bed, there also some small waterfalls and screes.

Waterfall on Kozya River (tributary of Stanechka River), near the village of Stantsi at 8 km south of Kriva Palanka. It is also called Stanechki Waterfall. Its total height is 14 m; there is a beautiful basin formed beneath, impressive rock formations and a green beech forest around. The waterfall is at 1160 m a.s.l., ‘active’ all year round and relatively easy to reach.

The valley of Kamenichka River between the villages of Sasa and Kosevitsa (length of 8 km), Makedonska Kamenitsa Municipality, MK. Due to the geological structure and human influence, the slopes of the river bed feature a dense system of grooves, coulees and vales, plus earth pyramids in the process of formation. Near the village of Sasa, there are also some impressive alluviums 500/300 m.

Istibanska Gorge is a 8 km long part of the course of Bregalnitsa River between the villages of Istibanya and Kalimantsi, mostly in Vinitsa Municipality, MK. It is interesting for the peculiar rock formations resembling needles, mushrooms, columns or various animal or human figures, some reaching up to 10 m height.

Lesново Bowl is a paleo-volcanic formation between the village of Zletovo and the town of Probishtip in MK. It covers an area of 12 sq.km and has high steep rocky walls rising above the surroundings at 400 m. To the east, it is cut by the valley of Zletovska River, and to the west – by Dobrevska River. Its top is a well-shaped caldera or eroded crater with diameter of 1.5 km and depth of 200 m in the middle. Around the center, there are 78 old volcano necks or peaks, the highest being Ilin Krst at 1127 m a.s.l., Sveta Troisa at 1012 m, Nusheva Chuka / Gorno Bardo at 1025 m and Gumichki Rid at 1048 m. It is part of the Kratovo-Zletovo Volcanic Area – about 20 eroded volcano bowls, 4 of which have calderas.

Kundinsko Lake is the only natural lake in Osogovo Mountains, and it is to be found 1 km northeast of the village of Kundino, Probishtip Municipality, MK. Unfortunately, it has been nearly destroyed in the past century for ‘irrigation’ purposes. Today it is of temporary character and is more like a swamp. In the peak of the rain season, the lake

reaches a surface of 13500 sq.m and depth of 3 m. Nearby, there is the large paleo-volcanic bowl of Plavitsa (1297 m a.s.l.) and some interesting rock formations.

The cascade on Babakanina River which is a left tributary to Kratovska River is located 800 km south of Kratovo, MK. Its total height is 30 m and length – about 150 m. It includes 5 waterfalls (first 6 m; second 9 m; third 7 m; fourth 4.5 m and last – 3.5 m). In the vicinity, there are some more, smaller waterfalls plus earth pyramids formed in volcanic rocks.

Kuklitsa Rock Formations are found at 10 km west of Kratovo Town, near the village of Kuklitsa, MK. These are three groups of mysterious rock ‘figures’ of animals and people. There are local legends about the site. According to one, two wedding processions met accidentally at this spot and – as it is absolutely bad luck – they all turned to stones. According to another one, a local boy was about to marry a local girl when suddenly changed his mind and married another one. The abandoned girl cursed the whole wedding procession to turn to stones when they come by this road – which happened. That is why local people call the site the Stone Wedding.

Polskoskakavishki Waterfall on Shiroki Dol River, a right tributary of Struma River, BG. Located in the village of Polska Skakavitsa, 18 km from Kyustendil. Its height is 53 m which makes it the fourth highest in Bulgaria. Right next to it stands the church of Sveti Dimitar. Not difficult to reach; the better viewpoint is from below, which is reached via a steep path.

Shegava River Canyon is very close (easy walking distance) to Razhdavitsa Village, 17 km north of Kyustendil, BG. Shegava River is a 10 km long left tributary of Struma River. Its canyon has deep rocky walls of some 200 m, ‘decorated’ with peculiar shapes such as pyramids, cusps, needles, etc. There are many caves hidden in those rocks. During most of the year, the canyon is dry as the river flows underground. Only in the rain season when there is much water does the river show itself on the surface.

Choklyovo Marsh is located close to the village of Baikalsko, 25 km northeast of Kyustendil, BG. It is the largest peat source in Bulgaria, with 160 ha size of the water surface and a total area of 320 ha.

The **Skrino Gorge** of Struma River starts at the village of Nevestino and reaches the village of Boboshevo. With its 28 km, it is the longest gorge of Struma and, according to some, the most beautiful.

There are seven main types of landscapes in Osogovo Mountains that characterize the area and present potential interest for interpretation:

- 1. Low hilly rural landscape with hedgerows.** Includes mostly flatlands and low hills up to 700 m a.s.l. Landscape is completely or almost completely altered by human activities / agriculture; hedgerows are rarely of natural vegetation – Pubescent Oak, Oriental Hornbeam, Turkey and Italian Oak, and more often of fruit trees, poplar, and similar. Densely populated.
- 2. Hilly open landscape.** These are open higher hills, sometimes with steep slopes, with abandoned field and meadows; a former heavy agriculture region left unattended due to the migration processes out of the villages since the second half of the last century. Vegetation is mostly grass with small shrubs and occasional forest patches. A sub-type of this landscape is the hilly open rocky one which is important due to the high endemism inside.
- 3. Hilly dry forest landscape.** It has diverse relief – both gentle and steep slopes, gorges and valleys, all on higher altitude of 700 to 1000 m a.s.l. Vegetation is semi-natural, comprising woods of – again - Pubescent Oak, Oriental Hornbeam, Turkey and Italian Oak. Due to the relief, there are no settlements here but human pressure was still significant in the past, mostly in the form of forest resources collection (especially timber). With the de-population of the villages in past decades, the area has started to re-gain its natural status.

- 4. Osogovo rural mountain landscape.** It comprises steep slopes, dales and valleys at an altitude of 1000 to 1400 m a.s.l. Vegetation is semi-natural, less altered on the northern slopes and includes Hop-Hornbeam, Sessile Oak and Beech. Human impact has come in the form of cattle-breeding and small patches of potatoes and rye, mostly abandoned today (as well as the rare scattered houses).
- 5. Mountain deciduous forests landscape.** It occupies the altitudes between 1400 and 1800 m a.s.l. Includes mostly beech forests of semi-natural to natural character, and secondary grasslands on clearings. The zone is not populated; and the agricultural activities from the past – potato and rye growing, and cattle and sheep breeding – have been abandoned today.
- 6. Mountain coniferous forests landscape.** This is typical only for the BG part and is 100% artificial, a result of former government policy to re-plant destroyed deciduous areas.
- 7. High-mountain pastures landscape.** It covers the mountain tops above the line of the forest belts. These are mostly secondary pastures as they usually appear at an altitude above 2200 m, while here they were artificially lowered for grazing purposes. Today livestock breeding has declined sharply but the area is still used for collection of non-timber products such as wild berries.

The landscape of Osogovo Mountains may not be unique for the Balkans but it has features of sufficient interest to be used as a tourist resource. The mountain itself and the broader area of the adjacent municipalities host some very specific sites that may serve as a focus of tourist interest. Access to the sites will be of tremendous importance.

I.3. Climate

The territory falls into the moderate continental climate belt; however there are some specifics related to the variations in altitude, namely:

- Low-mountainous zone up to 1200 m above sea level. Average annual temperature is about 10-11°C. The lowest parts can reach more than 13°C. Seasons – mild winter, cool summer, fresh and warm spring and autumn.
- Mid-mountainous zone from 1200 to 1700 m above sea level. Average annual temperature is 6-8°C. Seasons – fresh summer, cool spring and autumn, cold and long winter with lot of rain.
- High-mountainous zone from 1700 to 2252 m above sea level. Average annual temperature is 2-5°C. Seasons – cold winter, autumn and spring, short cool summer, long-lasting snow.

Average rain flow for the area is 600-700 mm and can reach 800-900 mm in the higher parts; average snow cover – 31 days. Average number of sunny days – 230 per year. Maximum rain – May/June; minimum – November.

The climate of Osogovo Region is no more or less favourable than any other mountain in that part of the Balkans. It provides sufficiently good conditions for the development of many types of tourism.

I.4. Waters

It is typical for the area that waters are mainly surface and there are no big underground reservoirs. The main sources of freshwater are the highest peaks of Osogovo Mountains which give life to tributaries of Struma River in Bulgaria to the east (Bistritsa and Eleshnitsa); and of Vardar River to the west (Kriva River and its tributary Durachka River, Kamenichka River, Orizarska River, Kochanska River and Zletovska River, through Bregalnitsa and Pchinya).

There is only one lake – Kundinsko Ezero – small though interesting, unfortunately almost destroyed by people; and some ponds and dams such as Kalimantsi (14 x 0.3 km, 127 million m³ of water), Gratche (3.5 x 0.2 km, 29 km deep), the Knezhevo Dam on Zletovska River (23 million m³ of water) and a potential dam (Rechani, 25 million m³ of water) on Orizarska River. At Kalin Kamen locality, there are two dams: Bazyachko Bardo (14100 m³) and Vlashki Kolibi (6200 m³), at an altitude of 1590 m.

Kyustendil Municipality has three dams and multiple microdams, the larger of which are 9. The biggest ones are the Drenov Dol (640 decares), Bersin (455 decares), and Bagrentsi (238 decares) Dams.

One of the greatest assets of the BG part of the region are mineral waters – 40 springs with temperatures ranging from 50° to 74°C and with a discharge of 2.4 l/m in Kyustendil. Its healing and prophylactic properties are due mainly to sulphides, high temperature, slight mineralization and relatively high fluorine content. The water has a good influence on people suffering from arthritis, laryngitis, faryngitis, mild forms of diabetes, heavy metal poisoning (lead, mercury, bismuth), gastric diseases, and others; after cooling it's suitable for drinking. In Nevestino Municipality, there are two sources of mineral waters. The first one is close to the village of Chetirts; the water is very clean, good for drinking, with about 30 l/sec. It heals kidney and stomach diseases, metabolite disorders and others. The second spring is located next to Nevestino itself but the water is not good for drinking and is only used for bathing and laundry.

In the MK part, there are thermal springs in the villages of Banya (Cheshinovo-Obleshevo Municipality), Gorni and Dolni Podlog near Kochani. Water temperature is above 65°C and is the highest in Macedonia. The spring in Dolni Podlog has a temperature of 79°C and flow of 150 l/sec. The water is utilized through the constructed geothermal system which provides heating for the area of the town of Kochani.

The other source of thermal waters is the village of Topolovik, Kratovo Municipality. The water temperature is 50°C but at 200-250 m below the surface it exceeds 70°C. Drills in

the Kratovo-Zletovo volcanic area have shown presence of thermal waters with a flow of 300 l/sec. which is quite an asset.

The water resources of the Osogovo Region provide excellent potential for the development of various tourism services, incl. some water sports, fishing, spa and the simple pleasures of recreation.

I.5. Flora

Only a short summary is included here about Osogovo's plant life from the point of view of tourism resources. Osogovo Mountains have three natural plant belts:

- Low-mountainous grasslands/pastures (up to 1000 m above sea level): heather, coltsfoot, dandelion, cornflower, nettle, mullein, red and yellow wort, white mallow, etc. There are also bushes such as blackberry, Jerusalem thorn, squat, hop, ivy and others. The tree species include Hungarian oak, Sessile oak, Turkey oak and others, plus willows, birch, chestnuts, hazel trees, etc. There are many medicinal plants and some endemic species; the cultivated plants are mostly represented by wheat.
- Mid-mountainous / beech forests belt (up to 1700 m above sea level): mostly beech, plus birch, hornbeam, hazel tree, ash tree, hawthorn, maple and cornel. There are many forest fruits and berries. Cultivated plants – potatoes, rye, oats and barley.
- High-mountainous grasslands (up to the mountain ridge) – dominated by the species of the Compositae genus.

As already mentioned, there is an additional artificial belt of coniferous forests in the BG part of Osogovo.

There are 1007 registered vascular plant species; 2 endemic and 32 sub-endemic ones (Bulgaria, Macedonia, Serbia and Albania). The territory is very rich in medicinal plants as well.

The types of plant communities may be grouped as follows: mountain pastures; ridge pastures; bare rocks; meadows; marsh communities; riverine grass communities; peat lands; bushes; forests; riverine forest belts.

The plant life of Osogovo as a tourist resource possesses a significant degree of attractiveness to serve as a basis for the formulation of modern tourist services and products.

I.6. Fauna

A short summary is presented below about the animal life of Osogovo.

Invertebrates: 255 species of spiders incl. 12 Balkan and 3 local endemic species; 15 species of dragonflies; 123 species of diurnal butterflies; 83 species of Orthopterans (77 grasshoppers, 4 mantises, 4 cockroaches and 1 earwig); 31 species of molluscs, etc.

Fish: a total of 21 species incl. roach, barbell, carp, trout, common nase, gudgeon, bleak and others.

Amphibians: a total of 10 species incl. salamander, European green toad, marsh frog, yellow-bellied toad, Greek frog, agile frog, etc.

Reptiles: a total of 21 species incl. the Greek tortoise, Hermann's tortoise, European green lizard, Balkan green lizard, European copper skink, European blind snake, four-lined snake, Dahl's whip snake, Montpellier snake, and many others.

Birds: 133 registered species, possibly more, incl. eagle, falcon, hawk, pheasant, pigeon, cuckoo, nightingale, lark, sparrow, skew, raven, daw, jay and many others. The most

important bird sites in MK are Ratkova Skala, the surroundings of Lesново Village and the foothills between the villages of Tripatantsi and Sokolartsi. The corresponding important bird areas in the BG part have been designated as protected territories and are listed below.

Mammals: 41 species incl. the wolf, fox, badger, marten, wild boar, hare, red deer, doe, bear, lynx (the last two only in BG), and others.

The area of Osogovo has a great potential to develop tourism products based on the diversity and values of its animal life. It has charismatic species that are of general interest not only to bird watchers or other customers with specialized interests but to the general public as well.

I.7. Protected nature sites and territories

The important sites under the **Habitats Directive** include:

In Macedonia:

- 6220 Pseudo-steppe with grasses and annuals of the *Thero-Brachypodietea*
- 6230 Species-rich *Nardus* grasslands, on silicious substrates in mountain areas (and submountain areas in Continental Europe)
- 40A0 Subcontinental peri-Pannonic scrub
- 92A0 *Salix alba* and *Populus alba* galleries
- 91E0 Aluvial forests with *Alnus glutinosa* and *Fraxinus excelsior*

In Bulgaria:

BG 0001011 Osogovska Planina Protected Zone includes territories from both Kyustendil and Nevestino Municipalities and is designated to protect 27 habitat types.

Three other protected zones under the Habitats Directive also include parts of the Kyustendil and Nevestino territories and should be mentioned even though they are not literally part of the Osogovo Mountain:

- BG0000294 Karshalevo Protected Zone, 8 habitats
- BG0000298 Konyavska Planina Protected Zone, 17 habitats
- BG0001012 Zemen Protected Zone, 22 habitats

Osogovski Planini (Osogovo Mountains) Important Plant Area, IPA. It has been designated in the MK part due to 3 species of international importance and 11 of national, plus 8 important habitats.

Three Important Bird Areas (IBAs) have been proposed at this point in the MK part:

- Osogovski Planini (Osogovo Mountains), covering the mountain and meant to protect the lanner falcon, Egyptian vulture, short-toed snake eagle, Eurasian eagle-owl, golden eagle, peregrine falcon, black stork and semi-collared flycatcher.
- Zletovska River Valley including the lower course of the river with some parts of Osogovo but also of Mangovitsa Mountain. It is meant to protect several pairs of golden eagles and of stone curlew.
- Kochani Rice Plains located in the Kochani Hollow (from the foothills of Osogovo to the river of Bregalnitsa). It has a large population of storks and nesting colonies of three species of herons.

In the BG part, the **Osogovo Protected Zone** with a number BG 0002079 has been designated under the Birds Directive, to protect the white stork, peregrine falcon, long-legged buzzard, golden eagle, peregrine falcon, rock partridge, Eurasian eagle-owl, grey-headed woodpecker, black woodpecker and many others.

77 of the species are **of international importance** according to international documents such as the Bern Convention, the IUCN Red List, the European Red List and others (95% animals). 27 species of nesting birds are included in Annex I of the Birds Directive. As a whole, researchers have registered 90 endemic species on the mountain (7 of which local) and over 120 rare species.

Protected sites under the MK legislation:

- Oak Natural Monument in the village of Beli, Kochani Municipality
- Tsarna Dudinka Natural Monument at Lesnovski Monastery, village of Lesново, Probishtip Municipality
- Pine Natural Monument, Kratovo
- Karshi Bavchi Natural Monument, Kratovo
- (proposed) Zletovska River Strict Nature Reserve
- (proposed) Tsarvena River Strict Nature Reserve

Protected sites under BG legislation:

- Tsarna Reka Nature Reserve
- Gabra Nature Reserve
- Skakavishki Waterfall Nature Site
- Yuchbunar Nature Site
- Centuries-Old Beech Forest Protected Area

Protected nature territories are a mark that a certain place has something valuable and thus interesting to learn about. They are often a focus of contemporary tourism. The broader region of Osogovo has a good potential to develop products and services

connected to its protected areas and sites. Access to the sites will be of great importance.

