

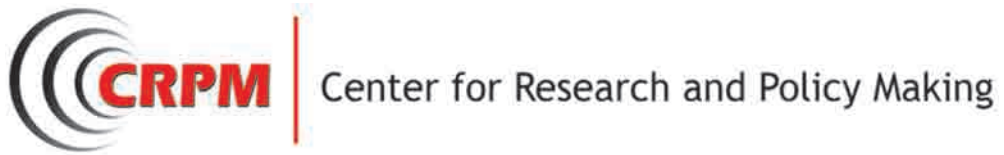


Center for Research and Policy Making

Developing Tourism in Delchevo



*The Tsar's Village
at the end of the road*



Research | Analysis | Trainings | Policy advice

Developing Tourism in Delchevo

„The Tsar's Village at the end
of the Road“

Developing Tourism in Delchevo

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About the publisher

The *Center for Research and Policy Making* is an independent, non-profit policy research institute founded in March 2004. *CRPM* consists of local researchers as well as external consultants in close contact with the organization. It offers timely, provocative policy analysis on the most pertinent issues. *CRPM* has no 'hidden agenda' but works to promote democratization and economic transformation of the country. It has no party, political or any other organizational affiliation. *CRPM* develops a new style of policy analysis and serves as a forum for young Macedonians to acquire and apply knowledge and skills for evidence based research and policy analysis. The standpoint from which it approaches certain issues is principled. The organization considers peace and stability as the first principles that should reign in the Balkan countries, and believes that the major Macedonian political good is the integration with the European Union.

The *Center for Research and Policy Making* has been formed by a multi-disciplinary team bringing together people with different backgrounds and professional and research interests, and includes considerable experience of the way the Macedonian policy process works. The *CRPM* members are specialized in project management and policy research and analysis, training and capacity building, and policy advice. They are able to coordinate the planning of activities and inputs in a flexible and effective manner, provide relevant and timely analyses anchored in political and economic realities, paying particular attention to timely mobilization of resources and monitoring of project progress.

CRPM key-departments specialize in research and analysis, program evaluation, training and capacity building, surveying and market research. The team has wide experience and evidence to offer policy advice in the following sectors: EU integration; municipal development; public finances; reform of the education, health and social protection policy areas; youth and cultural policy development; reform of the public administration and creation of public value.

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Preface

Dear Sir/Madam,

The development of a modern municipality requires the usage of various modern and exact development tools. The Center for Research and Policy Making (www.crpm.org.mk) is proud that with its products and research follows and assists Macedonian municipalities' quest to develop and modernize.

Following the changes to the Law on Administrative Boundaries Macedonian Municipalities strive to improve their services. Yet they still face numerous financial problems. Trying to solve these problems some municipalities successfully use donors funds, while others do not use them at all.

The failure to use European and other donors funds is a deficiency that can be overcome with the assistance of partners such as the Center for Research and Policy Making. This study is an excellent example of a successful cooperation between the municipality of Delchevo and our think tank.

Our study consists of a detailed analysis of the current socio-economic conditions in the municipality of Delchevo, the potentials for growth, the strengths and the weaknesses, main problems and recommendations for improvement. The data gathered through our research and the analyses made are easy to measure and assess, while the recommendations are practical and applicable. In the best of circumstances following the recommendations of this analysis would help Delchevo become one of the most important regional tourist centers.

Cooperating with the civil society organizations and the municipalities in using the foreign aid for development of municipalities around Europe is a good example to be followed. With this publication the Center for Research and Policy Making seeks to deepen its work with the Macedonian municipalities. Our think tank aims to be their strategic partner that works on development and improving the local socio-economic conditions throughout the country. The Center for Research and Policy Making is a friendly to the Macedonian municipalities organization. We want to assist the municipalities develop and this publication is only an example of our vision.

Sincerely,
The Center for Research and Policy Making

Developing Tourism in Delchevo

„The Tsar's Village at the end of the Road“

1. Introduction: Historic Development

Delchevo, a small town of 11,500 citizens, is situated in the Northeast part of the country, along the Bregalnica River and between the mountains of Golak and Vlaina also bordering the Osogovo and Maleshevski Mountains. The town which is also seat of the same named municipality lies at 620 meters above sea level. It takes two and a half hours to travel the distance of 170 kilometers from Skopje to Delchevo. The road at times is very narrow passing through treacherous mountain terrains. Bulgaria on the other hand is ten kilometers from Delchevo, the nearest town of Blagoevgrad. About half of the municipality is covered by forests.

Although archeologists discovered that there was life in Delchevo since at least 5000 years BC, the town for the first time was mentioned as “Carevo Selo [The Tsar’s Village]” in an edict of Tsar Dushan in 1347. According to local legends Delchevo during Byzantine rule was known as “Vasilevo”, while during Ottoman times it was known as “Sultanija [the town of the Sultan].” In 1950 in socialist Macedonia, the communist leaders, using the same imposing traditions as their predecessors, named the town according to the leader of the Macedonian national liberation movement IMRO [Internal Macedonian Revolutionary Organization], Goce Delchev. During his reign as a teacher in the nearby Novo Selo, Delchev recurrently visited Delchevo enlarging the clandestine network of IMRO.

After the Second World War the municipality of Delchevo had two towns and 28 villages. During the centuries the ethnic make up of Delchevo frequently changed. Due to the Ottoman rule the town had a large Turkish population, 5706 persons in 1953. Many left during the 1950’s when an emigration agreement between Turkey and Yugoslavia was made that had Turks and other Muslims that declared themselves such leave socialist Macedonia for Turkey.¹ Thus the number of Delchevo Turks by 1961 decreased to 875. Today their number is even lower, the absolute majority of citizens comprised of ethnic Macedonians with a few Roms, Turks and Serbs.

Delchevo Municipality Population 1921-2002

| Year | Population |
|------|--|
| 1921 | 14 019 |
| 1931 | 15 727 |
| 1948 | 16 113 |
| 1953 | 15 340 |
| 1961 | 14 384 |
| 1971 | 15 257 |
| 1981 | 16 713 |
| 1991 | 17 726 |
| 2002 | 17505, (16637 Macedonians, 651 Roms, 217 Others) |

1 See Hugh Poulton, “The Balkans. States and Minorities in Conflict”, London, 1993, p. 92

2. Economic development

Until 1945 there was no industry developed in Delchevo. The population mainly survived doing agricultural work, the small *charshija* (Ottoman style market) full of craftsmen servicing the needs of the agricultural workers, a couple of restaurants and shops. Since the terrain is mountainous many engaged in cattle breeding. After the Second World War, Delchevo was not much different then during Ottoman times. While most worked the soil on their own the communist's undertook collectivization of the land of individual farmers founding larger Agricultural Cooperatives in a number of villages near the town. In early 1950's there was no industry one can speak of. At the time of the first census taking in socialist Macedonia there were officially 50 persons employed in the industrial sector.² The sleepy town in the mid 1950's was radically woken up when electricity was provided. Industry and mining grew immediately as the communist leadership sought to modernize Delchevo. In the early stages of industrialization its share of the economy was significantly lower than that of agriculture, being 23% in 1961, it grew to 63% by 1980. By the early 1970's the main economic sectors became the production of clothing, the tobacco industry, as well as mining.