II. Anthropogenic resources for tourism development

These are all only briefly summarized here from the point of view of their tourism potential

II.1. Archaeological sites

- Prehistoric times: 3 sites
- Neolithic period: settlements 9; sanctuaries 1
- Eneolithic period: settlements 2
- Iron Age: settlements 4; tumuli 3
- Roman era: settlements 18; necropolises 13; fortifications 3; early Christian churches 4
- Late Roman period: settlements 53; fortifications 31; necropolises 14; traces of mining (mines or ore melting facilities) 6
- Middle Ages: towers/fortifications 11; bridges 13; settlements 6; necropolises 6; churches 15; traces of mining 8

From the point of view of tourism, most important are the following sites:

- Tstotsev Kamen locality near the village of Shopsko Rudare, 12 km northeast from the town of Kratovo, MK. It is a prehistoric settlement (from 25000 years ago) and has wonderful samples of rock art.
- The Roman town of Pautalia (today's Kyustendil, BG) with the Acropolis (Hisarlaka Fortress) and the remains of the Asklepion (the Roman Baths exhibited in the town center).
- The localities of Dolno Gradishte and Lokubiya near the town of Kochani, MK with remain from the Roman period and interesting finds.

- Bela Tsarkva locality at Orizari Village, Kochani Municipality, MK: remains of a Medieval church.
- Golemo Gradishte Complex at Konyuh Village, Kratovo Municipality, MK: late Roman settlement and rock monk cells, plus medieval churches' remains
- Kalata locality at Kalimantsi Dam, Makedonska Kamenitsa Municipality, MK: fortified late Roman settlement
- Gradishte locality (late Roman fortification) and Chiflik-Babuntsi locality (necropolis from the Iron and Roman Ages) near Opila Village, Rankovce Municipality, MK
- Proviralkyata site at Lilyach Village, Nevestino Municipality, BG

The region of Osogovo is quite rich in archaeological sites from various historic periods; some of them are extremely valuable. Most of the sites, however, are not socialized for tourist visits, inaccessible or in poor condition.

II.2. Architectural sites

There are at least 10 settlements around the region of Osogovo that keep samples of interesting architecture. From the point of view of tourism, most important are the following sites:

- Town of Kratovo, MK with its 6 standing Medieval towers and 12 bridges
- Kadin Bridge at Nevestino Village, BG
- Medieval town of Velbazhd (today's Kyustendil, BG) with Sveti Georgi Church Complex, Pirkova Tower, Dervish Baths, Ahmed Bey Mosque, Fatih Sultan Mehmed Mosque, Chifte Baths, etc.
- Medieval tower at the village of Chiflik, Delchevo Municipality, MK
- Medieval tower at the town of Kochani, MK

- Samples of traditional Renaissance Period architecture at the villages of Raychani, Nivichani and Beli (Kochani Municipality, MK); the Old Charshia at the town of Kriva Palanka, MK

The renowned and suitable for tourist visits sites in the region of Osogovo are quite sufficient as quality and quantity to form a comprehensive tourism product. There are places, however, such as many of the isolated mountain villages that still have old houses which will surely be of interest to a specific audience; the problem is access and the poor condition of most of the places.

II.3. Religious sites

The region, naturally, has an enormous number of religious sites as every village has built its own spiritual 'home'; the fact is not all of them are interesting for tourist purposes. There are probably around 50 churches altogether that could become part of a tourism product, and these are Renaissance Period churches. The medieval churches and the few mosques can be considered more of architectural sites. There are also numerous chapels and sanctuaries of lesser importance.

From the point of view of tourism, most important are the following sites:

- The Monastery of Sveti Yoakim Osogovski, Kriva Palanka, MK
- The Monastery of Sveti Gavril Lesnovski, Lesново Village, Probishtip Municipality, MK
- The Monastery of Sveti Panteleymon, Panteley Village, Kochani Municipality, MK
- The Monastery of Pesveta Bogoroditsa (also known as Elenets) at Tsera Village, Makedonska Kamenitsa Municipality, MK
- The church of Uspenie Bogorodichno, Kyustendil, BG
- The church of Sveti Mina, Kyustendil BG

Among the religious sites in the Osogovo Region, there are some really precious ones in terms of tourism potential. There are also other sites that could form a specialized tourism product. However, one must be very careful with the ‘Churches and Monasteries’ theme as it is very tricky to achieve a marketable balance.

II.4. Museums

For a region of this size and with such rich historical heritage, the museum network is not sufficiently developed in terms of tourist services. The most important sites from a tourism point of view are as follows:

- Regional Historic Museum of Kyustendil, BG, and the other museum houses it manages: Dimitar Peshev Museum House, Ilyo Voivoda Museum House and Emfiedzhieva House (plus the Sveti Georgi Museum Complex and the Ahmed Bey Mosque which are part of the museum network of Kyustendil)
- Kratovo Museum located at the building of the former Turkish Konak which is an interesting site in itself
- Kriva Palanka Museum, recently opened in a renovated attractive building at the Old Charshia Str.
- The Art Gallery (town of Kyustendil) and the Museum House (village of Shishkovtsi, Kyustendil Municipality) of Vladimir Dimitrov – Maystora, one of the best artists of Bulgaria

The museum network of Osogovo Region may not be very well developed but there are museum sites of real interest and potential. Efforts are needed to develop a modern museum service.

II.5. Crafts

The region of Osogovo used to have a range of crafts well-developed during the Renaissance period, many of which are forgotten today. It is interesting to note that in a study held in 2007 in the MK part, 9 people out of 92 interviewed (equal to 10% of active population) stated they were occupied in some sort of crafts activity, including 2 furniture-makers, 3 people dealing with knitting and sewing, and 2 farriers. However, from the point of view of tourism, only some crafts are suitable for 'packaging' and selling, and they are better exploited in other parts of Bulgaria and Macedonia. There were some unique crafts features of the area such as the stone-cutting in Lesnovo Village or the special language that local master constructors invented for use when traveling to work in other regions, but unfortunately these are lost today.

The crafts that are marketable from the Osogovo Region are not unique in the scope of Bulgaria and Macedonia and should either be used as a product diversification tool, or for souvenir production, or a new approach should be developed that would create a unique selling point.

II.6. Folklore

The folklore heritage of Osogovo Region, too, is not unique – the larger part of the area falls within the Shopi ethnographic and folklore group which also includes other regions in Bulgaria and Serbia. To the south starts the Maleshevo folklore and ethnographic zone which goes even farther out of the region. And despite the fact that the folklore heritage of the Shopi IS interesting and has potential as a tourism resource, it should be noted that folklore is extensively exploited in Bulgarian tourism and one should be very careful when packing tourist services with it.

The folklore heritage of the Osogovo Region is rich and colourful, and sufficiently preserved as a tourism resource but should be exploited very carefully when packing tourist services so that a marketable product is developed.

II.7. Events – traditional and modern

The region of Osogovo has a rich yearly programme of events of various kinds. Many of them are of local character, that is, for local people and as such are not interesting from a tourism point of view. Others are rather closed as audience like for example the art planers which are very prestigious but – apart from the final exhibition of the artistic works – are mostly for the artists themselves and for common visitors. There are also more ‘popular’ events which might be utilized in creating tourism supply. They can be grouped as follows:

- Folklore festivals (e.g. in Kriva Palanka, Delchevo, Nevestino, etc.) for traditional music and dancing
- Contemporary music and arts festivals (Kriva Palanka, Makedonska Kamenitsa, Probishtip, etc.)
- Specific celebrations of traditions (Todorovden in Konopnitsa Village; Cherry Festival in Kyustendil, etc.)

The rich events calendar of the Osogovo Region needs better valorization in terms of tourism supply. Selected events with greatest potential must be transformed from celebration for the local people into tourist events that can be marketed successfully.

II.8. Traditional lifestyle

The traditional everyday practices of local population in the Osogovo Region have not been utilized up to now as a tourism resource. Only local cuisine has been valorized to a certain extent and in isolated cases such as the Grandma’s Pastry competitions in Elenets Monastery and in Probishtip. Traditional practices may have been much forgotten in the modern world but knowledge is still available and may be restored for tourism purposes.

There are many traditional practices from the region of Osogovo that may be utilized as a tourism resource, especially those related to food and drink production, as well as farming and stock-breeding. Local cuisine also has some specifics that may create marketing advantages.

As a whole, it may be concluded that the region of Osogovo has a wide range of tourism resources with good potential for development. Although not many of them are unique, there are valuable ones both in terms of pure heritage significance and as marketing value. Variety itself is an advantage, and another asset is that the region is a cross-border one.

Most of the resources are not utilized in their full capacity or not used at all. Some are not socialized for tourist visits or the access to them is not good. Whether and how this situation will be changed, is much related to the outer conditions for tourism development, and these are tackled in the next Annex.

CONDITIONS FOR TOURISM DEVELOPMENT

1. Human resources for tourism development

About 50% (52000) of the total population of the 8 MK municipalities live in Osogovo Mountains, and about 23% of these are rural population. In the BG part, a very small percentage of population lives right on the mountain and they are all rural. However, the biggest concentration of people, the town of Kyustendil with about 42800 inhabitants, is located at the very foothill of Osogovo Mountain. Ethnical structure is rather homogenous. Population is constantly decreasing and ageing as a result of heavy migration. The percentage of unemployment is rather high, especially out of the towns.

Cheshinovo-Obleshevo Municipality

7490 citizens in 14 settlements: the villages of Cheshinovo, Obleshevo, Banya, Burilchevo, Varbitsa, Zhigantsi, Kuchichino, Lepopeltsi, Novodelani, Sokolartsi, Spanchevo, Terantsi, Ulartsi, Chiflik. 15% of population lives in the municipal center of Obleshevo; there two more villages of around 1000 people, and only 3 are below 100 inhabitants. There is 18.70% unemployment and the employed work in textile, construction, food- and wood-processing industries, and mining.

Delchevo Municipality

17505 citizens in 22 settlements: town of Delchevo and the villages of Bigla, Vetren, Virche, Vratslavtsi, Gabrovo, Grad, Dramche, Zvegor, Iliovo, Kiselitsa, Kosovo Dabye, Nov Istevnik, Ochipala, Poletto, Razlovtsi, Selnik, Star Istevni, Trabatovishte, Turiya, Chiflik, Stamer. 66% of the population lives in the municipal center and the biggest of the villages have less than 900 inhabitants, while 7 have less than 100. There is 28.90% of unemployment and the employed work in agriculture, processing industries, construction and trade.

Kochani Municipality

38092 citizens in 28 settlements: town of Kochani and the villages of Beli, Bezikovo, Vranintsi, Glavovitsa, Gorno Gradche, Gorni Podlog, Gradovtsi, Dolni Podlog, Dolno Gradche, Yasterbnik, Kostin Dol, Leshki, Moyantsi, Neboyani, Nivichani, Novo Selo, Orizari, Panteley, Pashadzhikovo, Polaki, Preseka, Pribachevo, Pripor, Raychani, Rechani, Tarkanye, Tsarvena Niva. 74% of population lives in the municipal center. Only 3 villages have a population above 1000 people, 7 have above 100, and the others are below 100 inhabitants. There is 21.5% of unemployment and the employed work in textile, construction, food- and wood-processing industries.

Kratovo Municipality

10440 citizens in 31 settlements: town of Kratovo and the villages of Bliznatsi, Vakuf, Gorno Kratovo, Dimontse, Emiritsa, Zheleznitsa, Zhivalevo, Kavrak, Ketenovo, Knezhevo, Koykovo, Konyuh, Krilatitsa, Kuklitsa, Kunovo, Lukovo, Mushkovo, Nezhilovo, Pendak, Prikovtsi, Sakulitsa, Stratsin, Talashmantse, Tatomir, Topolovik, Tarnovats, Turalevo, Filipovtsi, Shlegovo, Shopsko Rudare. 66.3% of population lives in the municipal center. 15 villages have population between 100 and 370 people, and the others have less than 100 inhabitants. There is 23.8% of unemployment and the employed work in construction, food- and wood-processing industries, and mining.

Kriva Palanka Municipality

20820 citizens in 34 settlements: the town of Kriva Palanka and the villages of Bas, Bashtevo, Borovo, Varovishte, Gabar, Golema Tsartsoria, Gradets, Dlabochitsa, Drenak, Drenye, Dubrovnitsa, Durachka Reka, Zhidilovo, Kiselitsa, Konopnitsa, Kostur, Koshari, Kraklya, Kostov Dol, Lozanovo, Luke, Mala Tsartsoria, Martinitsa, Metezhevo, Mozhdivnyak, Nerav, Ogut, Osiche, Podarzhi Kon, Stantsi, Talmintse, Tarnovo, Uzem. Over 50% live in the municipal center of Kriva Palanka; of the villages, there is one above 2000 people and 3 above 500. 8 of the settlements are located in Osogovo Mountains – the town of Kriva Palanka itself, and 7 villages with population less than 100 people. The

other villages have less than 100 inhabitants. There is 32% unemployment; the employed work in mining & industry, trade and agriculture.

Makedonska Kamenitsa Municipality

8110 citizens in 9 settlements: the town of Makedonska Kamenitsa and the villages of Dupitsa, Kostin Dol, Lukovitsa, Moshtitsa, Sasa, Todorovtsi, Tsera, Kosevitsa. 63.5% of population lives in the municipal center. All the villages have between 100 and 800 inhabitants. There is 13.60% unemployment; the employed work in construction, textile, food- and wood-processing industries, and mining.

Probishtip Municipality

16193 citizens in 37 settlements: the town of Probishtip and the villages of Bunesh, Buchishte, Gayrantsi, Gorno Barbarevo, Goren Stubol, Grizilevtsi, Guynovtsi, Dobrev, Dolno Barbarevo, Dolen Stubol Dreveno, Drenok, Zarapintsi, Zelengrad, Zletovo, Yamishte, Kalnishte, Kukovo, Kundino Lezovo, Lesnovo, Marchino, Neokzai, Pastrishino, Petarshino, Pishitsa, Pleshentsi, Puzderts, Ratavitsa, Strisovtsi, Starmosh, Tursko Rudari, Tripatantsi, Troolo, Shtalkovitsa. 54% live in the municipal center. Two of the villages have a population of over 2000 people; 9 villages are between 100 and 300 people, and the rest have less than 100 inhabitants. There is 26% unemployment and the employed work in transport, chemical industry, food- and wood-processing industries, and mining.

Rankovce Municipality

4144 citizens in 18 settlements: the villages of Rankovce, Baratliya, Vetunitsa, Vrazhograntsi, German, Ginovtsi, Gulintsi, Krivi Kamen, Lyubintsi, Milutince, Odreno, Opila, Otoshnitsa, Paklishte, Petralitsa, Psacha, Radibush, Stancha. The municipal center is the only bigger village (population above 1000), while 8 of the others, incl. the three in Osgovo, have less than 100 inhabitants. Level of unemployment is extremely high - 56%; the employed work primarily in commerce, agriculture and mining.

Kyustendil Municipality

57950 citizens in 72 (!) settlements: the town of Kyustendil and the villages of: Bagrentsi, Bersin, Blatets, Bobeshino, Bogoslov, Bunovo, Vratsa, Girchevtsi Goranovtsi, Gorna Brestnitsa, Gorna Grashtitsa, Gorno Uino, Gramazhdano, Granitsa, Gurbanovtsi, Garbino, Garlyano, Gyueshevo, Dvorishte, Dozhdevitsa, Dolna Grashtitsa, Dolno Uino, Dolno Selo, Dragovishtitsa, Zhabokrat, Zheravino, Zhilentsi, Ivanovtsi, Kamenishka Skakavitsa, Katrishte, Konyavo, Kopilovtsi, Kopriva, Kutugerts, Karshalevo, Lelintsi, Leska, Lisets, Lozno, Lozentsi, Mazarchevo, Nikolichevtsi, Novi Chiflik, Novo Selo, Piperkov Chiflik, Poletintsi, Polska Skakavitsa, Prekolnitsa, Radlovtsi, Razhdavitsa, Ranentsi, Rezhintsi, Rasovo, Savoiski, Sazhdenik, Skrinyano, Slokoshtitsa, Sovolyano, Stensko, Tavalichevo, Tarnovlak, Tarsino, Tserovitsa, Tsarvena Yabalka, Tsarvendol, Tsarvenyano, Chudintsi, Shipochano, Shishkovtsi, Yabalkovo. 74% of the population lives in the municipal center; 2 villages have more than 1000 inhabitants; 8 have between 500 and 900 inhabitants; and 36 have less than 100 inhabitants. Level of unemployment is 15.5%; the employed work primarily in the processing industry, trade, construction, transportation and administration (Kyustendil being the administrative center of Kyustendil District).

Kyustendil is the only place in the whole region where there is a specialized Tourism High-School and a private business college that may supply professionals to the development of the tourist sector.

Nevestino Municipality

2821 citizens in 23 settlements: the villages of Nevestino, Chekanets, Vetren, Dlahchevo-Sablyar, Rakovo, Smolichano, Marvodol, Dolna Koznitsa, Stradalovo, Pastuh, Kadrovitsa, Ilia, Tsarvaritsa, Zgurovo, Tishanovo, Lilyach, Nedelkova Grashtitsa, Pelatikovo, Rashka Grashtitsa, Eremia, Drumohar, Chetirtsi, Vaksevo. The only bigger villages are Nevestino and Vaksevo (close to 600 citizens); the others have less than 200 inhabitants (13 below 100), and the village of Chekanets has 1 person. Level of unemployment is 23.7%; the employed work primarily in commerce and agriculture.

The broader region of Osogovo (the territories of the 10 municipalities in question) was quite well populated in the past – 288 settlements have been established and maintained to reach the present day. Unfortunately, the current tendencies are extremely unfavourable – heavy depopulation; migration of young people and ageing of population as a result of that; dying villages (especially the mountain ones); loss of livelihoods and traditions; high levels of unemployment and low standards of living. This makes the provision of human resources for the development of tourism in Osogovo Region quite risky, especially given the fact that the only specialized educational institution that could provide professionals for that branch is the Tourism High School in Kyustendil.

2. General infrastructure and services

2.1. Status of road infrastructure / access to places and sites

The road infrastructure of the region compiles the regional roads that go around the mountain; in the MK part, this is the line Deve Bair Border Checkpoint with Bulgaria – Kriva Palanka – Stratsin – Kratovo – Probishtip – Krupishte – Kochani – Makedonska Kamenitsa – Delchevo. From that major ‘ring road’, a number of deviations enter the mountains as asphalt roads but higher turn into tracks. The main road connections in the MK part are:

- M2: Kumanovo – Kriva Palanka – Bulgaria
- M5: Shtip – Kochani – Delchevo – Bulgaria
- R519: Kochani – Ponikva – Probishtip
- R208: Makedonska Kamenitsa – Kriva Palanka
- R26: connecting M5 with M20
- R211: Probishtip – Lisets – Kriva Palanka (joining with R213)

- R534: Kochani – Obleshevo – Cheshimovo – Probishtip
- R213: Kratovo – Lisets – Kriva Palanka (joining with M2)

Many of the roads are not in a good condition; in some municipalities the percentage of non-asphalt roads reaches as high as 50%.

Railroad network is insufficiently developed. The line Veles – Kochani ends at Kochani. The construction of the line from Kumanovo to Kriva Palanka via Belyakovtsi will start soon.

In the BG part of the area, the main roads are those connecting Kyustendil with the capital of Sofia and with the town of Dupnitsa and the International E79 Road (Sofia – Greece):

- I-6: Gyueshevo – Kyustendil – Sofia (the only first class road passing through the municipality). The same road provides the connection to Kriva Palanka and further to Kumanovo
- II-62 (second class road): Kyustendil – Dupnitsa – Samokov
- III-601: Kyustendil – Dragovishtitsa – Otomantsi Border Checkpoint (third class road providing connection to Serbia)

Nevestino Village is located on the road Kyustendil – Dupnitsa. An alternative II-class connection exists from Nevestino to the town of Blagoevgrad through the Skrino Gorge of Struma River, one of the most beautiful gorges in Southwest Bulgaria. Over 30% of the municipal roads are in a bad condition. Railroad network serves the connection Sofia – Kyustendil – Gyueshevo but is not connected to the railroad network in Macedonia.

The road network of the region of Osogovo is sufficiently developed but insufficiently maintained. Despite the efforts of the local authorities in recent years to utilize every financial opportunity that becomes available and invest in infrastructure, the condition of any of the rural roads is still quite poor. Access to many potential tourist sites, especially near distant villages, is questionable.

2.2. Status of general public infrastructure

Water supply system is not sufficiently developed. There are some hydro-systems of local importance (e.g. from Emiritsa to Kratovo or from Kalin Kamen to Kriva Palanka in MK) but the mountain villages still use water from local sources – springs and wells. Electrification and communications are sufficiently developed.

Cheshinovo-Obleshevo Municipality

Four of the settlements in the municipality have been connected to the regional water supply system in Kochani. The others get water from local sources. Only the villages of Cheshinovo and Obleshevo have sewage systems; the first has also a waste water treatment plant.

Delchevo Municipality

A regional water supply system has been built based on the Loshana Dam. It feeds the municipal center and 5 villages and has a purification plant. The rest of the villages use local sources. Sewerage system in the town of Delchevo covers 92%, while in the rest of the municipality – 68%.

Kochani Municipality

There is a regional water supply system constructed for the town of Kochani and several neighbouring villages, based on the source of Gratche Dam. The other villages use local water sources. Sewage system is constructed in the town of Kochani. Waste water treatment plants are needed.

Kratovo Municipality

The water supply of the municipal center comes from Zletovska River through a water purification plant. The same system supplies five villages as well. For the supply of 6 other villages, an additional plant has been constructed between the villages of Shlegovo

and Prikovtsi. Sewage system is available only in the town of Kratovo but it has no waste water treatment plant.

Kriva Palanka Municipality

Water supply in the municipal center is provided by spring catchments (over 100); in the villages – by wells, pumps and a small percentage of local water pipes. 70% of the municipal center is included in the sewerage system which has no treatment plant; the villages have no such systems.

Makedonska Kamenitsa Municipality

Water supply is hindered by the scattered type of the settlements (in quarters or mahali). The water supply system of the town of Makedonska Kamenitsa is old; in some quarters citizens themselves make organization for the renovation. The result is, drinking water quantities are quite sufficient but water quality cannot be guaranteed. No treatment of wastewaters is available. Sewerage system is constructed only in the municipal center. There are also problems with the management of waste.

Probishtip Municipality

The supply of Probishtip town with drinking water comes from Zletovska River, with no purification. Villages are supplied from local sources. 90% of the municipal center is included in the sewage system but with no waste water treatment plant. No sewerage is available in the villages. The expected construction of Zletovitsa Hydro-System will probably bring improvement to water management in the municipality.

Rankovce Municipality

Less than half of the settlements are included in a local water supply system fed by springs and wells (supplying 70% of the households); the others have small catchments on individual wells and springs. Only 3 of the 18 settlements have sewerage systems and they do not include all households; no water treatment plants are available.

Kyustendil Municipality

There are 199 underground and 21 surface sources used to serve the purpose of water supply. There is one drinking water treatment plant in Zhilentsi Village (1982) with a capacity of 250 l/sec, which supplies for the town of Kyustendil and the Lozno and Zhilentsi Villages. The water supply network was constructed more than 40 years ago, it is amortized and this leads to frequent breakdowns and water loss. The only urban areas with an established and functioning sewer system in Kyustendil Municipality are the town of Kyustendil, Shishkovtsi Village, and Girchevtsi Village. Kyustendil has a wastewater treatment plant but rather old and with insufficient capacities. A smaller such plant has been constructed in Shishkovtsi Village. The town of Kyustendil has been provided with gas supply for both industrial and personal needs.

Nevestino Municipality

Water supply of all settlements is arranged from springs and wells, from their own sources. Only a small percentage of the municipal center is included in a sewerage system. No waste water treatment facilities are available.

The status of general public infrastructure in the region of Osogovo is not a limitation factor for the development of tourism. Supply of electricity, water and communications is secured; and sewage is available at least in the municipal centers. However, the age of the carrying systems and the lack of purification plants may pose a risk to the quality of drinking water; the lack of sewage infrastructure may create difficulties for the development of some tourist facilities; and the lack of wastewater treatment establishments is a threat to the overall quality of local environment which modern tourists are sensitive to. In addition, there is a serious problem with unregulated solid waste depots which are sometimes located right next to roads and present a source of all kinds of unpleasant or hazardous effects.

2.3. Public services

Those services are vastly available in the municipal centers while completely absent at the mountain villages.

Cheshinovo-Obleshevo Municipality

Doctor's and dentist's offices are available only in the villages of Cheshinovo and Obleshevo, equipped with ambulances. There are football playgrounds in some of the villages.

Delchevo Municipality

A big health institution is located in the municipal center; a smaller one – in the village of Trabotivishte; and small health points are opened in 6 more villages. The town of Delchevo has one stadium, several playgrounds and one swimming pool. Some of the villages also have playgrounds.

Kochani Municipality

Health services are concentrated in the municipal center and some – in the bigger villages. There is a sports complex in Kochani, containing: football and tennis playgrounds, mini-golf, swimming pool.

Kratovo Municipality

There is a general health service in the town of Kratovo, with branches in six villages; there are also some private doctor's and dentist's offices in the municipal center. Sports facilities in the town of Kratovo include an outdoor Olympic-size swimming pool, a modern football stadium, a sports hall and several sports playgrounds.

Kriva Palanka Municipality

A regional health service is available in the town of Kriva Palanka, together with several private doctors' offices and a private health center. Sports facilities in the municipal center

include a town stadium, open playgrounds and a sports hall; some villages also have their own playgrounds.

Makedonska Kamenitsa Municipality

One health service station is available in the municipal center. Sports facilities are also concentrated there including a football stadium and several playgrounds.

Probishtip Municipality

One public health service and three private ones are available in the municipal center, plus one smaller station in the village of Zletovo. Sports facilities in the municipality are concentrated in the town of Probishtip and include: sports halls and swimming pool in some of the schools; an open air city swimming pool with Olympic size; city football stadium and handball / basketball playgrounds. A football playground is also available in the village of Zletovo.

Rankovce Municipality

There are small health services in three of the villages (Rankovce, Psacha and German); the municipal center has one dentist, one pharmacy and one veterinary office.

Kyustendil Municipality

Regional hospital with capacity for 300 people. The municipality has 42 doctors and over 100 dentists who work in the town of Kyustendil and the bigger villages. Sports facilities are very well developed. While the villages have mostly football playgrounds (plus swimming pools in Slokoshtitsa and Sovolyano), the town of Kyustendil has several sports sites:

- Osogovo Sports Complex: halls for sports games, gymnastics, acrobatics, boxing, fitness, martial arts, aerobics, etc.; indoors running track with space for other field athletic disciplines
- Swimming complex with 2 pools: large and children's one

- Alay Bath Relax Center: sauna, relax rooms, massage facilities
- Strandzhata Stadium with running track and additional facilities
- Playgrounds for other sports incl. handball, basketball, etc.

Nevestino Municipality

One emergency health center in the village of Nevestino; one dentist's office also there. Of the sports facilities, the only available are some football playgrounds in the bigger villages.

The fact that public services are concentrated in the municipal centers of Osogovo Region can only be a problem in case of tourism initiatives and development in places that are quite distant from those centers. However, these problems can be foreseen and tackled through good organization. Existing sports facilities are not actually utilized as tourism resources and some of them are not in a very good condition.

Annex III

CURRENT TOURISM DEVELOPMENT

1. Basic tourist services – places to stay and eat

Cheshinovo-Obleshevo Municipality

- Orizov Most Restaurant – 200 people
- Irish Pub – 50 people
- Orka Stil Restaurant – 300 people

Delchevo Municipality

- Makedonia Hotel, Delechevo – 60 beds
- Kula Motel, Delchevo – 15 beds and restaurant for 250 people
- Granit Villa, Golak – 30 beds and restaurant for 60 people
- 80 beds in private rooms in Delchevo
- Makedonia Restaurant, Delchevo – 350 people
- Antika Restaurant, Delchevo – 220 people
- Izvor Komit Restaurant, Delchevo – 110 people
- Zuna Restaurant, Delchevo – 60 people
- Sofra Restaurant, Delchevo – 60 people

Kochani Municipality

- Nacional Hotel, Kochani – 50 beds and restaurant for 300 people
- MVR Recreation Base, Ponikva – 80 beds, conference room/s

- Sharena Cheshma Motel, Ponikva – 20 beds and restaurant for 250 people
- Izgrev Motel, Ponikva – 45 beds and restaurant for 120 people, meeting room for 25 people and summer terrace for 80 people
- Osogovska Kuka Villa, Ponikva – 15 beds and terrace for 40 people; equipped kitchen
- Mitse Motel, Ponikva – 30 beds and restaurant for 90 people
- Osogovski Konak Motel, Ponikva – 60 beds, hall for 60 people
- Osogovski Biser Motel, Ponikva – 40 beds and restaurant/hall for 100 people plus summer garden for 160 people
- Brana Gratche Hotel, Gratche Dam – 50 beds and restaurant for 320 people
- Doncho Motel, Orizari – 80 beds
- 2 fish restaurants at Gratche Dam
- 7 restaurants and 6 pizza places in the municipality

Kratovo Municipality

- Kratis Hotel – 60 beds and restaurant for 250 people
- Aleksandria Restaurant for 100 people

Kriva Palanka Municipality

- Tourist Hotel, Kriva Palanka – 120 beds, restaurant for 250 people
- Makedonia Motel, Kriva Palanka – 30 beds and restaurant for 400 people;
- Lulu Villa, Kriva Palanka – 9 beds
- Kalin Kamen, Bela Voda and Bilino Hunting Lodges

- Kalin Kamen, Drenak and Sokol Mountain Huts
- Sveti Yoakim Osogovski Monastery – 120 beds (still in construction);
- A total of 16 restaurants, incl. 3 fish restaurants (DA-BO Fishery with restaurant, Zhidilovo Village)

Makedonska Kamenitsa Municipality

- Sasa Hotel, Makedonska Kamenitsa – 40 beds and restaurant for 200 people
- Elenets Monastery, Tsera – 20 beds

Probishtip Municipality

- San Niko Hotel, Probishtip – 60 beds and restaurant for 350 people
- Chereshovo Topche Hotel, Probishtip – 50 beds and restaurant for 400 people
- Brioni Motel, Probishtip – 15 beds and restaurant for 150 people
- Done Bozhinov Boarding School – 129 beds and hall for 250 people
- Lesnovo Pension, Lesnovo - 12 beds with tourist information and small souvenir shop
- Fisheries on Zletovska River with fish restaurants

Rankovce Municipality

- Krater Motel – 30 beds, restaurant for 200 people
- Park Ginovtsi – 14 beds, restaurant for 150 people

Kyustendil Municipality

- Strimon Spa Club (5*), Kyustendil – 138 beds, restaurant (two halls) for 110 and 40 people, lobby bar and pool bar, conference halls, spa center

- Velbazhd Hotel, Kyustendil – 60 beds and restaurant for 120 people, conference hall
- Bulgaria Hotel, Kyustendil – 46 beds and restaurant for 80 people, conference hall
- BDZ Holiday Home, Kyustendil – 56 beds
- NEK Sanatorium, Kyustendil – 156 beds, health and wellness facilities
- Belia Kamak Motel, Kyustendil – 10 beds and restaurant for 40 people
- Tedi Sim Bungaloos, Kyustendil ring road – 16 beds
- Lazur 1 Family Hotel, Kyustendil – 12 beds and restaurant for 40 people (plus garden for 30 more)
- Lazur 2 Family Hotel, Kyustendil – 24 beds and restaurant for 150 people
- Lavega Family Hotel, Kyustendil – 11 beds
- Ramira Family Hotel, Kyustendil – 68 beds and garden restaurant for 100 people
- Rai Family Hotel, Kyustendil – 12 beds
- Balkan Family Hotel, Kyustendil – 20 beds
- Rozovata Kashta Guesthouse, Kyustendil – 8 beds, kitchen facilities, dining room
- Ahat Rooms, Kyustendil – 10 beds
- Pri Baba Rooms, Kyustendil – 10 beds
- Salmina Rooms, Kyustendil – 10 beds
- Evropa Rooms, Kyustendil – 10 beds

- Flamingo Rooms, Kyustendil – 10 beds
- Valentino Rooms, Kyustendil – 10 beds
- Desika Rooms, Kyustendil – 6 beds
- Vejdarski Hostel, Kyustendil – 10 beds
- Cheshmeto Complex, Hisarlaka, Kyustendil – 15 beds, winter garden restaurant for 150 people, summer garden for 200 people
- Orlovo Gnezdo Hotel, Hisarlaka, Kyustendil – 19 beds and restaurant for 40 people
- Paradise Family Hotel, Zhilentsi – 30 beds, restaurant for 60 people, conference hall
- Elenite Rooms, Zhilentsi – 10 beds
- Trite Buki Hotel, Osogovo Tourist Zone – 64 beds and restaurant for 130 people
- Tri Buki Bungaloos, Osogovo Tourist Zone – 27 beds
- Osogovo Hut, Osogovo Tourist Zone – 37 beds and restaurant for 40 people
- Municipal Recreation Home, Osogovo Tourist Zone – 10 beds
- Bor Hunting Lodge – 18 beds
- Lima Hotel, Studen Kladenets locality, Osogovo – 40 beds and restaurant for 120 people, meeting hall, relax center
- Yuch Bunar Municipal Recreation Home, Bogoslov – 14 beds
- A total of 21 restaurants, 6 fast food places and 6 night clubs

Nevestino Municipality

- Pastuh Bungaloos, Pastuh (Skrino Gorge) – 20 beds, kitchen facilities, dining room

There is an obvious disproportion in the supply of basic tourist services (accommodation and catering) around the region of Osogovo. The biggest concentration of such services is in Kyustendil Municipality and especially the town of Kyustendil itself while the neighbouring municipality of Nevestino has almost zero supply. In the MK part, services are concentrated in the municipal centers as well. Disproportion is also visible in the existing types of accommodations – hotels and motels are most common while guesthouses (and rural establishments in particular) are practically absent. Existing capacities may seem scarce outside of Kyustendil but the fact is even they are not utilized efficiently.