Delchevo Economy (Sectors according to GDP share in %)³

| Economic Sector | 1961 | 1966 | 1971 | 1976 | 1980 | Midd 80's |
|----------------------|------|------|------|------|------|-----------|
| Industry and Mining | 23 | 38 | 49 | 56 | 63 | 63 |
| Agriculture | 51 | 36 | 24 | 17 | 14 | 5 |
| Construction | 5 | 6 | 12 | 9 | 8 | 12 |
| Trade | 10 | 13 | 10 | 11 | 8 | 10 |
| Services and tourism | 2 | 1 | 0,5 | 0,6 | 1 | 0 |
| Other sectors | 9 | 6 | 4.5 | 6 | 6 | 10 |

In the mid 1980's there were about 3700 persons employed in the industrial sector in Delchevo. Industrial production dominated the economy. Most employed persons worked in the industrial sector. The total employment in the municipality stood at 5900.⁴ The clothing production became the leading activity employing the biggest number of workers in the municipality. More than half of the industrial employees of Delchevo worked in the textile and clothing factories, a big part also employed in the mine in the nearby Makedonska Kamenica. Thus out of 3700 industrial jobs, 2100 were in the clothing and leather productions, while 1500 were in the mining industry.⁵ The municipality grew and lived of these two sectors.

² See Ksente Bogoev, Malesh i Pijanec VIII, MANU: Skopje, 1985, page 34.

³ Source: Ksente Bogoev, Malesh i Pijanec VIII, MANU: Skopje, 1985, pages, 34, 173, Dragan Arsovski, Dimitar Hristovski, Delchevo, 1985, page 137, Study of Local Economic Development of Delchevo Municipality, ATPEB: Skopje, 2001, p.67.

⁴ See Dragan Arsovski, Dimitar Hristovski, Delchevo, 1985, page 137, Ksente Bogoev, Malesh i Pijanec VIII, MANU: Skopje, 1985, p.34.

⁵ Arsovski, p.137, Bogoev, p.108.

Employment in Delchevo's Industrial Production by Sectors ⁶

| Employed by sectors in % | 1971 | 1976 | 1980 | Mid 80's |
|--|------|------|------|----------|
| Mining, production of metals and similar | 55 | 50 | 40 | 40 |
| Textile and leather industry | 38 | 42 | 55 | 57 |
| Tobacco production and processing | 6 | 6 | 4 | 3 |
| Other sectors | 1 | 2 | 1 | 0 |

⁶ Source: Ksente Bogoev, Malesh i Pijanec VIII, MANU: Skopje, 1985, page, 175.

2.1 The Leading Industry - Textiles (Clothing and Leather)

The clothing production began developing in Delchevo since the end of the 1950's. In 1959 the *Kilimara/Goblenka*, the factory for production of woollen duvet, quilt cover, and hand made carpets was founded. Its beginnings were more than modest, with ten employees and five spinning mills (*razboj*). Already in 1963 the factory employed 60 and constructed its own building. In 1970 *Kilimara* expands its production in the villages of Razlovci and Gabrovo.⁷ The following year new machines were bought. Mechanical spinning replaced the old fashioned hand production. In 1973 the factory changed the name into *Goblenka*. A new unit with 12 employees was added in 1975 in a nearby village. A big improvement was made in 1979 when a factory for hand making of carpets was open in the nearby Makedonska Kamenica with 157 workers.⁸ By the early 1980's *Goblenka* grew to become the biggest factory for hand made carpets in socialist Yugoslavia. In 1986 it employed about 600 people, 95% of which women.⁹ The main products of the factory were various kinds of carpets, duvets, wollen duvets, and blankets.

Goblenka was not an isolated case as other clothing-producing factories were established in Delchevo. Thus, in 1960 the manufacturing unit *19 Oktomvri* was founded later changing the name to *Partizanka*. It started modestly with only seven employees. While in the first period it was part of the textile producing company *Makedonka* from Shtip it began autonomous production in 1966.¹⁰ Already in 1972 the factory had 270 workers, sewing shirts, jackets and overcoats.¹¹ In 1976 the factory moved to a newer, bigger building expanding production. By 1984 *Partizanka* employed 570 persons, out of which 90% women, adding to production items such as children shirts, women's blouses, and pajamas.¹² That year the factory produced two million pieces of clothes.

Yet *Partizanka* and *Goblenka* were not yet the best or biggest Delchevo could offer in the clothing sector. The biggest clothing producing factory *Frotirka* was founded in 1962. This factory was unique as it made huckaback based products, such as towels, linens. At first this factory also worked within the system of *Makedonka* factories. In 1968 *Frotirka* employed 240 workers and separates from *Makedonka*.¹³ Yet, two years later the factory integrates its activities with *Inteks*.¹⁴ In 1972 the number of workers increased

7 See Stopanski Vesnik, 3rd March, 1971, page 4.

8 See Stopanski Vesnik, "Se ochekuvaat podobri rezultati [Better Results Expected]", page 12, 15th March, 1986.

9 See Stopanski Vesnik, "Golem interes za novite proizvodi [Great interest for new products]" page 114, 14th April 1986.

10 On Makedonka and the clothing industry in Shtip see the policy study of CRPM Macedonian Clothes for Europe, Skopje February 2006, freely available at

<http://www.crpm.org.mk/Papers/MACEDONIAN%20CLOTHES%20FOR%20EUROPE.pdf>.

On the development of the national textile industry see CRPM's The history of the Macedonian textile industry with a focus on Shtip; Occasional Paper N. 8; November 2005, available at

<http://www.seep.ceu.hu/daskalovski/OCCASIONAL%20PAPER%20N.%208.htm>.

11 See Stopanski Vesnik, "Pozitivni Rezultati [Positive Results]" 9th February, 1972, page 4.

12 See Dragan Arsovski, Dimitar Hristovski, Delchevo, 1985, page 91-92.

13 See Stopanski Vesnik, 4th June, 1969, page 4.

14 Dealing with export of finished products and import of raw materials and fabrics, *Inteks* was a trade representative of a large conglomerate of 25 factories/producers from socialist Macedonia. The government urged the smaller apparel producers to join *Inteks*. In the 1985 *Inteks* had 58 percent of the total turnover and 47 percent of the profits of the textile and apparel producers in the socialist Macedonia, and made exports worth 22.8 million USD in the Western markets and 30.7 in the socialist block.

to 370.¹⁵ At this time *Frotirka* introduced four shifts of work employing 10% of the workers in the municipality.¹⁶ By 1987 the total number of employees reached 623, the factory exporting its production to American, European, Asian and even African markets.

The clothing factories dominated the economy in Delchevo in socialist Macedonia. If one considers the strength of the local leather producers the impact of this sector can be seen in full light. There were two factories producing leather products in Delchevo before 1989, *Metodi Mitevski-Brico* and *Krzno*. *Brico* was founded in 1962 focusing on the production of various kinds of leather coats, vests, fur coats, fire fighting equipment and protective clothing for hunting and forest firefighters. By the mid- 1980s it grew to employ about 220 workers. The manufacturing unit *Krzno* was established in the village of Bigla in 1982 in the building of the old school with 23 employees. Later on an administrative unit was opened in Delchevo. Part of the production was also transferred in a building in Delchevo. *Krzno* produced leather gloves and fire fighting equipment, employing 85 persons by the mid 1980s.¹⁷ In 1984 both *Krzno* and *Brico* integrated production with the Skopje based leather producer *Goce Delchev (Godel)*.