2. Additional tourism services

2.1. Trails

Existing mountain trails in the MK part of Osogovo

1. Kochani Town – Dalgodelsko Bilo – Mt. Tsarev Vrv
2. Krushka – Borovo Brdo – Mrtvichki Rid – Mt. Tsarev Vrv
3. Krushka – Ramno Brdo – Kormina – Mt. Tsarev Vrv
4. Krushka – Golem Chiparnik – Mt. Tsarev Vrv
5. Gratche Dam – Yasterbnik Village - Ponikva
6. Kochani Town – Aerodrom - Ponikva
7. Kochani Town – Panteley – Ratkova Skala - Ponikva
8. Ponikva – Mt. Tsarev Vrv – Mt. Ruen

9. DA-BO Fishery – Mrkov Rid – Mt. Tsarev Vrv
10. Toranitsa – Sokol – Mt. Ruen
11. Sveti Gavril Lesnovski Monastery – Sveti Yoakim Osogovski Monastery
12. Lesново Village – Lukovo - Kostadinitsa
13. Sveti Teodor Tiron Church – Brana Knezhevo – Kormina - Ponikva
14. Sveti Yoakim Osogovski Monastery – Kozya River – Stanechki Waterfalls
15. Kriva Palanka Town – village of Drenak – Mid Lopen - Ponikva
16. Kratovo Town – Volcanic Balls – Nezhilovo – Mt. Lisets – Mlakari - Kratovo Town
17. Rankovtse Village – Sveti Nikola – village of Psacha - Rankovtse Village
18. Park Restaurant – Ezertse Restaurant – Machya Glava – Mt. Lisets
19. Rankovtse Village – Kriva River - Kuklitsa
20. Kuklitsa – Talimanishte – Mt. Lisets
21. Kriva Palanka Town – Kostadinitsa – Mt. Tsarev Vrv
22. Kriva Palanka Town – Kostadinitsa – Mozhdivnyak
23. Mozhdivnyak – Mt. Lisets
24. Lesново Village – Yamishte Village – Ponikva
25. Probishtip Town – Lesново Village – Lukovo – Sveti Spiridon
26. Probishtip Town – Zletovo Village – Tursko Rudari – Raichani Village – Panteley Village
27. Sveti Spiridon – Zelen Grad - Ponikva

28. Makedonska Kamenitsa Town – Kitka – Mt. Tsarev Vrv – Mt. Ruen

29. Makedonska Kamenitsa Town – Sasa Village – Mt. Ruen

30. Obleshevo Village – Raychani Village

31. Banya Village – Nivichani Village

32. Orizari Village – Preseka Village – Tsera Village

4M International Trekking Route

The first cut (4M-1) connects the Osogovo and Lesnovo Monasteries. The other cuts should lead to the Rila Monastery in Bulgaria and to the Pchinya Monastery in Serbia. The route starts at Lesnovo Monastery, goes up towards the village of Lukovo and then down towards Zletovska River. For some time it follows the river offering beautiful views of the rocky river bed (canyons, waterfalls) and then it goes up again, through beech forests and open meadows, to Kostadinitsa locality at 1645 m a.s.l. From there, the route starts descending via the Korja 'Maala' (quarter) of Durachka Reka Village with its traditional old architecture and then towards the outskirts of Kriva Palanka and the road to Osogovo Monastery.

Existing cycling trails in the MK part of Osogovo:

1. Istibanya Village – the old road to Preseka – Dobra Voda Monastery – Orizari Village

2. Shagal Motel – the old road to Preseka - Dobra Voda Monastery – Orizari Village

3. Sveti Ilia (Rechani) – Vraninski Ridge (Vranintsi) – Orizari Village

4. Gratche Dam – Yastebnik Village - Ponikva

5. Leshka Krivina – Gratche Dam

6. Ponikva – Sveti Vasilie Veliki Monastery – Zelen Grad Village

7. Aerodrom – Ratkovitsa Village – Shtalkovitsa Village – Zletovo Village

8. Panteley Village – Tursko Rudari Village – Zletovo Village – Lesново Village
9. Panteley Village – Shtalkovitsa Village
10. Panteley Village – Svilanovo Village – Spanchevo Village
11. Kriva Palanka Town – Mozhdivnyak Village – Kostadinitsa – Mt. Tsarev Vrv – Mt. Kalin Kamen – Kriva Palanka Town
12. Belski Vineyards – Sveti Ilia

Walking trails in the BG part of Osogovo:

1. Kyustendil Town – Hisarlaka Park – Bogoslov Village – Osogovo Hut
2. Kyustendil Town – Zhilentsi Village – Studen Kladenets locality – Osogovo Hut
3. Osogovo Hut – Prevala locality – Mt. Ruen
4. Osogovo Hut – Mt. Tsarnotrav – Vratsa Village
5. Osogovo Hut – Mt. Sokolov Kamik – Vratsa Village
6. Osogovo Hut – Razkola locality – Eshekchiiska Ornitsa locality – Mt. Choveka – Prevala locality – Karakashka Quarter – Trite Buki Complex
7. Osogovo Hut – Golyam Predel locality – Brezovski Ridge – Slokoshtitsa Village
8. Osogovo Hut – Tsarna Reka Reserve – Chekanski Bridge – Kyustendil Town
9. Mt. Ruen – Gyueshevo Village
10. Garlyano Village – Mt. Ruen
11. Kyustendil Town – Smolichino Village
12. Kyustendil Town – Nevestino – Chetirska Cave
13. Kyustendil Town – Tsarvaritsa Village – Gabra Nature Reserve – Chernata Skala Pass

14. Kyustendil Town – Vetren Village – Krastati Kamen locality – the Big Cave

Many of these trails are also suitable for cycling.

There is quite a good number of existing trails on the territory of Osogovo Region though these trails are not jointly maintained and promoted and practically cannot be seen as a network. It is a good thing there are also options for cycling, although the supportive infrastructure for this type of tourism is not present (e.g. bike repair and maintenance services). The condition of signing and marking of trails, as well as their safety status requires a lot of improvement too.

2.2. Others (not listed above)

Cheshinovo-Obleshevo Municipality

- Baths at Banya Village. Water temperature is 63°C, the flow is 30 l/sec. The water has healing effect on diseases of the bones and nerves, gynecological diseases, infection of the gall and the duodenum.
- Sokolartsi Hunting Zone. With a territory of 8350 ha where small game is bred, it is managed by a local NGO from Cheshinovo (Goritsa Association).
- Pheasant farm near the village of Chiflik, at Bregalnitsa River. Some of the animals are used for hunting.

Kochani Municipality

- Ponikva Mountain Center: ski facilities with 2 ski-lifts and a snowboard park (plus artificial snow facilities and lighting on the ski runs for night skiing); accommodation and catering establishments; summer walking and cycling trails; conditions for para-gliding. Sveti Vasili Veliki Monastery was also built at Ponikva, with a big monastery holiday on January 14.

- Polaki Hunting Zone with trophy game: red deer, doe, wild boar. There is also a hunting lodge for 8 people.
- Gratche Dam Recreational Center with places to stay and eat, conditions for fishing and relaxation.
- Water mill on Kochanska River by the road to Gratche Dam. It is the last still operational old mill in this area.
- Fulling mills at the Vodenitstite locality between the village of Kostin Dol and Rechani, on Bela River.
- Centuries-old hornbeam at the village of Yastrebnik, with a spring coming from under its roots.

Kratovo Municipality

- Rock Art Reserve near the village of Trnovo, at Orlov Kamen locality (the site stretches for 1200 m² from the entry of Kriva River into Pchinya River, in the direction of the BG border).

Kriva Palanka Municipality

- Kalin Kamen location with small ski runs, children's playground, a hunting lodge and mountain hut. Some trails pass here; there is a massive development plan for a ski resort.

Kyustendil Municipality

- Ethnica Center at Bratstvo Community Center (Chitalishte) in the town of Kyustendil opened in 2006. It has collections of various materials and tools related to crafts and cultural heritage as a whole, plus clubs in handicrafts, demonstrations of rituals and customs and authentic songs and dances.
- Hisarlaka Forest Park with short trails such as the Health Path and the Love Alley; a zoo and a children's playground. Hisarlaka Fortress is also located there.

- Osogovo Tourist Zone – mountain trails, several ski runs with a ski-lift, accommodation and catering establishments.

The additional tourism services in the region of Osogovo are poorly developed at this point. Guiding services, animation and heritage interpretation are practically absent. The visitors are expected to simply go and see various sites for themselves which firstly requires a better socialization of the sites and secondly brings no money to local economy. No demonstrations or tasting or dramatization, etc. are offered.

3. Stakeholders

Municipal administrations of:

- Cheshinovo-Obleshevo
- Delchevo
- Kochani
- Kratovo
- Kriva Palanka
- Makedonska Kamenitsa
- Probishtip
- Rankovce
- Kyustendil
- Nevestino

District Governor's Office, Kyustendil

Kyustendil Office of the Southwest Forestry Company

Regional Forestry Directorate, Kyustendil

Pernik Regional Inspectorate of Environment and Waters

Makedonski Shumi State Enterprise with its regional offices

Kyustendil Regional Historic Museum

Tourism-related NGOs:

- Breza Environmental Association, Obleshevo
- Dren Environmental Association, Spanchevo
- Lipa Environmental Association, village of Cheshinovo
- Agro Stimul Association, Municipality of Cheshinovo-Obleshevo
- Boshkovtsi Association, Municipality of Cheshinovo-Obleshevo
- Goritsa Hunting Association, village of Cheshinovo
- Dozhdovnik Environmental Association, Delchevo
- Gotse Delchev Cultural Association, Delchevo
- Piyanets Association for Culture, Delechevo
- Iskon Cultural Heritage Association, Delechevo
- Eko-Chiflik Environmental Association, Chiflik
- Elektriika Sports Club, Kochani
- Osogovo Regional Development Association, Kochani
- Osogovo Mountain Sports Association, Kochani
- Friends of Kratovo Civil Association

- Regional Center for Sustainable Development, Kratovo
- Kratovo Center for NGO Support
- Breza Environmental Association, Turalevo
- Lisets 2000 Environmental Association, Kratovo
- Ela Environmental Association, Kratovo
- Ilinden Mountaineers' Club, Kratovo
- Rock Art Center – Kratovo
- Macedonian Society for Protection of Birds, branches in Kratovo and Probishtip
- Flora Environmental Association, Kriva Palanka;
- Osogovo Civil Association – Kriva Palanka
- Regional Center of Cooperation Spectar, Kriva Palanka
- Civil Center for Sustainable Development, Kriva Palanka
- Zeleni Pateki Cycling Club, Probishtip
- Osogovo Slow Food, Probishtip
- Citizens' Committee for Development – Probishtip (civil association)
- Zletovitsa Environmental Association, Zletovo
- Center for the Development of the Northeast Planning Region, Kumanovo
- Center for the Development of the East Planning Region, Shtip
- Osogovo Tourist Association, Kyustendil
- Regional Chamber of Crafts, Kyustendil

- Roden Krai Association, Kyustendil
- Civil Initiative for Local Development Foundation, Kyustendil

Providers of basic and additional tourism services

There is a sufficient local capacity to start an organized and structured development of Osogovo Region as a tourist destination. There is of course a shortage of experience, knowledge and skills at some points but with high levels of motivation and partnership good results can be achieved.

4. Visitor flows

According to international sources, the global situation in tourism can be described by the following numbers: international tourism arrivals for 2014 – 1.1 billion (compared for example to 800 million in 2006); expected average annual growth rate by 2020 – 4-4.5%. The receipts from these arrivals account for about 1.5 trillion USD (compared to 680 billion USD in 2006). Tourism provides more than 10% of jobs around the world and is among the top five structural economic branches for 4 of every 5 countries.

Experience has shown that periods of higher growth (1995, 2000, 2014) usually take turns with periods of modest growth (2001-2003). After the global economic crisis, figures have now come to a normal, steady growth rate.

There are some regional differences that have persisted through the years: Africa has the highest growth rate (between 10 and 16%), while North America has the lowest (below 1%). Europe has shown a relatively low rate of growth – between 3 and 4% - but it should be noted that this means some 20 million extra arrivals annually. And as 4/5 of international arrivals are intra-regional, and this trend is expected to persist by 2020, the most important market for Bulgaria and Macedonia will obviously continue to be the European one.

Within Europe, the picture is not bad for the sub-region where Bulgaria and Macedonia are located. At the time when Northern Europe shows growth of arrivals of 2% and Western Europe – 4%, the Mediterranean and the Balkans have an average of 6%. If these figures are reviewed back in the years, it will be seen that the number of visitors to that area grew twice in the period 1990-1995; growth rate 2004/2003 was 10% and growth rate 2005/2004 was 1.9%. This was quite a drop at the time, which was explained by many reasons but probably one of the most important was that after the boom of region's popularity, the growth rates were normalized in time and gradually got nearer to the average for Europe as is shown now. Another reason was the value-for-money factor, i.e. the quality of products and services which is of growing importance to tourists, and the region was not performing quite well in this precise aspect. This factor is still vital according to visitor surveys despite the fact that the region is experiencing a steady growth now.

The location of Bulgaria and Macedonia on the tourist map of the Old Continent is fluctuating, although they do stand in the first half of the scale regarding both the number of arrivals and the tourism receipts. The global market share of Europe as a whole is above 50% but Bulgaria and Macedonia are far behind giants such as France and Spain. The market share of both Bulgaria and Macedonia within Europe is between 1 and 2%. Similar figures are shown only by Norway, the Czech Republic and Ireland. It must be noted that it is important to explore not only the growth rate but its expression in real numbers of visitors. For example, in order for Bulgaria to reach the results of neighboring Turkey, it is necessary to have a growth rate of not 4 or 6% but whole of 400%.

There is a visible global growth in the number of overnights as well but at a slower pace than the growth in international arrivals. If the average growth of arrivals in Europe for last years is 4%, the growth of overnights is 2%. This is mostly due to the decrease in the average length of stay and the re-orientation of tourists towards shorter vacations (there is also a growing number of tour operators specializing in the so-called short breaks, 2-4

days). An additional factor here is the increased offering of low fare flights. In recent years, the average length of stay abroad has dropped from 14 to 10 days.

When reviewing the data on international receipts, Europe again takes about 50% on the global level. Less than 10% of these are drawn to Central and Eastern Europe and, unfortunately, Bulgaria and Macedonia are at the end of the line (around 1% market share). The reason for that is not only the smaller number of visitors but also the lower costs of tourist services.

The growth rates of arrivals in Bulgaria are fluctuating due to two main reasons. The first is that Bulgaria is being marketed and broadly known as a mass tourism destination for sun and sea, and the massive construction along the Black Sea coast cannot be related to a good vacation. Same goes for the ski-marketing. The second reason is that, with the increase in the value of workforce, all prices are slowly going up and the country is losing one major advantage against the neighboring Turkey and Greece for example – the cheaper packages.

The review of source markets has shown that, of the 50 world countries generating most tourists globally, half are European, and the Top 10 include Germany, UK, the Netherlands, France, Italy and Russia. The main target destinations for those tourists are: Spain (13%), France (11%), Germany and Italy (8% each), Austria and UK (5% each) and Turkey (4%).

To finalize the global picture of tourism worldwide, it should be noted that about 50% of all tourists have been on vacation (16% - business trips, 26% - visiting friends or relatives, for health purposes, etc.). Biggest number of arrivals occur in July and August, least – in October and November. The use of Internet not only for information but for direct bookings is growing by 30% every year.

Tourism trends for Europe could be summarized as follows:

- Steady bigger share of older tourists – aged 40 and above, plus the so-called third age. This is related to the high pensions in many European states and the availability of free time. In the years to come, however, this trend might slightly change as many European countries are slowly raising the age barrier to pension. These tourists are mostly looking for calm and peaceful vacation combined with opportunities to see new cultures; that is why they travel extensively off-season.
- Young tourists (aged 16-35) present 20% of the global tourist market and are growing in number, which is favoured by the overall growth of income and the increase of the number of single households. These tourists are mostly looking for the experience – more special and more active though shorter vacations due to the lack of enough time.
- Health and security are of growing importance to tourists; the destinations that have built an image of safe places, far from terrorism and diseases like the Asian flu, will have certain market advantages.
- Tourists will get more and more informed and sensitive towards environment protection issues. This will result in the growing demand for sustainable tourism products.
- The share of individual tailor-made offers will grow against packages and this will affect the work of tour operators and travel agents. Growing demand is expected for mixed products (nature and culture, nature and countryside, etc.).
- With the development of new destinations, competition will also grow and the professional and well-targeted marketing will be all the more important, especially in relation to destination identity.
- Internet and other technologies, incl. distant electronic payment systems, will continue to be of growing importance.

- When choosing a trip, the client will pay more attention to the so-called ‘inner determinants’ (e.g. self-enrichment of knowledge, experience, etc.) than to ‘outer determinants’ like demographic factors or climate.
- 70% of travel around Europe is still done by car. The growing share of low fare flights is affecting negatively bus transport. With the necessary investments to improve railroad networks, the latter can also grow in popularity.
- Visitors will expect more and more personal attention from their hosts, which will predefine the choice of destinations, places to stay and eat, guides and interpreters...

Sustainable tourism on the global scale

The available data quoted below is, unfortunately, very, very scarce; the reason is the lack of specialized market research on sustainable tourism in particular.

According to available information, sustainable tourism has shown growth rates of 20 to 34% annually since 1990, which is generally three times higher than the growth rates of tourism as a whole. The receipts from a ‘sustainable’ (‘green’) tourist are usually 3 times bigger than from a traditional tourist (in Dominica, for example, even 18 times bigger). With standard vacation packages, e.g. all-inclusive, about 80% of receipts leave the host regions, while sustainable tourism adds 95 to 100% income to local economy.

Profile of the ‘sustainable’ tourists:

- Travel a lot and have large experience
- Travel in small groups
- Generally higher educated
- With higher incomes
- Second and third age predominantly

- At responsible positions, opinion-makers
- Women prevail
- Preferences to combinations between traditional 'eco'-services, culture and history of visited places
- Preference to small hotels, guesthouses and huts for accommodation
- Most do not use the services of tour operators (a little over 50%)
- Major sources of travel information: 'mouth-to-ear', Internet, travel guidebooks and brochures
- Balance between short trips (3-4 days) and longer ones (8-14 days).

The World Tourism Organization (WTO) divides the sustainable tourists in three major categories:

- So-called 'hard' tourists (25%) – seek active holidays and adventure, other additional services are not that important;
- So-called 'soft' tourists (35%) – a more passive vacation, with interpretation of the natural and cultural heritage and other additional services;
- So-called 'mixed' tourists (40%) – behave like 'hard' ecotourists at day and 'soft' – at evenings.

Analyses of certain source markets (among which UK and Germany, leaders in Europe, as well as the USA) have shown that most tourists, regardless of the type of tourism they practice, are sensitive towards environment protection issues and expect tourism supply to take that into account. 65% of German tourists and 87% of UK ones choose offers that demonstrate distinct care for the environment and are ready to pay 5 to 10% more for that. Over 60% of USA tourists are ready to pay up to 150 USD more for such a service. Their expectations can be summarized as willingness to learn more about the social, cultural

and natural features of visited places; guarantees that their visit does not threaten the environment in any way and that accommodation establishments have some form of 'green' management policy, preferably proven by some eco-certificate. According to WTO, there are already more than 100 eco-certification schemes globally, although the number of their members altogether is not very big.

In response to these visitor expectations, about 3/4 of the tour operators on these markets have already developed a special responsible tourism policy. The first among them claim to already have certain economic advantages, e.g. the chance to offer higher prices. The most popular form of such a policy is the compilation of a written Code of Conduct for responsible tourism guiding the work of the tour operator and including, for example, donations or sponsorship for nature-protection initiatives or projects. Some companies even maintain their own donor funds for such projects. Another popular practice is the compilation of Code of Conduct for tourists themselves.

Important source markets for Bulgaria and Macedonia

These are the external markets – sources of existing or potential tourist flows towards Bulgaria and Macedonia. It is very difficult to distinguish the flow of 'traditional' tourists from that of 'sustainable' tourists which would give a clearer picture of demands and trends.

According to WTO, the Top 10 source markets in the world are (ranked by importance):

1. Germany
2. USA
3. UK
4. Japan
5. France

6. Italy
7. China (lately)
8. Canada
9. Russia
10. Netherlands (followed directly by Spain).

According to summarized data from the last decade, 90% of all travelers in Europe are Europeans; half of the rest are from USA and Canada. Japan and China have been evaluated as less important markets for Europe but with growing potential for the years to come. These trends are all the more true for Southeast Europe, where the share of intra-regional travel reaches 94%.

UK as a source market

The number of UK citizens traveling abroad is constantly growing, 4/5 of trips being in Europe and 2/3 of them made for vacation. In the last decade, interests have remained focused on Spain (26% of all trips), France and Greece (11% each), USA (11%) and Italy (5%) but British tourists are much more inclined than, for example, German ones to discover new destinations. Highest growth on that market has been demonstrated by Estonia, Lithuania, Poland, Slovakia and the Balkans, including Bulgaria and Macedonia.

An interesting trend on the British market is the drop of tour operators' turnover (by as much as 15%) against the raise of travel. This shows the growing willingness of British tourists to organize their vacation themselves (57%) instead of using the services of a tour operator or travel agent. They usually combine the longer annual leave with several shorter trips (thus making the average length of stay 8 days) and for these short trips they will continue to seek European destinations in the future.

The review of 87 independent tour operators, offering Southeast Europe at the British market showed that 22% of them are specialized on the geographical principle – for a

certain destination. Few of these are offering Bulgaria or Macedonia; more pay attention to Turkey, Russia and Croatia. The percent of specialized ecotourism companies (wildlife observations, walking and trekking, etc., including also adventure programmes) is about 13%, and 10% more offer mixed products with elements of ecotourism, e.g. nature and culture. In these two groups, there are only 2 big businesses with staff over 200 (managerial and guides); most are small businesses with office staff of 7 to 18 people and different but not big number of guides relevant to the destinations offered.

The programmes offered are quite different but could be summarized as follows:

Note: all prices hereafter are given per person.

- Wildlife observations (mostly birds) – biggest percent of offers for the Balkans. Shorter trips of 4-5 days and longer ones 8-10 days. Groups of minimum 4, maximum 14 people. From Bulgaria: Rhodopes, Pirin, the Black Sea coast and Danube for bird-watching, brown bears in the Central Balkan National Park. Package prices (land only): for 4-5 days between 800 and 1100 EUR; for 8 days – from 1320 to 1760 EUR.
- Walking tours of different difficulty, second biggest percent of offers for the Balkans. Duration 8-11 days. Groups of 6-12 people. Package prices (land only): from 680 to 950 EUR, depending on destination.
- Horse riding. Duration 7-10 days. Groups of 4-10 people. Noone offers Bulgaria or Macedonia, the nearest destination to us is Romania. Package prices for 8 days (land only): 900 to 1300 EUR.
- Adventure programmes (e.g. kayaking, caving, etc.). Shorter than other programmes, 4-5 days maximum, for groups up to 8 people. Package prices for 5 days (land only): 800-900 EUR.

- Mixed programmes (short easy walks, villages, culture) – third place in the offers for Bulgaria. Duration 8-10 days. Groups of 12-16 people. Package price for 8 days (land only): from 600 to 890 EUR depending on destination.

General observations: most commonly, the tour operators try to maintain similar prices of similar packages in different destinations, e.g. Bulgaria/France. Accommodation is arranged not in big hotels but in small ones, guesthouses and huts in the mountains. There are offers for all seasons. A distinct difference is visible in the quality of Web sites (design, structure, contents) of companies offering alternative tourism and the others. The comparison is in favour of the first ones. All companies have quoted on their sites a policy or Code of Conduct for responsible tourism, demonstrating their care for the environment. Some have been included in various schemes for ‘green’ certification and even ISO 14001, the Environmental Management Standard. No data is available about the number of clients/trips.

Germany as a source market

94% of German tourists travel mainly around Europe. For the last decade, the favourite destination has been Spain (16% market share), followed by Austria, UK, France and Turkey. According to the ETC, worst performance on that market has been demonstrated by Slovenia, the Netherlands, Hungary and Bulgaria. This is certainly an alarming fact as the German market continues to be among the most important for Bulgaria. On the other hand, Bulgaria is known at this market mainly as a destination for summer sea vacations, and the decrease of market share does not certainly mean that there is no chance for other types of tourist products. The average length of stay of German tourists abroad has been 8-9 overnights.

A review of tour operators offering alternative tourism on the German market has shown that only 6% of these offer this part of the Balkans as an ecotourism destination. To make a comparison, the packages for Romania are indeed two times less than those for Bulgaria

but for France they are 13 times more. The profile of companies is similar to the above described for UK.

Types of programmes and packages:

- Mixed tours (nature, culture and history) – over 90% of the supply for Southeast Europe incl. Bulgaria and Macedonia. Places from all over the countries are offered. Duration of programmes: 11-15 days; size of groups minimum 10, maximum 20 people. Package prices for 14 days (land only): from 1000 to 1300 EUR.
- Wildlife observations – alarmingly limited supply by 2-3 companies. The packages are very diverse: from 11-days tour for groups of 6-15 people, to individual one-week packages for 1-4 people. From Bulgaria: bird-watching at the Black Sea and wolves (unclear where); no offers for Macedonia. Package price for the 11-day tour (land only): 1390 EUR.
- Many and diverse experience trips in destinations closer to Germany such as France and UK (over 90% of the offers for these destinations). Programmes vary from 2-3 days – short trails, gastronomy – to 5-7 days with walking and cycling tours. Average size of groups for the second type of programmes – 15 people; the first is rather for families. Prices are also very different, for example: 6-day donkey tour in Merkantoir National Park costs 480 EUR, while 2-day family trip in the Pyrenees under the motto “No Cars Week-End” costs 289 EUR.

General observations: here, too, accommodation is arranged in guesthouses and family hotels mostly. Unlike the British market, major supply is concentrated in the warm half of the year.

France as a source market

France shows a trend similar to that in UK to spend annual leave in farther destinations, while short trips in the different seasons are undertaken in Europe. UK and Spain remain

the favourite destinations but lately Croatia tends to draw nearer to that group (50% annual growth). Many French travel as unorganized tourists out of the country. The review of tour operators offering ecotourism packages on the French market showed that 90% of these offers are domestic – in France itself. The Internet search of offers for Bulgaria and Macedonia gave several companies offering spa, ski and mountains, and all in all one tour operator (Allibert), who offers walking tours and mixed programmes (nature, culture and history), with duration of 8 and 14 days and for groups of 5-15 people. Package prices for 8-day programmes: 900 to 1100 EUR; for 14 days: 1200-1350 EUR. Mainly in the warm half of the year, although there are two winter programmes; accommodation in guesthouses and family hotels but also including huts and monasteries for some of the trips.

The Netherlands as a source market

The favourite destinations of Dutch tourists are France, Italy, Spain and Germany. It should be noted, however, that in the last decade, the Balkans have grown fast as a destination on that market. One of the important features of the Dutch market is the highest share of on-line reservations compared to other Western European markets. This is directly related to the fact that a negligible number of tour operators offer the Balkans on the Dutch market, and it is mainly for mass tourism.

Others

In recent years the **Italians** prefer destinations such as Turkey, Spain and Germany, with a growing interest towards Central and Eastern Europe, incl. Bulgaria and Macedonia.

Spanish citizens so far prefer their own country for vacation but show some interest for specialized trips to other countries in Europe (mostly cultural).

Russia shows stable growth in the travel of its citizens abroad, large part of which are to European destinations.

USA also show growth in their travel to Europe but it is due to the overall increase in the number of international trips; otherwise the market share of the Old Continent has decreased in recent years. There is bigger interest to Turkey, Greece and Cyprus, apart from that Eastern Europe is drawing only 4% of the USA flow. Prognoses for the future of the US market are quite controversial. The biggest traveling group is aged 30-40. Internet has a growing importance for travel motivation, followed closely by. The average duration of trip is either 8-9 days or 16 days. The search for offers from Bulgaria and Macedonia on the US market showed an extremely low presence, with cultural and city-break programmes, often in combination with other countries.

On the whole, **Japan** is showing a decrease in the trips to Europe, although some parts of the continent receive additional interest – Croatia, the Czech Republic, Hungary, the Balkans, together with Turkey and the traditional Western European destinations. Already 50% of Japanese travel as unorganized tourists, using the Internet as a main tool for information and bookings. Most trips are between 7 and 10 days (60%) and below 7 days (22%). Most popular are the offers providing opportunities to meet new cultures and lifestyles. The average age of travelers is over 50, and the percent of ‘frequent travelers’ or those who leave Japan at least once a year, is already above 50%.

‘Local’ source markets

Bulgaria and Macedonia are important markets to each other, and that is quite understandable. Greece and Serbia are significant source markets for both countries. Of course, shopping tourism holds a large percentage

The following summary on foreign visitors to Bulgaria and Macedonia can be made on the basis of available information:

- From the point of view of tour operators, foreign tourists prevail regarding wildlife observations, walking and even the mixed programmes (nature, culture, history). This is in direct relation with the fact that foreign tourists still visit Bulgaria mostly

with tour operators, although here, too, the global trend towards individual travel is visible.

- From the point of view of local suppliers, the average correlation domestic tourists / foreigners is 90/10, which supports the conclusion that the percent of foreign tourists visiting this part of the Balkans is still very small.
- Foreign guests predominantly belong to the so-called second (45-60) and third age (above 60). The small number of visitors coming for adventure are naturally younger, aged 20-40.
- They travel independently or in small groups, mostly couples without children. For some specific programmes, e.g. mixed (nature, culture), they might join a bigger group.
- Bulgaria and Macedonia are visited mostly by foreigners with average income.
- They use transport organized by the tour operator or rent-a-car.
- 2/3 are the visits in the warm half of the year, although there is trend towards a more even distribution of travel around the year.
- Preferred duration of programmes is either 9-10 days (with tendency of falling down to 7-8 days) or a short break of 2-4 days.
- The motif for travel is rarely just a 'vacation'; they are looking for the specific experience, introduction to local culture, etc.
- The popular sources of information are ranked as follows: Internet (about 40%), reliable travel guidebooks and tourist magazines (also about 40%) and last – the 'mouth to ear' advertisement.
- Preferred accommodation establishments are guesthouses and family hotels, but foreign guests insist on higher category and comfort.

- The additional services they are ready to pay for, except the ones directly related to ecotourism, include local culture, folklore, handicrafts and especially cuisine.
- Visitor satisfaction relates to hospitability, preserved nature/biodiversity and beautiful landscapes, authenticity of culture and delicious cuisine.
- Visitor dissatisfaction relates to the condition of roads and huts, insufficient information provision (signing, info boards, maps), the problem with solid waste and the pollution of rivers, the insufficient quantity and quality of additional tourist services.

Sustainable tourism supply by Bulgarian tour operators

	<i>Tour operator</i>	
1	<u>Spatia</u> Tour	Wildlife observations, incl. birds, walking and cycling, climbing, rafting (everything related to ecotourism) and cultural tours. Mostly foreign tourists. Groups of 4-14 people. Programmes of 4-14 days, the longer ones prevail. Price for 14 days (land only): 980 EUR; individual (1-3 people): 1150 EUR.
2	Zig Zag Holidays	Everything related to sustainable tourism, incl. ice climbing, horse riding, culture, rural mode of life. Individual tourists and small groups, Bulgarians and foreigners. Average duration of programmes 5 days but there are also week-ends and 16-day trips. Price for 5 days (B&B, public transport): 115 BGL.
3	Radetski Bureau	Walking, adventure and caving programmes. Mostly Bulgarian tourists. Programmes 2-8 days. Price for 3 days (staying in huts): 79 BGL; for 8 days: 180 BGL.