Clothing and Leather Producing industry in Delchevo Before the Transformation

| Number of Employed | 1970s | Mid 80's |
|----------------------------------|-------------------------------------|------------|
| Goblenka | 157 | 600 |
| Partizanka | 270 | 570 |
| Frotirka | 370 | 623 |
| Metodi Mitevski Brico | 60 | 220 |
| Krzno | Not existent at that time | 85 |
| Total number | 860 (43% of all industrial workers) | 2098 (57%) |
| Industry total number of workers | 1999 | 3676 |

¹⁵ See Stopanski Vesnik, "Frotirka Voveduva Chetvrtta Smena[Frotirka introduces a Forth Shift]," 26th January, 1972, page 4.

¹⁶ See Stopanski Vesnik, "Megju Dobavuvachite i Potroshuvachite" 14th May 1972, page 26.

¹⁷ See Dragan Arsovski, Dimitar Hristovski, Delchevo, 1985, pages, 95-96

2.2 Other Industries

An important part of the economy of Delchevo region was the mine *Sasa*. In 1961 the building of the *Sasa* zinc and lead mine at the Osogovo Mountain began. Until 1967 *Sasa* was administered by the nearby mine of *Zletovo* and did not make profits. Since then *Sasa* grew continuously, investing in a number of projects in the region, building a whole miners neighborhood in Makedonska Kamenica.¹⁸ *Sasa* even financially helped the clothing manufacturing producer *Astibo* construct a producing unit in Makedonska Kamenica as well as the founding of *Goblenka*. In 1971 *Sasa* had 1000 employees and earned 40% of the municipal income.¹⁹ By 1984 the mine had 1484 employees producing 540.000 tons of zinc and lead. Within the *Sasa* complex there was a factory for manufacturing zinc related products with 54 employees half of its production being exported.

Another important economic force in the municipality during socialist times was the local unit of the Skopje based construction firm *Granit*. Founded as *Obnova* in 1948 with only a handful employees it became part of *Granit* in 1970 and grew steadily having about 730 workers in 1984. In socialist Macedonia, Delchevo had a few other firms worth mentioning. *Tehnozavod* started as a trading company turning to production of various firefighting equipment. The last important industrial producer to mention was *Jugovitropan*, a factory producing air cleaning filters. Mostly exporting its products the company employed 80 persons in 1984.²⁰

18 Ibid, p.87

19 Ibid, p.92.

20 Ibid, pp. 107-108

2.3 Left on the Margins: Agriculture

Although agriculture was throughout the history the main economic activity of Delchevo it did not produce much value added. On the one hand, the land is not very fertile; on the other hand, the cultivation methods used were outdated. The establishment of agricultural cooperatives in socialist times did not bring significant results. The biggest cooperative was ZIK Sandanski, founded in 1948, quickly became the biggest supplier of food for Delchevo. It operated different animal farms; with pigs, turkeys, cows and sheep. The cooperative also grew apples and sour cherries. By mid-1980's Sandanski had 445 employees. In 1955 the Delchevo tobacco processing company was founded. First called Monopol later becoming part of the Macedonian-wide Jugotutun the company processed between 700 to 1000 tons per year.

2.4 Services for Citizens

The service sector in Delchevo grew after the World War Two. Many new firms were founded catering to the needs of the local citizens. Among the biggest were JP Polet, a bus transportation company founded in 1960 with 8 employees and 13 vehicles, growing to 290 employees servicing 20 buses, 106 trucks, and 60 other transportation vehicles in 1984.²¹ The public utility company Bregalnica provides services for Delchevo with 120 workers in 1984. Catering and restaurant services were provided by the public company Ilinden, with 118 employees. It managed a motel in the village of Lukovica. A Center for recreation and holidays at the mountain Golak also offered recreational services for Delchevo residents. Founded in 1981 it is located 10 km from the town at a height of 1300 meters, just under the Chavka peak (1358 m). It has 5 apartments, 8 hotel rooms a restaurant with 170 seats and fields for mini football, basketball and volleyball.

21 See Dragan Arsovski, Dimitar Hristovski, Delchevo, 1985, pp.112-114.

3. The Transformation of the Socialist Economy and the Present State of Affairs

During socialist times the main economic activity in the municipality of Delchevo was based on the clothing and mining industry. The transformation of the economy since independence and the political administrative adjustment on the local government level brought changes to Delchevo. Since 1976 Delchevo was one of the 34 municipalities of socialist Macedonia. The territorial redrawing of boundaries of the local government units in 1996 and 2004 however gave Makedonska Kamenica municipal status reducing the territory of Delchevo by a third. As the main mine is located in Makedonska Kamenica, the economy in the new municipality of Delchevo lost the share of the mining industry.

Besides administratively losing the mining industry the economy in Delchevo since 1989 suffered other shocks. Many socialist era companies, including the main clothing producers, such as Goblenka and Frotirka, went bankrupt or were liquidated.²² The biggest agricultural producer ZIK Sandanski shared the same faith. Although in 2007 there were indications that a new milk processing plant would be opened in Delchevo the circumstances in the agricultural sector are destitute and can hardly change much to the better.²³ Other former socialist giants have also been closed including the main hotel Makedonija. As a result, the municipality suffers. The unemployment has risen. A new trend of emigration of young people has occurred. The birth rate has plummeted. If 200 babies were born in Delchevo in 2002, the number dropped to 151 in 2003, 138 in 2005, moderately recovering to 167 in 2006. Schools and kindergartens have few pupils to take care of. The number of families that receive welfare contributions has continuously grown.

In fact, according to estimates by the *Deutsche Gesellschaft für Technische Zusammenarbeit (GTZ)* the Eastern region of the country, one of the eight administrative units of the country according to the EU based NUTS classification, has continuously witnessed low investments and especially during the economic transformation since 1989.²⁴ It does not help the economy of Delchevo that due to poor financial management since independence the local municipality has become heavily indebted.²⁵ The municipal debt seriously undermines the capacities of the local government to aid the Delchevo economy.

22 See Utrinski Vesnik, "Mnogu Stopanski Kapaciteti vo Delchevo se pod Kluch poradi Vmeshuvanje na Politikata [Many Firms Closed Due to Political Reasons]", 19th August 2005, <http://217.16.70.245/?pBroj=1857&stID=41593&pR=2>

23 See Dnevnik, "Holandsko sirenje od Delchevo vo EU", 17th October 2007, <http://www.dnevnik.com.mk/?itemID=F3A376341D60BC4CAAC9293C5091E4A4&arc=1>

24 See Utrinski Vesnik "Pechalbarska Treska vo Istochna Makedonija", 9th March 2006, <http://217.16.70.245/?pBroj=2025&stID=63938&pR=3>

25 See Utrinski Vesnik, "Dolgovite Odnosna Nekolku Godishni Budzheti [Accrued debts that are higher than yearly municipal budgets]" 25th April, 2005.