4	Cross the line	Rafting, cycling and horse riding, kayaking, etc. Bulgarian and foreign tourists, mostly individual. Short programmes of 1-4 days. Price for 3 days (no meals included): 149 BGL.
5	River Adventure	Adventure programmes (caving, rafting, kayaking, etc.). The Web contacts are outdated.
6	Bulgarian Roads	Adventure programmes (caving, ice climbing, etc.) in the mountains. Bulgarian and foreign tourists, mostly individual. Short programmes 1-3 days. Prices are given per type of service, e.g. caving – 80 BGL; ice climbing – 119 BGL (transport not included).
7	Balkanci	Various types of programmes – culture, history, horse riding and cycling, mixed ones (nature and culture). Mostly foreign tourists. Various duration of programmes. Price for a 7-day mixed tour in the Rhodopes (land only): 750 EUR.
8	Bulgarian Travel Bureau	Various types of programmes, incl. walking, cycling, horse riding. Mostly foreign tourists. Duration of programmes according to their types; e.g. walking of 8-10 days. Groups of 4-14 people. Price for 10 days (land only): 500 EUR.
9	Eco Monde	Rock- and ice-climbing, and other. Conservation projects. Bulgarian and foreign tourists. Small groups and individual. Short programmes 103 days. Prices are given per type of service, e.g. ice-climbing – 99 BGL (no meals and transport included).
10	Neophron Travel	Specialized tour operator for wildlife observations but also offers mixed programmes with wine and cultural history. Mostly foreign tourists. Duration from 5 to 13 days. Price for

		a Butterfly Tour 4-8 people (land only): 810 EUR.
11	Odysseia In	Everything related to sustainable tourism. Bulgarian and foreign tourists, smaller and bigger groups. Various duration of programmes. Price for 9-day bird-watching programme, group of 6-14 people (land only): 685 EUR.
12	Balkan Trek	Walking, wildlife observations. Mostly foreign tourists. Groups of 6-12 people. Average duration of programmes 8-14 days. Price for 10 days (land only): 899 EUR.
13	Ecobike	Cycling in the Rhodopes and Strandja. Only for German-speaking tourists (their Web site is only in German). Groups up to 15 people; programmes of 1, 2, and 7 days. Price for 7 days (land only): 549 EUR.
14	Pandion-D	Wildlife observations, walking and cycling. Mostly foreign tourists. Groups of 4-14 people. Average duration of programmes 8-10 days. Price for 10 days (land only): 1395 USD for wildlife observations; walking is some 100-200 USD less.
15	Penguin Travel	Walking, cycling and riding, wildlife observations. Mostly foreign tourists, Groups of 4-12 people. Duration of programmes 8 days. Price for bird-watching: 645 EUR; for walking: 410 EUR (land only).
16	Branta-Tours	Wildlife observations. Bulgarian and foreign tourists. Groups up to 8 people. Programmes of 8-12 days average, although there are also 1-day and 15-day programmes. Price for 8 days (land only): 780 EUR.

Domestic ecotourism markets

According to some information (although scarce) about the Bulgarian and Macedonian tourist markets, the following observations have been made:

- The main purpose of travel of domestic tourists inside the countries has been visits to friends and relatives. 41.1% of the 'last' travel made has had the same purpose. Second, of the so-called non-vacation trips have been trips to the villa (rural house, other real estate) and business trips. About 10% of travel has had a health motif.
- About 20% of all adult domestic tourists have done it for vacation. Most of them have had vacation in the summer, and 1/10 – in the winter or in both seasons.
- Different trips (with different purposes) have been taken by different groups of population. Those who have traveled for business have been predominantly men with higher education, living in the capital or district centers. Those traveling for workshops (trainings, conferences, etc.) have been mostly young people aged 18-35 with high education, living in district centers and small towns. For health purposes, those traveling have been predominantly older people (above 56), more women than men, citizens of small towns and villages with relatively lower incomes. All social and demographic groups have traveled to see friends or relatives but yet those living in the capital and in villages prevail, as well as the youngest (18-25) and the oldest (over 56). Those traveling to the villa (rural house, other real estate) are mostly over 36, living in the capital and district centers.
- The ones traveling for vacation have been predominantly adults aged 18-45, equally men and women with higher education, living in the capital and district centers, with personal income around the average for the country. When comparing summer and winter travel, the share of young people and citizens of smaller places have been higher in the winter.

- The purpose of travel has affected the other characteristics such type of transport, travel companions, accommodation establishments, places visited. There are certain differences between summer and winter vacations.
 - When traveling for vacation, they have used 15% more personal cars than when traveling for other purposes. 1/3 of non-vacation travelers have used a bus, and 1/5 of vacation travelers in the winter have used a train.
 - Family travel has strongly prevailed in vacations; while for other purposes they have traveled individually. Vacation travel with children or friends has taken a higher share in winter. For health purposes, most people have traveled only with spouse, while for business or training there have been more groups of colleagues.
 - Regardless of the purpose of travel, most travelers have stayed with friends or relatives. Hotel accommodation has been used in business travel, winter vacations and trainings/conferences. During summer vacations, the most popular accommodation has been private guestrooms.
 - It should be noted that the category of hotels used for vacation has often been higher than when traveling for other purposes.
 - Most Bulgarians and Macedonians have had their summer vacation in Greece. In winter, main tourist flows have been directed towards the mountains. Routes of those traveling for non-vacation purposes have been concentrated in the bigger (district) towns of the country, including the capitals.
- Among the most practiced activities during vacation (summer and winter) have been entertainment (night life), excursions, walks and some sports. As a whole, passive holidays have been more popular in the summer while winter tourists have spent their vacation much more actively (winter sports).

- In general, about 1/3 of generated income from domestic tourists has come from vacation travel. Second place is taken by receipts from those visiting friends or relatives – about 1/5 of all receipts. At the end come the receipts from domestic tourists traveling to their villa, rural house or other real estate although these have been the biggest number of trips.
- Average daily expenses have also been dependent on the purpose and duration of travel. In short trips, those traveling for business, vacation and excursions have had biggest average daily expenses. Vacation travelers have spent a lot on accommodation, meals, entertainment and shopping. Lowest expenses have had the ones traveling for health purposes, with the exception of ‘recreation activities’, which have been most expensive.
- The tourist product that domestic tourists have looked for is directly dependent on their age and homeplace. What is common among all tourists is the clean air of destinations. Younger tourists have been more interested in the beach, sun and sea, the opportunities for sports and fishing, and entertainment. The older ones, however, have shown preferences towards peaceful and calm environment, ethnographic monuments and monasteries. Those aged 36-55 have looked for both sea and mountains and, logically, for hunting. The citizens of the capital, as a rule, have demonstrated a taste for a bigger variety of tourism products. They have shown higher interest than others for all types of products except hunting, health, beaches and mineral springs.

The following summary on domestic tourists can be made on the basis of opinions of tour operators and managers/owners of tourist sites:

- Domestic tourists travel mostly independently, although some have started lately to use the services of tour operators or travel agents. In that case, they prefer the so-called tailor-made programmes.

- Most travelers come from the bigger towns of the country.
- The age belt for domestic tourists is 20 to 45/55 years, the group of those aged 30-50 being the largest one. Naturally, the ones traveling for adventure are aged 20-40.
- Domestic tourists travel with their family (with children) or with friends. There are also bigger groups 'by interest' such as school trips, clubs of interests and other.
- Most tourists have higher income than average.
- They use personal cars, rarely public transport.
- 2/3 of the visits are made during the warm half of the year, although there is a trend towards more even distribution of travel around the year.
- There are distinct preferences for week-ends (2-3 days) and short vacations of 4-6 days.
- Travel motives for about 70% of tourists are just 'vacation' – peaceful recreation in nature, preferably combined with cultural and historical sites; there is less demand for specialized programmes for wildlife observations or adventure, although the latter are gradually growing in popularity.
- The popular sources of information are ranked as follows: the 'mouth to ear' advertisement (about 60%), Internet (about 40% but growing) and printed materials/brochures (20% but decreasing).
- Preferred accommodation includes guesthouses and family hotels, with special attention paid to guests.
- The additional services that domestic tourists are ready to pay for include mostly eco-trails, visits to specific natural and historic sites and traditional homemade meals. Next come adventure and wildlife observations.

- Visitor satisfaction relates to hospitality, beautiful nature/ clean air, delicious cuisine and the good correlation quality/price.
- Visitor dissatisfaction relates to the same issues as with foreign tourists.

Summary

General profile of demand and supply

- On the global scale, the number of tourist travel is growing annually, although at a different pace in different years. Travel for sustainable tourism purposes is growing 5-7 times faster than the other types of tourism. Unfortunately, the situation in Bulgaria and Macedonia does not yet reflect the global picture.
- Tourist volumes of Bulgaria and Macedonia are modest in comparison to giants like Germany, UK and France (11 to 15 times lower), although the Balkans have reported growth on many markets in the last decade. Bulgaria is widely known as a destination for mass tourism – mostly sea and less winter ski tourism; and Macedonia is known as a mass cultural tourism destination.
- 4/5 of all arrivals in the world are intra-regional (e.g. Europe – Europe), which has been confirmed by the results for Bulgaria and Macedonia.
- The number of foreign tourists who have visited this part of the Balkans for sustainable tourism purposes has been a small percentage of all foreign visits (below 10%). Indirectly, it might be claimed that this percent have been rising with the years but it is impossible to say how much.
- As per the purpose of visit, data on foreign visitors might be summarized as follows: for wildlife observations – UK, less the Netherlands, USA and Scandinavian countries; for walking/trekking – UK, France, a lot less the USA and other European countries; for mixed programmes (nature, culture, history) – UK, Germany, France, and a very small percent from other European countries, USA

and Australia. The number of foreign visitors coming for adventure programmes is still very small.

- The number of domestic tourists traveling around their country for vacation has grown from 25% of the total number of travelers 15 years ago to over 60%.
- As per the purpose of travel, it is still traditional sea summer holidays and winter vacations that prevail. No doubt, however, that the demand for products, which are related to nature and culture and might be accepted as sustainable tourism is growing. Most common is the demand for vacations in nature, combined if possible with history and culture. Wildlife observations and adventure experience are still less popular.
- For now, most of foreign 'sustainable' tourists (70%) are organized, i.e. arrive via tour operators but the number of unorganized visitors is gradually growing. It must be noted that in their own countries these organized tourists are less than 50% of the travelers.
- In contrast, domestic tourists rarely use the services of tourist companies for domestic travel and even for traveling abroad, although tourist companies are used for distant places and sometimes for cheaper packages.
- Foreign tour operators offering this part of the Balkans for sustainable tourism, are concentrated primarily in the UK (30% of the independent tour operators there); a lot less in Germany (6%) and a practically negligible percent are to be found in France, the Netherlands and other European countries, as well as USA.
- Bulgarian tour operators offering sustainable tourism, mostly for foreigners but also for Bulgarians, are not a big number, about 10% of all registered tour operators. It was difficult to obtain such data for Macedonian tourist companies.

- The tour operators dealing with sustainable tourism both in Bulgaria and abroad are almost 100% small businesses, with staff up to 20 people (not counting the guides who might not be permanent employees). The several big companies related somehow to ecotourism (staff 100 people and more) are usually offering non-specialized mixed programmes – nature, culture and history.
- The packages that are being offered are quite diverse in terms of duration and might be divided in three groups: (1) 4-5 day programmes (most adventure trips fall into this category); (2) 8-10 days and (3) 14-15 days. Visitors generally show preference to the first two groups.
- The packages are being offered for groups that are not very big – generally up to 14 people.
- Package prices are also very different but the following conclusions might be drawn: most expensive are the wildlife observations (horse riding trips fall within the same price belt – if they are considered ecotourism), followed by adventure programmes, and least expensive are walking tours and mixed programmes. It is to be noted that Bulgarian tour operators sell generally cheaper than foreign ones, e.g. if a foreign tour operator buys a package from a Bulgarian one, it might add, in some cases, as much as 300 EUR per person.
- Foreign guests are predominantly of the so-called second (45-60) and third (above 60) age. For domestic tourists, the age belt is 20-45/55. Regardless of nationality, the admirers of adventure programmes belong to the group of 20-40 years of age.
- Foreign tourists travel independently or in small groups, mostly in couples without the children. For some specific programmes, e.g. mixed ones, they could join bigger groups. Domestic tourists travel mostly with their family, with children, and with friends.

- Most foreign visitors coming to this part of the Balkans belong to the group with average income while domestic travelers are predominantly with higher income.
- Foreign visitors use transport organized by the tour operator or rent-a-car while Bulgarians prefer their personal car and less – public transport.
- 2/3 of travel is made during the warm half of the year, although there is a trend towards a more even distribution in all seasons.
- Preferred duration of programmes for foreign visitors is either 9-10 days (with a trend towards 7-8 days) or 2-4 days. Domestic tourists seek for week-end offers and short vacations of 4-6 days.
- The ranking of information sources used by foreigners is Internet (40%), renowned travel guidebooks and tourist magazines (also 40%) and last – the ‘mouth to ear’ ads. For domestic tourists, on the contrary, the latter is of greatest importance.
- Preferred accommodation establishments are guesthouses and family hotels, foreign visitors being the ones insisting more on higher category and comfort.
- The additional services that foreign visitors are ready to pay for, are related to local culture, folklore, handicrafts and especially cuisine. For domestic tourists, preferences relate to eco-trails, history and homemade meals.
- Visitor satisfaction relates to hospitability, preserved nature/biodiversity and beautiful landscapes, authentic culture and delicious cuisine.
- Visitor dissatisfaction relates to the condition of roads and huts, insufficient information provision (signing, info boards, maps), the problem with solid waste and pollution of rivers, the insufficient number of additional tourist services developed.

Market trends

- Expected annual growth of tourist arrivals on the global scene by 2020 – average of 4-4.5%, with possible fluctuations. Of all world regions, Europe is closer to that growth rate. It is expected that the continent will preserve its global market share of about 50%.
- Continuing growth of the demand for sustainable tourism products and services. In Europe – mainly by Europeans.
- Steady bigger share of older tourists – aged 40 and above, plus the so-called third age, although the young tourists (aged 16-35) will grow in number.
- Health and security are of growing importance to tourists.
- Tourists are getting more and more informed and sensitive towards environment protection issues.
- The share of individual tailor-made offers is growing against packages and this will affect the work of tour operators and travel agents.
- Visitors are expecting more and more personal attention from their hosts and value for money, which means higher quality of service.
- Internet and other technologies, incl. distant electronic payment systems, are of growing importance.
- Although the high percent of car travel will sustain in the near future, the share of air travel is growing.

It is quite difficult to make a thorough market evaluation of the destination of Osogovo as there are no possibilities of a targeted and specialized market research; at the same time available data for visitor flows and profiles inside the destination is practically missing. However, the global market picture shows that (a) tourism is steadily growing worldwide and Europe holds a great share in it, and (b) given the trends in market

development, Osogovo is well positioned to claim a market share of its own. It will be naturally small, at least in the beginning, but against the current situation any development will be an improvement.

5. Levels of information provision and marketing

In recent years, most municipal administrations within the area have paid efforts to raise the levels of information provision for visitors, including the signage of sites, placing of information boards and arrows, and publication of various information materials. Tourist information centers or points are absent, and Internet information is scarce and unorganized – hence hard to find.

Marketing efforts are also not abundant and are mostly limited to various publications, electronic carriers and PR manifestations included in various projects, i.e. paid for by external sources.

The current levels of information and marketing provision for the region of Osogovo are quite low but in a situation where tourism is negligible this is not a major problem. Improvements must be made along with organized efforts for tourism development.

6. Implemented and running projects related to tourism

To Touch the Heart of Osogovo

Beneficiary: Municipality of Kriva Palanka; partner – Municipality of Dupnitsa. Funded by the IPA CBC Programme Bulgaria-Macedonia. Contribute to the sustainable development of the CBC region of Kriva Palanka – Dupnitsa through the building of new local infrastructure in Osogovo Mountains and the presentation of the tourist values of the region.

Mountains Touch Hands

Beneficiary: Municipality of Kriva Palanka; partner – Municipality of Dupnitsa. Funded by the IPA CBC Programme Bulgaria-Macedonia. Reconstruction of small-scale tourist infrastructure, incl. the building of the City Museum of Kriva Palanka; elaboration of tourism development strategies for the participating municipalities; establishment of a sustainable cluster for joint management and development of the natural, cultural and historical heritage of the region.

Under the Same Sky

Beneficiary: Municipality of Kriva Palanka; partner – Municipality of Dupnitsa. Funded by the IPA CBC Programme Bulgaria-Macedonia. Studying and promotion of the sacral heritage of the two municipalities and development of a GIS-based information system.

Lesnovo – a Location for Tourist Recreation with Aesthetic Values

Beneficiary: Probishtip Municipality. Funded by EU through the CARDS Programme. Improving small local infrastructure (parking lot; drainage system for water supply; sewage; visitor toilets with access for the disabled; sports points and socialization of public spaces); promotional activities incl. publications, press-conferences, familiarization trips and others.

Secrets of Lesnovo Churches and Caves – Attraction and Challenge for European Tourists

Beneficiary: Probishtip Municipality. Funded by EU through the CARDS Programme. Results: adapted school building for accommodation of visitors (12 beds, equipped kitchen and dining room) and exhibitions, ethnographic corner, education rooms; viewpoints showing beautiful panoramas of the Lesnovo Crater; walking trails and bridges providing access to the cave church and monks' caves. Creating conditions for partnerships between the public and the private sector; including the tourist locality in the tourist offers of Bulgaria and Macedonia.