Yet not all is bleak in Delchevo. Few socialist companies such as *Frotirka*, *Krznno*, *Metodi Mitevski Brico*, the construction company *Granit*, have endured the transition to capitalism being privatized.²⁶ A number of private clothing producers like *Lukateks*, *Jamboteks*, *Snajd*, *Viteks*, *Kimako* and *Kondor* have been opened. Foreign capital has come. In 2006 Vancho Conev invited his Polish partner from *Arlen* to invest in clothing producing. The Polish businessman invested 1.2 million euros employing 120 persons in Delchevo.²⁷ Similarly for 4.8 million euros the Swiss *Tirosa* bought 55% of *Orka Holding* which had clothing factories in Delchevo, Demir Hisar and Kriva Palanka.²⁸ The factory has 250 employees.

26 See Utrinski Vesnik, "Mnogu Stopanski Kapaciteti vo Delchevo se pod Kluch poradi Vmeshuvanje na Politikata [Many Firms Closed Due to Political Reasons]", 19th August 2005, <http://217.16.70.245/?pBroj=1857&stID=41593&pR=2>

27 <http://217.16.70.245/?pBroj=2043&stID=65464&pR=6>

28 <http://217.16.70.236/?pBroj=2293&stID=24746>

3.1 The Employed Few

In recent years the numbers of employed persons in Delchevo have fluctuated from 4033 in 1999, 5304 in 2002, to around 5000 in 2004, and 4930 in 2007.²⁹ Since according to the Employment Agency in Delchevo there are 12540 persons aged 15-64, the employment rate in Delchevo in 2007 is 39%.³⁰ The percentage of Macedonians of working age who are employed is 33,51%, compared to 46% in Turkey, 51,7% in Poland or 65% in Germany.³¹ Thus, although better than the Macedonian average the Delchevo employment rate lags much behind the EU averages.

The ten biggest companies in Delchevo according to number of employees

| Name of Firm | Number of employees | Type of work |
|--|---------------------|--------------|
| A.D PALTEKS | 614 | Clothing |
| FROTIRKA-KOMPANI | 335 | Clothing |
| ZDRAVSTVEN DOM "GOCE DELCHEV | 141 | Public |
| ARLEN | 120 | Clothing |
| DAMJANOV - S DOOEL DRUSHTVO ZA PROIVODSTVO TRGOVIJA I USLUGI | 119 | Clothing |
| TEKSTIL-M D.O.O | 92 | Clothing |
| PTP "LUKA-TEKS" | 84 | Clothing |
| OU KIRIL I METODIJ | 81 | Public |
| OPSHTINSKO SREDNO UCHILISTE M.M-BRICO | 80 | Public |
| OU VANCHI PRKE | 77 | Public |

After the transition, the share of the clothing sector in Delchevo's economy remained large. The share of the other manufacturing industries has also remained strong. Considering that the administrative redistricting has taken away the mining industry from the municipality of Delchevo, industrial production has kept its significance as a large employer in the local economy. On the other hand, the size of the agricultural and construction sectors decreased considerably. Trade and services have grown to become the second biggest employing sector in Delchevo municipality.

29 See Study of Local Economic Development of Delchevo Municipality, ATPEB: Skopje, 2001, p.68, "Vo Delchevo Ubavo Zhiveat Samo Penzionerite [Only Pensioners live nice in Delchevo]" 13th March 2004, <http://www.vest.com.mk/default.asp?id=74959&idg=4&idb=1108&rubrika=Revija>, State Statistical Office, 2001 Census Results, data from The National Pension Insurance Fund [PIOM] for 2007.

30 The employment rate represents employed persons aged 15-64 as a percentage of the same age population. Persons in employment are those who did any work for pay or profit for at least one hour during the reference week of the survey, or who were not working but had jobs from which they were temporarily absent. Family workers are included.

31 See official EU and OECD figures at: http://www.oecd.org/document/39/0,2340,en_33873108_33873854_33812967_1_1_1_1,00.html and <http://europa.eu.int/rapid/pressReleasesAction.do?reference=STAT/05/112&format=HTML&aged=0&language=EN&guiLanguage=en>

The biggest employers by sectors in 2007³²

| Sector | Number of employees | Share in the economy |
|--|---------------------|----------------------|
| Clothing Production | 1600 | 33% |
| Trade and Services | 1500 | 31% |
| Public Institutions (Schools, Courts, Health Care Providers Etc) | 700 | 14% |
| Other manufacturing | 700 | 14% |
| Agriculture | 330 | 7% |
| Construction | 100 | 2% |
| Total | 4930 | 100% |

³² Data from PIOM, Agency for Employment, regional branch in Delchevo.

3.2 Unemployed but not Skilled

The number of unemployed in Delchevo has lingered between 2154 in 2002, 5003 in 2006, and 4127 in July 2007. It is difficult to estimate what are the reasons for the large differences in numbers. However, it is clear that judging from the educational profile of the municipality that many of the unemployed would not be able to easily find a job even if the local economy was booming. Delchevo, alike the rest of the country, does not have a very educated population.

Educational Profile of the municipality of Delchevo, aged 15 and above in %³³

| No education | Unfinished primary school | Primary school | High School | Vocational School |
|--------------|---------------------------|----------------|-------------|-------------------|
| 4.1 | 15.5 | 33.5 | 38.1 | 3.4 |

| University Degree | Other | Masters Studies | PhD |
|-------------------|-------|-----------------|-----|
| 5.2 | / | / | / |

Delchevo Population 15 and over according to the educational attainment (14421)

| Type of education earned | Number of people |
|--------------------------------------|------------------|
| University Degree | 746 |
| Vocational School | 490 |
| High School | 5499 |
| Primary School | 4836 |
| Not completed primary school studies | 2237 |
| No formal education | 594 |
| Other | 19 |

One can see that most of the educated citizens of Delchevo have acquired high school diplomas (38%). However if we count all those who have only finished primary school together with the citizens which have not even completed the elementary education or have no formal education then this category of Delchevo inhabitants becomes bigger than the one with high school diplomas. Altogether there are 53% of Delchevo citizens that have primary education or less. In fact, very few of the inhabitants of Delchevo have a university degree or have completed postgraduate studies. Even if the problem of underdevelopment and unemployment was by a miracle solved through opening new companies these would have to be jobs that do not require great deal of sophistication and skills. Delchevo, simply put, has no work force that can do more than low skilled manufacturing jobs such as those in the clothing sector.

³³ <http://www.stat.gov.mk/glavna.asp?br=35> Obrazovanje, kultura i građanski život., str 227.

3.3 Clothing Manufacturing as a Dead End Street

Can a city whose economy depends on textiles and clothes be anything other than poor? Can a region where the typical worker is a woman with primary school education, sewing and stitching pieces of imported cloth with the help of old-fashioned sewing machines, truly develop? In the short term, then, the sector appears to be doing fine. However, in the clothes sector the short term is short indeed. It is alarming that today, as in the socialist past the simple “sewing and stitching” remains the main economic activity in the town. Investments in higher value-added production are hardly evident, which brings the danger of Delchevo being destined for further stagnation. As the experience of so many countries has shown manufacturers and retailers scout the planet for the lowest-cost production. The search for yet lower costs of production influences the “race to the bottom” concept.