Stimulation of Cross-Border Cooperation through Joint Strategic Planning of the Development of Cultural and Historic Tourism

Beneficiary: Morava-Pchinya-Struma Euro-Region; partners: municipalities of Kriva Palanka, Rankovce, Kratovo, Probishtip, Vinitsa, Delchevo, Kochani, Sveti Nikole and Berovo. Funded by the EU through the CARDS Programme. Strengthening local capacities for participatory strategic planning – developing action plans for tourism development for the participating municipalities.

Revealing Hidden Opportunities

Beneficiary: Center for Research and Policy Making; partners: municipalities of Delchevo (MK) and Blagoevgrad (BG). Building capacities for cross-border cooperation in the tourism sector in the two regions; collecting information and making analysis in working groups of local stakeholders; exchange of good practices, knowledge and skills.

Economic and Tourist Potentials of Osogovo Region

Lead partner: Municipality of Probishtip; partners: municipalities of Makedonska Kamenitsa, Kochani, Cheshino-Obleshevo, Kratovo, Rankovtse and Kriva Palanka. Funded by the Ministry for Local Self-Government. Studying and promoting the economic and tourist potential of the municipalities in Osogovo area.

Osogovo Eco Region

Beneficiary: Probishtip Civil Committee for Development. Funded by REC for CEE with funds from Europe Aid. Publishing training and promotional materials about the natural heritage of Osogovo Mountains.

Creating Prerequisites for the Basis of Tourism Development

Beneficiary: Center for the Development of the Northeast Planning Region. Funded by the Ministry for Local Self-Government (Bureau for Regional Development) through the Programme for Attractive Planning Regions 2009 and the Programme for Balanced and

Sustainable Regional Development 2009. Publications about the municipalities of the Northeast Planning Region of Macedonia: Kratovo, Kriva Palanka, Rankovce, Kumanovo, Lipkovo and Staro Nagorichane.

Development of Municipalities and Culture

Beneficiaries: Kratovo and Kriva Palanka Municipalities. Funded by the World Bank and the Ministry of Culture of Macedonia. Report prepared for needs assessment, research of cultural heritage and municipal strategies of Kratovo and Kriva Palanka. Projects funded in Kriva Palanka: Reconstruction of Parohiski Home and Sveti Nikola Church in Tarnovo Village, of the Rice and Wheat Stores, Vladichin Konak and Manastirski Han at Osogovo Monastery and of sacral sites (incl. the church of Sveti Nikola) in Gradets Viilage; construction of stone fountains and socialization of smaller sites. Projects funded in Kratovo: Reconstruction of the Old Hamam – Turkish prison, Sokolova Tower and Saat (Clock) Tower.

Ethno Room

Beneficiary: Cultural Center of Kriva Palanka. Funded by the Ministry of Culture, 2005. Purchase of valuable ethnographic items and arrangement of an exhibition called Ethno Room.

Development of Cultural Tourism in Osogovo

Beneficiary: Science and Art Society; partner: Regional Historical Museum of Kyustendil. Funded by the EU through the CARDS Programme. Publishing the study dedicated to Tsotsev Kamen, plus a CD and DVD with information; exhibition of the prehistoric heritage of the cross-border region (Kratovo, Kriva Palanka, Probishtip and Kyustendil); organization of a cross-border summer school; development of tourist offers and production of thematic souvenirs based on prehistoric heritage.

Cultural Heritage of Our Ancestors – Spiritual Mainstay of Our Common European Future

Beneficiary: Regional Historical Museum of Kyustendil, partner: Municipality of Kriva Palanka. Funded by the 2007 – 2013 Cross-border Cooperation Programme Bulgaria – Macedonia. Research of cultural heritage in the cross-border region; organization of an exhibition of the findings and two festivals with demonstrations of children's games from the past centuries and local cuisine and customs; publication of various information and promotional materials

Digital Culture for Regional Cohesion

Beneficiary: No Frontiers 21 Association; partner: Assembly of Associations for Technical Culture National Technique of Strumica. Funded by the IPA Cross-Border Programme Bulgaria – Macedonia. Studying

Improving the Quality of Life in the Municipalities of Belitsa, Bulgaria and Makedonska Kamenitsa, Macedonia, through the Preparation of Technical Investment Projects for Socially Significant Sites

Beneficiary: Community Center (Chitalishte) of Georgi Todorov, Belitsa; partner: Municipality of Makedonska Kamenitsa. Funded by the IPA CBC Programme Bulgaria – Macedonia. Development of three technical projects: for the church of Sveti Velikomachenik Georgi in Belitsa; the church in the village of Dulitsa, Makedonska Kamenitsa Municipality; and the Cultural and Information Center in Makedonska Kamenitsa.

Improving the Quality and Access to Natural Attractions in the Municipalities of Belitsa and Makedonska Kamenitsa

Beneficiary: Municipality of Makedonska Kamenitsa; partner: Municipality of Belitsa. Funded by the IPA CBC Programme Bulgaria – Macedonia. Laying asphalt on the road to Elenets Monastery above Tsera Village; making walking trails around it; socialization of the whole site; renovation of two of the buildings in the monastery complex; works in Belitsa Municipality: rehabilitation of a museum building in Belitsa and tourist

infrastructure with five sub-sites; development of a joint promotional plan for the two municipalities.

Preparation of a Feasibility Study for Development of Ski Tourism in the Mountain Parts of the Municipalities of Belitsa, Bulgaria and Makedonska Kamenitsa, Macedonia

Beneficiary: Community Center (Chitalishte) of Georgi Todorov, Belitsa; partners: Municipality of Makedonska Kamenitsa and Kamenitsa-Sasa Football Club in Makedonska Kamenitsa. Funded by the IPA CBC Programme Bulgaria – Macedonia. The main product is the Feasibility Study for development of Semkovo Ski-Resort in Bulgaria and Tsarev Vrv Ski-Resort in Macedonia.

Cross-Border Business Networking for Sustainable Growth

Beneficiary: Business Information and Consulting Center – Sandanski; partner: Center for Development of East Planning Region, Stip. Funded by the IPA CBC Programme Bulgaria – Macedonia. Establishing and maintenance of a joint information service system - JUMP (Joint Web-based Marketing and Business Promotional Platform); Establishing a Partnership Network for Cooperation between Business Support Organizations of the target cross-border region to aid and guide the development of SMEs of the cross-border region; Carrying out a series of capacity building and matchmaking events in support of the cross-border business cooperation between Bulgaria and Macedonia.

Identical in Cultural Differences

Beneficiary: Municipality of Rila; partner: Municipality of Kochani. Funded by the IPA CBC Programme Bulgaria – Macedonia. Exchanging good practices in the field of heritage protection; reconstruction of two cultural centers - the Ethno House in Kochani and the House of Cultural and Historical Heritage in Rila and their transformation into

places for demonstration and promotion of culture with the purpose to strengthen interest towards the cross-border region.

Improving the Quality of Life through the Promotion of Cultural Resources and Creation of an Attractive Cultural Center

Beneficiary: Tourist Fund Pirin; partner: Municipality of Kratovo. Funded by the IPA CBC Programme Bulgaria – Macedonia. Establishment of an active art center in the village of Delchevo (Gotse Delchev Municipality, BG) with crafts training courses; promoting the cross-border region as a tourist destination with an attractive cultural life (publications; work with the media, permanent exhibition of photos, paintings, souvenirs of wood, stone and natural materials), etc.

Improving the Tourist Infrastructure of Boboshevo and Kratovo

Beneficiary: Izvor Civil Association for Protection of the Environment, Cultural and Historical Sites and Human Health; partners: Municipalities of Boboshevo and Kratovo. Funded by the IPA CBC Programme Bulgaria – Macedonia. Developing small-scale infrastructure for tourist sites: the village of Slatino, Boboshevo Municipality and the Kuklitsi locality, Kratovo Municipality.

Electronic Challenge for Modern Education

Beneficiary: Alliance for Regional and Civil Initiatives – Blagoevgrad; partner: Handicap Plus – Kriva Palanka. Funded by the IPA CBC Programme Bulgaria – Macedonia. Developing knowledge and skills in tourism for standardized quality of services through: study of qualifications in the cross-border region; development of modules and materials for e-learning in tourism; development of Web-learning platform; promotion of the materials and modules and organization of a cross-border forum.

Cultural Exchange – Sharing Differences for United Future Cultural Development

Beneficiary: Nevestino Municipality; partner: Doyran Municipality (MK). Funded by the IPA CBC Programme Bulgaria – Macedonia. Studying, protecting and promoting the folklore heritage of the two municipalities and building strong cultural connections between the citizens.

Programme for Stimulation and Promotion of Sustainable Eco- and Culture Tourism Development in the Transboundary Region Kyustendil – Shtip

Beneficiary – Kyustendil Municipality; partner – Shtip Municipality. Funded by the Neighbourhood Programme between the Republic of Bulgaria and Republic of Macedonia – Joint Small Projects Fund. Rehabilitation of tourist trails; two new trails developed – one for horseback riding and one for cycling; restructuring of a municipal hut into an Environmental Information Centre.

Fashion, Music and Culture from Kyustendil and Shtip – from Youth Perspective

Beneficiary – Kyustendil Municipality; partner – Shtip Municipality. Funded by the Neighbourhood Programme between the Republic of Bulgaria and the Republic of Macedonia – Joint Small Projects Fund. Establishment of Youth Culture Club; development of Continuous Youth Culture Cooperation Programme.

Increase of Cultural Connections and Cooperation between Kyustendil Municipality and Leskovats – Basis for Cultural and Social Development of the Transboundary Region

Beneficiary – Kyustendil Municipality; partner – Leskovats Municipality. Funded by the Good Neighbour Programme between the Republic of Bulgaria and the Republic of Serbia – Joint Small Project Fund. Organization of seminars and workshops; Organisation of Open Air Competition of Artists with the participation of Bulgarian and Serbian artists resulting in a joint exhibition of the artists from both countries; Establishment of Cultural Information Centre, located in the building of the Bratstvo Chitalishte in Kyustendil.

Encouraging Sustainable Economic Development through Optimal Use of Local Natural Resources for Environmentally-friendly Business Activities in the Transboundary Region Kyustendil – Leskovats

Beneficiary – Kyustendil Municipality; partner – Leskovats Municipality. Funded by the Phare Neighbourhood Programme 2005 Bulgaria – Serbia: Sustainable Economic Development. Production of a detailed spatial plan of an Osogovska Mountain fragment; production of a general tourism development plan of the trans-boundary region Kyustendil – Leskovats.

Tourism Without Borders

Beneficiary – Kyustendil Municipality; partners – Shtip and Kriva Palanka Municipalities. Funded by the Cross-border Cooperation Programme between the Republic of Bulgaria and the Former Yugoslavian Republic of Macedonia. Results: 8 installed and functioning info-terminals, 4 of which situated in the town of Kyustendil, 2 in Kriva Palanka, and 2 in Shtip; development of advertisement strategy for the promotion of the cross-border region Kyustendil – Shtip – Kriva Palanka with the goal of increasing the tourist flow; examination and identification of the locations and sites which are to be included in the data bases of the info-system.

Turning the Lines of Division into Points of Convergence

Beneficiary – Kyustendil Municipality; partner – Strumitsa Municipality. Funded by the Cross-border Cooperation Programme between the Republic of Bulgaria and the Former Yugoslavian Republic of Macedonia. Restoration of General Zhekov's villa hideout in the Hisarlaka Park and development of the neighbouring area; asphaltting of a dirt road and rehabilitation of an existing one leading to Sveta Troitsa Monument with an ossuary of the dead; within the municipality of Dojran: Reconstruction and preservation of military sites of historical importance from the First World War (4 bunkers, barracks, and trenches); reconstruction and transformation of a public building in Dojran into a museum, dedicated to the First World War; study, collection, and production of

documents connected to military activities which happened on the territory of the project and their permanent display in the museum exhibition (in Kyustendil and in Dojran simultaneously).

Bike Lanes for the Citizens and Guests of Kyustendil and Kriva Palanka

Beneficiary – Kyustendil Municipality; partner – Kriva Palanka Municipality. Funded by the Cross-Border Cooperation Programme, Republic of Bulgaria – Former Yugoslavian Republic of Macedonia 2007 – 2013. Construction of a cycling lane in Kyustendil with length of 2931 m and width of 2 m, as well as partial reconstruction of the sidewalk / street network; construction of a cycling lane in Kriva Palanka; joint research and data collection for the conservation of natural resources; organising a regional informative days event with the topic of Cycling and Environment.

Osogovo in the Green Belt

Beneficiaries: Bulgarian Biodiversity Foundation and Macedonian Ecological Society. Funded by the Frankfurt Zoological Society, Germany, and Pro Natura, Switzerland. Construction of a GIS with a data base for Osogovo, monitoring of large predators, with a focus on the lynx, field trainings for biology teachers from Kyustendil, an Osogovo Olympiad for students with summer camp for reward, preparation of proposal for protected area improvements in Osogovo, educational trips for local stakeholders to active protected areas practicing sustainable development in Bulgaria and Serbia (Stara Planina Nature Park, Vitosha Nature Park, Tsentralen Balkan National Park, Belasitsa Nature Park), work meetings and exchange of experience in the field of conservation and sustainable forest use for forestry employees in Bulgaria and Macedonia.

Kyustendil-Nevestino-Zemen Destination – Nature, Traditions, and Millenia of History

Beneficiaries – Municipalities of Kyustendil, Nevestino, and Zemen. Funded by the Regional Development 2007 – 2013 Operational Programme. Developing integrated

tourism packages; developing sightseeing routes based on the developed tourism product (maps with trails, programmes for visits organized by days and equipped with description of the sites, etc.); advertisement activities, information and advertisement materials (in Bulgarian, English, German, Russian) for the tourism region Kyustendil – Nevestino – Zemen and the tourism product called Strategia Danteletika; participation in events (international, national or regional tourism fairs and exposition); organization of national info-tours with tour operators from leading agencies, travel agencies and journalists; organization of tourism forums for encouraging effective bilateral communication.

Green Cross-Border Zone – Investment in Nature

Beneficiary: Kyustendil Municipality; partners: Surdulitsa Municipality and Kyustendil Chamber of Commerce and Industry. Funded by the Cross-border Cooperation Programme between the Republic of Bulgaria and the Republic of Serbia. Preservation of the typical natural resources in the cross-border region of Kyustendil – Surdulitsa and transformation of unutilized potential in resources that provide economic and social benefits to the local cross-border communities; restoration of Ezerata Eco-park in the town of Kyustendil through sanitation and reconstruction of the adjacent water area and construction of eco-friendly exposition areas with educational focus; reconstruction of the existing administrative building located within Vlasina Protected Area and its transformation into an environmental conservation information centre.

An Open Door for Cultural Exchange – Establishment of Mutual European Future

Beneficiary: Kyustendil Municipality; partner: Bogdantsi Municipality. Funded by the Cross-border Cooperation Programme between the Republic of Bulgaria and the Former Yugoslavian Republic of Macedonia. Renovation and furnishing of Creativity Center (the so-called Site 366) in the town of Kyustendil; renovation and furnishing of Cultural Centre in the town of Bogdantsi; organization of two cultural events in the town of Kyustendil: Kyustendil – Bogdantsi Cultural Days and Kyustendil – Bogdantsi Art Days; development of a communications strategy for publicity of the project.

The Acropolis of Pautalia – Journey through the Centuries

Beneficiary – Kyustendil Municipality. Funded by the Council of Ministers of Bulgaria.

Reconstruction of the fortress wall in Hisarlaka: 3 towers entirely, 8 towers partially, stone walls; lapidarium with amphitheatre.

A significant number of projects related to tourism development have been implemented in the region of Osogovo in the past 15 or so years. They have involved all the municipal administrations plus a large number of non-governmental organizations and other actors. A lot of improvements have been achieved as a result, including infrastructural developments, exchanges between partners and people on both sides of the border and raised promotional levels. Sustainable tourism development, however, requires more time and constant efforts as it is a bottom-up development by default, and the change in local people is the slowest change possible.

Annex IV

LIST OF INFORMATION SOURCES

- Environmental Local Action Plan of Kriva Palanka Municipality, 2004
- Environmental Local Action Plan of Rankovce Municipality, 2008
- Environmental Local Action Plan of Kratovo Municipality, 2008
- Strategic Plan for Local Economic Development of Probishtip Municipality, 2007
2013
- Local Economic Development Plan of Delchevo Municipality, 2007 – 2012
- Environmental Local Action Plan of Probishtip Municipality, 2009 - 2015
- Valorization Study with Proposal for Designation of Osogovo Mountains Protected
Area, MES, 2012
- Tourism Development Strategy and Plan, Kyustendil Municipality, 2010 – 2015
- Strategy for Mutual Protection and Management of the Environment in the Cross-
Border Region of Kyustendil – Surdulitsa, 2014
- Strategy for Development of Rural Tourism in the Municipality of Cheshinovo-
Obleshevo, 2007
- Osogovo Region Brochure published by Probishtip Municipality, 2012
- Osogovo Region – Resources and Development Opportunities Brochure published
by Probishtip Civil Committee for Development, 2005
- Osogovo Tourist Guide, Kiro Gerasimov, 2009

Annex V

ANALYSIS OF OSOGOVO TOURISM

I. Strengths of Osogovo Region as a Biosphere Reserve AND a joint tourism destination

I.1. Favourable geographical location

The geographic location of the Osogovo Region, though a serious liability in the not so distant past of the Iron Curtain, is quite an asset in the modern world of uniting nations. The region is easily accessible from all sides; it has the advantage of uniting two countries; and it is conveniently close to the capitals of both – respectively to the biggest domestic markets and the entrance gates for the foreign markets via the international airports of Sofia and Skopje.

I.2. Interesting landscape

The landscape of Osogovo Mountains may not be unique for the Balkans but it has features of sufficient interest to be used as a tourist resource – there are seven landscape types that may be easily and attractively interpreted. The mountain itself and the broader area of the adjacent municipalities host some very specific sites that may serve as a focus of tourist interest.

I.3. Good climatic conditions

The climate of Osogovo Region is no more or less favourable than any other mountain in that part of the Balkans. It provides sufficiently good conditions for the development of many types of tourism.

I.4. Abundant water resources

The water resources of the Osogovo Region provide excellent potential for the development of various tourism services, incl. some water sports, fishing, spa and the simple pleasures of recreation.

I.5. Valuable biodiversity

The plant life of Osogovo as a tourist resource possesses a significant degree of attractiveness to serve as a basis for the formulation of modern tourist services and products. The area of Osogovo has a great potential to develop tourism products based on the diversity and values of its animal life as well. It has charismatic species that are of general interest not only to bird watchers or other customers with specialized interests but to the general public as well.

I.6. A good network of protected areas and sites

Protected nature territories are a mark that a certain place has something valuable and thus interesting to learn about. They are often a focus of contemporary tourism. The broader region of Osogovo has a good potential to develop products and services connected to its protected areas and sites.

I.7. Precious historical sites

The region of Osogovo is quite rich in archaeological sites from various historic periods; some of them are extremely valuable. The renowned and suitable for tourist visits sites are quite sufficient as quality and quantity to form a comprehensive tourism product.

I.8. Numerous religious sites

Among the religious sites in the Osogovo Region, there are some really precious ones in terms of tourism potential. There are also other sites that could form a specialized tourism product. However, one must be very careful with the ‘Churches and Monasteries’ theme as it is very tricky to achieve a marketable balance.

I.9. Museums with potential

The museum network of Osogovo Region may not be very well developed but there are museum sites of real interest and potential. It should be noted that the town of Kyustendil is a unique exception from the general picture as it possesses one of the best museum networks in Bulgaria for such a mid-sized town.

I.10. Well preserved folklore heritage

The folklore heritage of the Osogovo Region is rich and colourful, and sufficiently preserved as a tourism resource but should be exploited very carefully when packing tourist services so that a marketable product is developed.

I.11. Rich cultural agenda

The cultural calendar of Osogovo Region is both well established, full of traditional and well known events, and diverse as types of events – folklore, modern music, arts, sports, etc.

I.12. Great potential of traditional lifestyle

There are many traditional practices from the region of Osogovo that may be utilized as a tourism resource, especially those related to food and drink production, as well as farming and stock-breeding. Local cuisine also has some specifics that may create marketing advantages.

I.13. Acceptable status of general infrastructure

The status of general public infrastructure in the region of Osogovo is not a limitation factor for the development of tourism. Supply of electricity, water and communications is secured; and sewage is available at least in the municipal centers.

I.14. Sufficient resources of basic tourism services to start with

Basic tourism services (accommodation and catering) in the region of Osogovo are sufficient for the time being given the fact that even the existing ones are not efficiently utilized.

I.15 A good resource of existing tourist trails

There is quite a good number of existing trails on the territory of Osogovo, both walking and cycling. They connect interesting sites and places, natural as well as historical.

I.16. Sufficient capacity of stakeholders

There is a sufficient local capacity to start an organized and structured development of Osogovo Region as a tourist destination. There is of course a shortage of experience, knowledge and skills at some points but with high levels of motivation and partnership good results can be achieved.

I.17. Favourable global market situation of tourism

The global market picture shows that (a) tourism is steadily growing worldwide and Europe holds a great share in it, and (b) given the trends in market development, Osogovo is well positioned to claim a market share of its own. It will be naturally small, at least in the beginning, but against the current situation any development will be an improvement.

I.18. High percentage of utilization of available financial sources

A significant number of projects related to tourism development have been implemented in the region of Osogovo in the past 15 or so years. They have involved all the municipal administrations plus a large number of non-governmental organizations and other actors. A lot of improvements have been achieved as a result, including infrastructural developments, exchanges between partners and people on both sides of the border and raised promotional levels. Sustainable tourism development, however, requires more time and constant efforts as it is a bottom-up development by default, and the change in local people is the slowest change possible.

II. Weaknesses of Osogovo Region as a Biosphere Reserve AND a joint tourism destination

II.1. Transport isolation

Despite the acclaimed importance of E8 European Transport Corridor, the Osogovo Region is somewhat isolated; there is a limited passenger flow that could be turned into a tourist flow through various marketing measures.

II.2. Access to many places of interest is not good

This is especially true for the sites that are in or near villages, and especially the more isolated ones. Localities such as Tsostev Kamen or Ratkova Rock which are invaluable as a resource are hard to reach and therefore their 'selling' as tourist products/ services is rather limited.

II.3. Poor condition of many historic sites

Most of the historic sites in the region of Osogovo are not socialized for tourist visits, inaccessible or in poor condition. There are places such as many of the isolated mountain villages that still have old houses which will surely be of interest to a specific audience; the problem is access and the poor condition of most of the places.

II.4. Museums are not managed as tourist attractions

A modern museum service needs to be developed for all the existing museum sites in Osogovo Region; at present they are not managed to answer the demands of contemporary tourism. Special attention needs to be paid to the accessibility of museums as most the sites in the MK part of the region are not signed and marked, i.e. hard to find, and not even opened for most of the time.

II.5. Crafts heritage is not utilized at all

The crafts that are marketable from the Osogovo Region are not unique in the scope of Bulgaria and Macedonia and should either be used as a product diversification tool, or for souvenir production, or a new approach should be developed that would create a unique selling point.

II.6. The cultural agenda is not touristic

The rich events calendar of the Osogovo Region needs better valorization in terms of tourism supply. Selected events with greatest potential must be transformed from celebration for the local people into tourist events that can be marketed successfully.

II.7. Negative demographic trends

The broader region of Osogovo (the territories of the 10 municipalities in question) was quite well populated in the past – 288 settlements have been established and maintained to reach the present day. Unfortunately, the current tendencies are extremely unfavourable – heavy depopulation; migration of young people and ageing of population as a result of that; dying villages (especially the mountain ones); loss of livelihoods and traditions; high levels of unemployment and low standards of living. This makes the provision of human resources for the development of tourism in Osogovo Region quite risky, especially given the fact that the only specialized educational institution that could provide professionals for that branch is the Tourism High School in Kyustendil.

II.8. Road network needs improvement

The road network of the region of Osogovo is sufficiently developed but insufficiently maintained. Despite the efforts of the local authorities in recent years to utilize every financial opportunity that becomes available and invest in infrastructure, the condition of many of the rural roads is still quite poor. Access to many potential tourist sites, especially near distant villages, is questionable.

II.9. Public infrastructure needs improvement

The age of the carrying systems and the lack of purification plants may pose a risk to the quality of drinking water; the lack of sewage infrastructure may create difficulties for the development of some tourist facilities; and the lack of wastewater treatment establishments is a threat to the overall quality of local environment which modern tourists are sensitive to. In addition, there is a serious problem with unregulated solid waste depots which are sometimes located right next to roads and present a source of all kinds of unpleasant or hazardous effects.

II.10. Public services need improvement

The fact that public services are concentrated in the municipal centers of Osogovo Region can only be a problem in case of tourism initiatives and development in places that are quite distant from those centers. Existing sports facilities are not actually utilized as tourism resources and some of them are not in a very good condition.

II.11. Disproportion in the development of basic tourism services

There is an obvious disproportion in the supply of basic tourist services (accommodation and catering) around the region of Osogovo. The biggest concentration of such services is in Kyustendil Municipality and especially the town of Kyustendil itself while the neighbouring municipality of Nevestino has almost zero supply. In the MK part, services are concentrated in the municipal centers as well. Disproportion is also visible in the existing types of accommodations – hotels and motels are most common while guesthouses (and rural establishments in particular) are practically absent. Existing capacities may seem scarce outside of Kyustendil but the fact is even they are not utilized efficiently.

II.12. Existing tourist trails are not maintained as a network

There is no common policy about the maintenance of the tourist trails or their improvement as a tourist service. The supportive infrastructure for cycling trails is not present (e.g. bike repair and maintenance services). The condition of signing and marking

of trails, as well as their safety status requires a lot of improvement too. There are no thematic or interpretative trails which are an integral part of contemporary tourism.

II.13. Low level of additional tourism services

The additional tourism services in the region of Osogovo are poorly developed at this point. Guiding services, animation and heritage interpretation are practically absent. The visitors are expected to simply go and see various sites for themselves which firstly requires a better socialization of the sites and secondly brings no money to local economy. No demonstrations or tasting or dramatization, etc. are offered.

II.14. Lack of statistical information on tourism flows

It is quite difficult to make a thorough market evaluation of the destination of Osogovo as there are no possibilities of a targeted and specialized market research; at the same time available data for visitor flows and profiles inside the destination is practically missing.

II.15. Insufficient information and marketing provision

The current levels of information and marketing provision for the region of Osogovo are quite low but in a situation where tourism is negligible this is not a major problem. Improvements must be made along with organized efforts for tourism development.

ANNEX VI

SOME BASIC TERMS

Sustainable tourism is not a type of tourism. It is an approach to the development and management of tourism that takes into account the long term planning of resources, sensitivity to the environment and the well-being of local people. Understanding the connection between tourism, the local economy and the environment is fundamental to this approach.

The contribution of tourism to the local economy in the long term depends upon maintaining the environmental qualities that visitors increasingly come to enjoy. There are many examples in the world where this relationship has not been observed, where tourism has caused lasting damage to the environment and, in consequence, to the local economy.

Sustainable development of tourism means developing tourism facilities and services which:

- have no adverse impact on the environment, historic and cultural heritage or quality of life of local communities;
- are based on a region's natural, historic and cultural heritage;
- are manageable by local people and contribute directly to the local economy, and;
- are economically viable and can be sustained in the future.

Developing *the infrastructure* for sustainable tourism involves:

- making environmental improvements such as removing litter, reducing pollution and caring for public spaces;
- improving access to countryside, forests, national parks, wildlife areas, heritage and historic sites, consistent with the needs of conservation;

- promoting traditional crafts, arts, music in museums, craft shops and other outlets;
- interpreting the natural and historic heritage for visitors;
- promoting events and activities that are special to the area;
- improving standards of accommodation;
- encouraging the use of local produce and products in restaurants;
- co-ordinating a marketing strategy, and;
- enabling local communities to develop and manage tourism activities.

Alternative Tourism forms are called such as they are an alternative to the mass tourism (ski, sea, etc.) in terms of attitudes towards tourists, the specific services that are offered and the places that are visited. As a whole, the ‘alternative’ tourist programmes are practiced in small groups and are shorter but the tourist expects to receive attention at any moment which is reflected in the higher price of services. The alternative types of tourism include rural, eco, trekking, adventure, cultural (based on religion, crafts, customs, traditional cuisine, wine, folklore, etc.).

The tourist product is the combination of all services that the tourist receives during travel. It includes basic tourism services and additional tourism services.

The basic tourist services – accommodation and catering – are of great importance but it is wrong to assume that the existence of a well-equipped house or hotel is sufficient for the creation of a visitor flow. There are people who expect to find everywhere they go the same level of comfort they are used to at home or in the big city. Most ‘green’ tourists, however, are prepared to accept a basic standard of accommodation and catering as long as hygiene is at high levels and everything works.

The additional tourist services are specific for every individual place and the more they differ from the services in the neighbouring location, the better. It is important that the

visitor is equipped with information materials or offered a guide who knows the region well. Here are some examples:

- visit to the local church, monastery, chapel, sanctuary (or those in a neighbouring region); information about the history of the place; myths and legends related to it;
- trail to nearby natural sites – centuries-old trees, waterfalls, rock phenomena and so on;
- horse-ride or cart-drive to farther locations where one could gather herbs, mushrooms or forest fruits; the visitors would love to have a homemade yoghurt for dessert topped with fruits they have gathered themselves;
- picnic – if there is some water reservoir nearby, lunch could be arranged with fish visitors have caught themselves;
- visit to a local traditional celebration (might be out of urban areas) – a holiday of some saint, especially patron saints of local churches, or more specific holidays such as the Mummers' Games around New Year;
- demonstrations of the preparation of local food and drinks such as the making of rakia or wine, the path of the bread from sowing through harvesting to baking;
- demonstrations of local crafts – pottery, wood-carving, loom-weaving, etc.; a very important touch is the option for visitors to make their own souvenirs;
- demonstration of local folklore – songs, dances, rituals, tales and legends.

Packing of the tourism product. Every region has a vast circle of opportunities to offer something interesting to the visitor. When there is insufficiency of resources or attractions, new ones can be 'constructed'. It is also important that one and the same resources can be packed in different ways, so that new attractive offers might be offered.

Tourism products can be grouped as follows:

- *combined* – offering a large variety of opportunities related to rural lifestyle and nature and historical heritage, etc. this is a way to attract a largest circle of visitors.
- *themed* – or organized around a leading topic such as ‘The Path of Wine - from the Vineyard to the Glass’ where visitors are offered the chance to observe and take part in every stage of wine production with an option to taste their own ‘product’ at the end.
- *for a certain type of visitors* – a good example are the Friends of Bulgarian Folklore Clubs in Japan or green summer schools for the city children, etc.

Of tremendous importance is to determine the exact (marketable) price of the separate services and the whole tourism product. After the product is packed, it must be advertised and sold. The steps that have to be taken on the spot, include the information provision and the training of local service suppliers.

Marketing, in the context of tourism, is *the process of promoting and selling products and services*.

How those products and services are promoted must be defined in a marketing strategy. Otherwise, the development of tourism will be dictated by the market rather than by the wishes of local people and organisations. Developing a marketing strategy will enable decisions to be made locally about:

- the potential of their area for sustainable tourism;
- what aspects of the area they want to be promoted;
- how, and to whom, they want the area promoted, and;
- whether the focus of existing tourism activity needs to be changed.

In this way, local people can influence the development of tourism in their area rather than having tourism imposed upon them by the market. Even the focus of existing tourism

products like skiing can be adjusted by promoting folklore events, craft demonstrations and visits to local attractions.

Market research simply means acquiring knowledge about the market for products and services. It includes finding out where visitors come from or could be attracted from, what their expectations are and what they thought of their visit.

Market research can be expensive but useful things can be achieved with limited resources. Simply asking hoteliers about their guests or encouraging them to keep simple records of where visitors have come from, how long they stayed and at what time of year will produce valid and useful information.

A small amount of accurate information is more valuable than a large amount that is either inaccurate or too detailed to be processed or kept up to date. Information is only as valuable as the capacity that exists to use it. Luckily, in recent years it has become easier to acquire all kinds of information, through the Internet.

The Process of Market Research

The key stages in the process of market research are:

- defining purposes and objectives;
- identifying sources of information;
- designing the research;
- implementation;
- analysis of the results, and;
- taking action upon the conclusions.

Purposes and Objectives

The purpose of market research is to provide information that will be used in making decisions or developing strategies. It is, therefore, important to identify exactly what information is needed and why. Otherwise, time and resources will be wasted in accumulating information of little or no practical value.

Sources

A great deal of time may be saved by identifying information that is already available. Tourism colleges and departments of universities may be good sources of advice and information, as well as tourism associations and information centers and – of course – the Internet.

Surveys

Visitor surveys can provide important information about visitors; where they came from, what they felt about an area, how much they spent, whether they would come back and so on.

A survey can be quantitative or qualitative. Quantitative research is concerned with describing and measuring things, like visitor numbers. Qualitative surveys deal with attitudes and opinions. They are usually undertaken by face to face or telephone interviews and postal self-completion surveys depending on the subject to be researched, the budget and time constraints.

Surveys could be undertaken over a geographic area or at specific events and visitor attractions depending upon the purpose of the survey and the information that is required. If resources are available, there are a number of well-established marketing companies that could help with the survey.