In clothing production, labor expenses account for up to 60 percent of the overall production costs.³⁴ Labor costs are particularly important in the outward processing trade (OPT) also known as cut-make production, the 807/9802 program, “production sharing”, or *lohnveredelung*. In this system of international subcontracting firms supply intermediate inputs (cut fabric, thread, buttons and other trim) to suppliers, typically located in neighboring low-cost countries with reciprocal trade agreements that allow goods assembled offshore to be re-imported with a tariff charged only on the value added by foreign labor. To make this system worthwhile, the cost savings associated with low-wage assembly must exceed the inherent additional costs of production fragmentation, namely: two-way shipments; longer and larger inventory; and added co-ordination to manage the fragmented supply chain. Even small deviations in production costs can in turn drive the producer “out of the market” the buyer turning to the competitors.

Since orders can be placed anywhere on the planet the sub-contractors, the ones actually who produce the goods, are relatively powerless price-takers, rather than partners and deal-makers. The world of textile and apparel industry has undergone several production migrations since the 1950s, from North America and Western Europe to Japan in the 1950s and early 1960s, and then from Japan to Hong Kong, Taiwan and South Korea, which dominated *Global* textile and clothing exports in the 1970s and early 1980s. Finally in the late 1980s and the 1990s there was a third migration to other developing economies including China. Each new tier of entrants in the *Global* apparel trade had a significantly lower wage rate than its predecessor. Delchevo and our country have entered this race sometimes ago. But, an economy whose symbol is the cotton T-shirt is not one that can reach EU living standards in the 21st century.³⁵

How can textile companies move up the value added chain? What is most profitable today? In clothing manufacturing, the biggest profits are made from combinations

34 The Global Apparel Value Chain: What Prospects for Upgrading by Developing Countries by Gary Gereffi and Olga Memedovic, UNDP Vienna, 2003, p.22. The clothing value chain is organized around five main parts: raw material supply, including: natural and synthetic fibers; provision of components, such as the yarns and fabrics manufactured by textile companies; production networks made up of garment factories, including their domestic and overseas subcontractors; export channels established by trade intermediaries; and marketing networks at the retail level.

35 See for example, Pietra Rivoli, *The Travels of a T-shirt in the Global Economy*, John Wiley & Sons: New York, 2005.

of skill-intensive activities, such high-value research, design, sample making, sales, marketing and financial services. Improvements in quality control, packing, warehousing and transport also earn large profits within the clothing industry. As profitability is greatest in these parts of the global value chain it is natural that there are high entry barriers for new firms. In fact, leading clothing retailers and manufacturers spend lavish advertising budgets and promotional campaigns to create and sustain global brands. They use sophisticated and costly information technology to lower costs and to have a “quick response” to fashion whims of the public. In the world trade of apparel, leading retailers, designers and marketers link overseas factories with product niches in their main consumer markets. Suppliers often need to undertake frequent shipments to replenish stocks in retailer's stores. Working under tight schedules it is extremely difficult for local suppliers to acquire the skills and move from contract manufacturing to a full-package supply and then to develop new production and marketing niches.

Upgrading within production requires countries and suppliers to co-contract with buyers, to provide both the raw materials (i.e. textile cloth) and finished garments achieving a ‘full-package’ of services - from textile production to cutting, sewing, and packaging. Full package production thus means that an EU retailer can go to a Macedonian manufacturer and say ‘we want so many thousand jackets; we will send the designs to you down the line’. The Macedonian firm then gets the raw material, designs the jackets according to the EU retailer's master plan, makes them, packs them and sends them directly back to the EU.

Thus there will be a new premium on *skilled labor*, as companies have to extend their range of skills from just sewing and stitching. Compared with the mere assembly of imported inputs, full-package production fundamentally changes the relationship between buyer and supplier in a direction that gives far greater autonomy and learning potential for industrial upgrading to the supplying firm.

However, a move to a full package of services is very difficult to achieve. It does not only require improvement of production and design efficiency but also financing, and expertise in marketing, material sourcing, quality control, logistics (storage and retail distribution). For example, efficiency in the marketing of products increasingly becomes extremely important factor of comparative advantage. Waiting for customers to come is no longer sufficient to increase exports. Marketing strategies have to be developed and applied. Another factor in the consideration of comparative advantage is the design and quality of products. Permanent upgrading is essential for achieving, maintaining and improving competitiveness.

Delivering a full package of services is however still a far step from producing own brands and etiquettes. Improving through a *functional* upgrading means moving into higher valued-added stages such as design, branding, marketing and retailing and is more difficult to achieve. Only when local firms are capable of making retailer's or branded buyer's designs into finished products on time, with volume and quality that fulfill their standards they develop a potential to cut their buyers and establish own brand names. This strategic move requires services-related *expertise in designing, marketing, retailing, financing* and the *gathering of market intelligence* on foreign markets. The strategy has been tested in Turkey, Hong Kong, and China where some leading manufacturers like *Mavi Jeans* have

launched their own brand names and are entering retail distribution. Within this segment of the clothing industry the biggest profits are being made but upgrading is quite costly.

At the moment the vast majority of Delchevo and Macedonian companies are engaged in the assembly phase of the production of clothes through outward processing agreements/programs. This is a low value added activity which is very vulnerable to market fluctuations. The improvements in this sector of Delchevo's economy are difficult to make. An upgrade of the clothing production is related to the available human resources which is contingent upon the existence of adequate and good quality educational institution. The upgrade is also dependent on access to cheap capital and latest technology. At the moment it is difficult to imagine the clothing sector in Delchevo moving on to higher value added activities. It is even more difficult to imagine that this dominant sector within the local economy will be able to generate growth and new opportunities for the municipality of Delchevo. Perhaps the town has to turn to something new in order to successfully develop in the future. One alternative is to focus on developing the tourist sector.

4. Developing Tourism in Delchevo

A Survey of Tourists

For the purposes of the “Discovering the Hidden Opportunities” project, CRPM conducted a mini-survey on Delcevo’s potential in tourism. The survey consisted of 24 questions and covered a specific group of people, conditionally labeled here as tourists.

Tourists, for the purposes of this survey, are people who live elsewhere, come to Delcevo for various reasons and stay in Delcevo for less than three months. Therefore, the term “tourists” as used in the survey should be taken with several caveats. Namely, the place of living (out of Delcevo municipality) and the short period of stay in Delcevo (less than three months) are decisive in defining the term “tourists” for the purposes of CRPM’s survey. No attention whatsoever is paid to the main reason why those people come to Delcevo. This is so, because whatever the main reason for visit, each of them may also appear in at least a secondary role of a tourist, by the very fact doing other things on the margins of their visit, such as visiting friends, festivals, cultural events, historical sites, churches, sport games, doing shopping, sightseeing, going to bars/restaurants/night clubs, etc.

The survey spanned from April to August 2007 and covered 35 respondents (tourists). 54,3% of them are males, 45,7% - females. Most of them are of age between 26 and 35. (37,1%). 77,1% of the respondents have higher education. Most of them are either employed or students. (37,1% and 34,3% respectively)

Main findings ³⁶

1. Most tourists stay in Delcevo up to three days. (57,1 %)
2. Most tourists come to Delcevo by their own vehicle. (48,6 %)
3. Most tourists come to Delcevo in a group of five or more. (31,4 %)
4. Most tourists are of age between 20 and 34. (20-24 years of age - 28,6 % and 25-34 years of age - 28,6 %)
5. Most tourists are repeated visitors. 48,6 % of them have visited Delcevo in the last 12 months. 37,1 % of tourists are in Delcevo for the first time.
6. Most visitors come to Delcevo for the purposes of business meetings or conferences. (37,1% and 28,6% respectively). A considerable chunk of respondents (about 10%) say they come to Delcevo to do short-term volunteering.
7. Most tourists use their own vehicles or taxi, while in Delcevo. (42,9% and 25,7%)
8. Most visitors, beside their main purpose of visit, are also eager to visit friends or go to bars/night clubs. (28,6% and 20% respectively)
9. Local transport is assessed as very good. (from 1 to 5, latter being the highest; 28,6% of tourists give grade 4)
10. Accommodation is assessed as good. (20% give grade 3)
11. Hospitality of locals is assessed with the highest grade 5. (51,4%)
12. Tourist attractions are assessed between good and very good. (22,9% give grade 3 and 22,9% give grade 4)
13. Entertainment is assessed as good. (22,9% give grade 3)
14. Tourists are reluctant to talk about their spending in Delcevo. 74,3% refuse to answer that question. The rest say that their spending ranges from 500 mkd up to 10000 mkd, (1 EU = 61,5 mkd), the average being 2200 mkd per person.
15. Most of visitors' money goes for food and beverages. (14,3%) However, 71, 4% of tourists do not answer this question.
16. Most of tourists are going to visit Delcevo again in less than a year. (57,1%)
17. Most tourists say Delcevo met their expectations only to some extent. (57,1%)
18. Most tourists think that organized excursions are the most important ingredient that lacks in the local tourism offer. (25,7%)
19. Most tourists refuse to reveal the sum of their income. (62,9%) 17,1% of them say that their salary ranges from 150 to 300 euro.
20. 74,3% of tourists are Macedonians. Most of them come from Berovo (25,7%), Skopje (22,9%) and Pehcevo (17,1%)

³⁶ For more details, please see Chart 1 – Survey. For questionnaire's structure please see Appendix – Questionnaire.

4.1 What are the capacities of the Delchevo Tourist Industry?

Developing a Tourist Inventory

The CRPM team undertook a thorough investigation of the tourist potentials of the municipality of Delchevo. Using a specialized methodology the CRPM team visited and appropriately graded the various tourist specific items such as the existence and state of the affairs of the accommodation capacities, art galleries, ski lifts, city parks, restaurants and so on. In a summary fashion the most important findings for each category are presented in the following table.

Chart 1- Delchevo Tourist Inventory

| Item | Description | Assessment |
|---|--|------------|
| 1. Accommodation | There are several accommodation facilities in Delcevo: a hotel, two pensions, three lodges and a rest camp. Some of them are inoperative. The other ones are of fair to good (acceptable/modest) quality in the overall standard of furnishings, service and guest care. Clean, comfortable and functional accommodation. ³⁹ | - |
| 2. Accuracy of locally obtained information | The locals are quite amiable and willing to assist anybody and provide the needed information. Usually, they do not give misleading directions. | + + |
| 3. Alternative therapies | There is no Reiki, Shiatsu, Reflexology, Meditation Aroma therapies or Yoga. There are a few people believed to be in a possession of healing powers. However, they are not interested in going public. | - - |
| 4. Archeological findings | Ritual burial carriage dating 4th to 6th century A.D., prehistoric animal fossils. | + + |
| 5. Art galleries | Not available | - - |
| 6. Baby-chairs, baby-changing rooms | Not available | - - |
| 7. Babysitting | There are about fifty (50) young people that have worked as au pair abroad, so they have experience in baby-sitting. Some of them have completed trainings. | + |
| 8. Botanical gardens | Not available | - - |
| 9. Bus station/lines | The sole bus company in town operates a regular bus line only to Skopje, once a day. There are also lines to Zagreb and the Bulgarian coast over the summer, but these are not regular. The city has no bus station. There is no sales office either, so the tickets are purchased on board. There is no proper public transport, but minivans and taxi are at disposal to provide transport services. | - - |
| 10. Cable-cars, ski-lifts | Not available | - - |
| 11. Children's clubs | There are several active children's clubs in the town, such as the traditional folk dancing club, ballet, painting colony, literary circle etc. | 0 |
| 12. Children's menu | Not available | - |
| 13. City lighting | For the most part, the city of Delcevo has ample and balanced city lighting. The main downside is the lighting of the river bank. The nearby tourist attractions, however, are not illuminated at all. | 0 |

38 For details please see Appendix, Tourism Accommodation Grading Criteria (Evaluation of Accommodation.)

| | | |
|-------------------------------------|--|-----|
| 14. City park | The city park is located quite central, between the river and the House of Culture. It has a large open-air stage, convenient for various performances. There can be noticed attempts at cultivating the area. However, the maintenance is not at its heights, as broken glass and open gutters are scattered all around, endangering the safety of visitors. | - |
| 15. Cleanness, ecological awareness | Delcevo is at any rate cleaner than Skopje and most of the towns in the country. Still, in terms of ecological standards and awareness, the situation is far from being satisfactory. The town and its surroundings are dotted with small dumps, which makes the scenery unpleasant. The situation is rather acute at Golak mountain. The central area is equipped with various garbage bins (mostly made of concrete), but the waste collection system relies predominantly on big containers. | 0 |
| 16. Driveway to tourist sites | The driveway to tourist sites is in poor condition, with many uneven surfaces or some large potholes/puddles. It is still drivable but not by all types of vehicles. ⁴⁰ | - |
| 17. Eating out / restaurants | There are fourteen (14) restaurants in Delcevo that feature fair to good (acceptable/modest) quality in the overall standard of restaurant products, facilities and service. | + |
| 18. Extreme sports | Not available | - - |
| 19. Farmers' market | The market has approximately fifty (50) counters. It has a convenient location, but no fence or security. Its maintenance is low. Nine-tenths of the goods is brought in from elsewhere. The market day is Saturday. | 0 |
| 20. Festivals, concerts | January 14th - Local Carnival - Surova Easter - exhibition of eggs August 2nd - village of Zvegor August 8-9th - St. Panteleimon - Folklore festival - Golachki folklorni sredbi September 6-8th - Traditional wedding ceremony - Pijanechko-Maleshevska Svadba, featuring a child music festival August 2nd, May 1st, Delcevo's liberation day, birth of Goce Delcev anniversary - music performances Spring - Pijanechki biseri - teenage festival Delcevo Dance - regional children's dance festival Occasionally - Macedonian pop stars' concerts Gocevi denovi - philharmonic music, choir There used to be some rock happenings, but not any longer; Delcevo hosts no rock festivals or techno parties these days. | + |

³⁹ For details please see Appendix, Restaurant Criteria and Expectations (Evaluation of Restaurants). Restaurant products, facilities and service are evaluated against 130 criteria divided in 5 sets.

| | | |
|--|---|-----|
| 21. Folk costumes and dances | The local folk costumes are quite idiosyncratic. However, they cannot be seen in genuine every-day situations, since the locals do not wear them any longer. They can be seen only in the office of the local dancing society "Goce Delcev" or when the latter holds a performance. Replicas can be bought for the price ranging from 200 to 1000 EU. The dancing society "Kopachka" performs the famous Macedonian dance "Kopachka" in a unique fashion. | + |
| 22. Handicrafts | Several local NGOs manage the manufacture of handicrafts. They produce textile, embroidery, knit-works, recycled material souvenirs, bijouterie, felt-wool products (brooches, bags, belts), dried-flower pictures, clocks, icons on glass, marble and wood, woodcarving and pyrography. The handicraft sale is not organized; there is no souvenir shop either. The products can be found during the cultural happenings and religious holidays. | + |
| 23. Healthy or organically produced food | The Pijanec region is famous for its time-honored organic production of prunes. In addition, honey, sour cherry, onion, pear, and wild herbs are products that tend to be produced organically. These foodstuffs cannot be found in retail sale. The restaurants in Delchevo do not offer organically produced meals. However, some products that fall under the heading of "healthy food" can be found in the local supermarkets on special shelves. | 0 |
| 24. Hiking, mount-biking | Certain NGOs organize free hiking to the archeological and religious sites, nearby villages and mountains. There is no organized mount-biking, despite the convenient terrain. | + |
| 25. Horse riding | Not available. There is a stable, but the horses are used for industrial purposes. | - - |
| 26. Indoor children's playgrounds | There is only one indoor playground in Delchevo. It is situated in the shopping centre, on the upper floor. It works with minors aged 3 to 8. The playground has no special entertainment program, but offers various toys and child care at a fair price from 12:00 to 20:00 hrs. | + |
| 27. Informal games and sporting | The city entertains informal tournaments in football and basketball, especially over the summertime. | + |
| 28. Internet-based access to information | General information about Delchevo available on internet. Only one relevant web-portal: www.delchevo.com | + |
| 29. Massages | There is a massage center offering even at-home services | + |
| 30. Medical tourism | There are no private eye-clinics. There are several private dental practices. Most of them are located in the Health House. However, they are not fully equipped as to meet the criteria and demands of the potential foreign patients. The prices are same for foreigners and nationals, and lower than the ones in Bulgaria. Dental surgery and implants are not performed in Delchevo due to lack of equipment. | 0 |
| 31. Mountain lodges | Several lodges either in bad condition or inoperative. | - - |

| | | |
|---|--|-----|
| 32. Museums | Delcevo has no museums. There is one permanent exhibition in the House of Culture, but it has not been upgraded for a long time. All significant archeological findings, such as the Roman-era chaise or the prehistoric animal fossils are kept either in Shtip or in Skopje. | - - |
| 33. Myths and legends | Raven - birthplace the first Slavic alphabet, the cell of St. Cyril, the church of King Constantine and Queen Elena, the dinosaur forest, the fertility of Ilina's rock, the healing powers of St. Panteleimon, the millennium oak of St. George, the petrified grooms of Kukule, the three holy springs. | + + |
| 34. National cuisine | There are several local dishes but they are not offered as such on menu. | - |
| 35. Nature | Scenic and intact nature spreads all around the town of Delcevo, especially towards the old border crossing with Bulgaria at Crna Skala and Golak Mountain. Several caves are also located in the town's vicinity. | + |
| 36. Nightlife | Delcevo has a decent nightlife, featuring several trendy bars and discotheques. | + + |
| 37. Old crafts | Most of the old crafts have vanished. Traditional music instruments are still produced in the village of Zvegor. There are several active woodcarvers in the town. Some of them produce furniture with folklore elements. There is no souvenir shop in the town. An old crafts fair was organized once, but then discontinued. | - |
| 38. Outdoor activities | Delcevo hosts a symbolic bicycle race, marking May 9th - the day of Europe as well as a section of Tour de Balkans race. There are no biking paths. | 0 |
| 39. Outdoor children's playgrounds | The main outdoor playground in the town is conveniently settled between the new church and the sport complex, just alongside the river. It is a 600 m/sq fenced playground, which is unfortunately in a bad condition and practically unusable. Now and then there comes a small fun park, usually located in the center, next to the House of Culture. There are playgrounds in the kindergarten and on the premises of the Center for children with special needs. The latter is not for public use. | - |
| 40. Overcharging | The prices are same for locals and strangers. Overcharging is not a common practice. | + + |
| 41. Public toilets | There is only one public toilet, with a convenient location, right beside the bridge. It is free of charge, but neglected to the point of uselessness. | - - |
| 42. Recreational activities with a social dimension | Cleaning the environment - ecological picnics - the planet earth day / three times a year | + |
| 43. Road signs | The horizontal traffic signage is rather worn-out, obsolete and of little use, whereas the vertical one is next to non-existent. All inscriptions are in Macedonian. There is no signage marking the tourist destinations, with the exception of a perished signpost to the Golak mountain, which is by the way not very helpful. This means that an outsider needs to rely on the assistance of locals in order to move around. Many streets have narrow or no sidewalks at all. There is plenty a room for free-of-charge parking. | - |

| | | |
|---|--|-----|
| 44. Rustic taverns | Not available | - - |
| 45. Safe, hassle-free environment | Although far from being a crime-free environment, Delcevo is a place where tourists can feel pretty safe. This is so because the city is rather bereft of crime that may have a bearing on the tourists in a direct way. The street crime, such as theft and vehicle-related larceny, is quite rare. There are no dangerous ghettos within the area nor are there places to be avoided in the late hours. There are virtually no street beggars as well. The gravest annoyance to public order are occasional punch-ups that may take place at the night time bars and cafes. However, not only do these offences occur very seldom, but also, they have no deeper reason behind them. | + + |
| 46. Safety at sporting events and venues | Sport equipment cannot be leased. There are no instructors available on demand. A pool rescuer watches over the venue during the season. | - |
| 47. Sauna, Jacuzzi | Not available | - - |
| 48. Scouting | Not any longer | - - |
| 49. Shopping malls/centers | There is a two-storey shopping centre in Delcevo's downtown, lodging all basic stores. | + |
| 50. Smoking ban | The ban on smoking is generally obeyed. Each facility has a smokers' corner. However, the distance between the smoking and non-smoking area is inadequately small. | + |
| 51. Souvenir shops | Not available | - - |
| 52. Spa | Geo-thermal water investigations at Gabrovo underway. | - |
| 53. Sport objects | Delcevo features a sports hall with 500 seats, inoperative at the moment. There is also an full-size football stadium with about 2000 seats. In the immediate vicinity of the football stadium, there are two open-air swimming pools. One of them has Olympic dimensions, while the other one is for children. The swimming pools include a bar, changing rooms, a shower and two trained rescuers. There are two tennis playgrounds that are still under construction. All school yards encompass playgrounds and some of them - even athletic track-ways. The nearby villages also have sport playgrounds. All playgrounds are open and free-of-charge. None of them has lighting. The two illuminated multi-purpose playgrounds are located in the town. | + |
| 54. Taxi | Affordable and accessible. Same rates for locals and foreigners. | |
| 55. Tourist bureau | Not available | - - |
| 56. Tourist sites' adaptability to elements | The Memorial Center in the village of Razlovci has a motion picture projection hall. The archeological sites have no wet weather facilities. | - |

| | | |
|---------------------------------|--|-----|
| 57. Traffic culture | Delcevo features a low level of traffic culture. Very seldom do drivers stop at zebra crossing and yield to pedestrians. The right to passing priority is not respected, nor is the speed limit. Some locals drink and drive. The conduct of taxi drivers brings about gridlocks. Some cars are parked inappropriately, encumbering thus the movement of pedestrians and bikers. Unscrupulous persons inflict damage onto road signs. Despite of this, however, the traffic accident rate is not high. To some extent, this is due to the low traffic circulation. The risk of traffic accidents is nevertheless higher over the weekend nights, when the alcohol consumption is slightly on the rise. | - |
| 58. Travel agencies | Not available | - - |
| 59. Wandering dogs | Hounds of wandering dogs can be noticed on the streets of Delcevo. This is undoubtedly an unpleasant sight, and revealing for that matter, but most of all - it is potentially risky a situation. Luckily, no dog-related incidents have been reported so far. Wandering dogs cause traffic stoppages. | - - |
| 60. Water quality | The official physical, chemical and radiological analyses confirm that the tap water in Delcevo is potable. The water is said to be rich in calcium and poor in chloride. The water-supply system is made of asbestos, which may be a problem. However, the biggest problem concerning the water-supply and its quality is the pipeline's obsolescence. | 0 |
| 61. Wheelchair/pushchair access | Delcevo has been declared the most accessible city for wheelchairs and prams, winning the first prize in that category. All public institutions but the house of culture have special paths. Most of the restaurants and some of the cafes can be reached too (since most of them are on the ground floor.) Surprisingly, there is no elevator, escalator or wheelchairs pathway in the two-storey shopping centre. The parking lots have no designated places for disabled. | + + |
| 62. Wildlife | Deer, wild pig, rabbit, partridge, pheasant, dace, river trout | + |

4.2 Visitors to Delchevo

Who would come?

Upon assessing the full capacities of the Delchevo tourist industry developing an inventory of tourist capacities the CPRM team undertook the task of evaluating the potential interest in the municipality of Delchevo by various groups of tourists. In effect we have estimated which groups of tourists (for example individuals that have good financial capabilities but have little time for tourism, adventurers or youth) would appreciate most tourist Delchevo. Differentiating among various tourist groups the CRPM team has identified the tourists that would be most likely to come to Delchevo and for which reasons.

Chart 2 - Customer Groups

| Factor | Families with Preschool Children ⁴¹ | Traditional Families ⁴² | Teenagers | Money Rich Time Poor | Close to Nature | Adventurers | Sheer Indul- gence | Result |
|---|---|---------------------------------------|-----------|-------------------------|-----------------|-------------|-----------------------|--------|
| 1. Accommodation | | | | ☹ | | | ☹ | 2 ☹ |
| 2. Accuracy of locally obtained information | | ☺ | ☺ | ☺ | ☺ | | ☺ | 9 ☺ |
| 3. Alternative therapies | | | | ☹ | | | ☹ | 2 ☹ |
| 4. Art galleries | | | | ☹ | | | ☹ | 2 ☹ |
| 5. Archeological findings | ☺ | ☺ | ☺ | ☺ | ☺ | ☺ | ☺ | 7 ☺ |
| 6. Baby-chairs, baby-changing rooms | ☹ | | | | | | | 1 ☹ |
| 7. Babysitting | ☺ | | | | | | | 1 ☺ |
| 8. Botanical gardens | | | | ☹ | ☹ | | ☹ | 3 ☹ |

40 A holiday with babies and children under 5 can be very stressful and there is an increasing reluctance to go abroad because of safety issues of travel, food and healthcare. Some preschool children also holiday with grandparents - this can be to give the parents or single parent a break and is often out of the peak season. To target this market the customer needs to be reassured that it can be safe, hassle free and there are specific facilities or services for that age group such as cots, baby-chairs, buggies, especially adapted bicycles and properly accredited crèches and babysitting. There will also be an increasing consciousness of healthy eating so imaginative menus and enforcement of no-smoking areas will be important. The availability of free play facilities generally or within paid attractions or other tourist facilities such as pubs and accommodation will be crucial. Imaginative toddlers pools, availability of armbands and special sessions for younger children need to be considered in leisure complexes. Water quality and cleanliness are essential. The availability of high quality baby changing facilities within public toilets, eating out establishments and attractions is also key. Isle of Wright Council, Tourism Development Plan, The 2020 Tourism Vision, Working Smarter towards a Sustainable Future, October 2005, p. 21.

41 Holidays with children aged five to twelve have different challenges from those with younger children and are primarily based around the school holiday periods. The sport objects and mountains will continue to be the major attractions over the school breaks, especially during the summer time. Children are more independent at this age and so the ability for informal games and sports, children's clubs and opportunities for discovery will be important. Parents can also get involved on a more equal basis with the older children in outdoor activities such as cycling, water sports and horse riding. Id. for this group. It could involve simply doing nothing for a few days or it could be doing an activity such as walking or cycling. Pursuits that aid mental well-being such as learning to do something or discovering new things will be popular for this customer group. Alternative therapies such Reiki, Shiatsu, Reflexology, Meditation and Yoga are increasingly fashionable. The Rock Festival in its current format has a strong appeal to this group. Rural areas and heritage and garden attractions are important here together with art galleries, museums and rural crafts. Quality of accommodation, eating out and general environment is crucial. They may prefer to travel without their car if the journey is quick and well organized. Id.

| | | | | | | | | |
|--|----|----|----|----|----|----|----|------|
| 9. Bus station/lines | ☹️ | ☹️ | ☹️ | ☹️ | ☹️ | | | 5 ☹️ |
| 10. Cable-cars, ski-lifts | | ☹️ | ☹️ | ☹️ | | ☹️ | | 4 ☹️ |
| 11. Children's clubs | | ☹️ | ☹️ | | | | | 2 ☹️ |
| 12. Children's menu | ☹️ | ☹️ | | | | | | 2 ☹️ |
| 13. City lighting | | | 😊 | 😊 | | | | 2 😊 |
| 14. City park | ☹️ | ☹️ | ☹️ | ☹️ | | | | 4 ☹️ |
| 15. Cleanness, ecological awareness | ☹️ | ☹️ | ☹️ | ☹️ | ☹️ | | ☹️ | 6 ☹️ |
| 16. Driveway to tourist sites | | | | ☹️ | | | ☹️ | 2 ☹️ |
| 17. Eating out/ restaurants | | | | ☹️ | | | ☹️ | 2 ☹️ |
| 18. Extreme sports | | | | ☹️ | | ☹️ | | 2 ☹️ |
| 19. Farmers' market | | | | | ☹️ | | | 1 ☹️ |
| 20. Festivals, concerts | | | 😊 | 😊 | | | | 2 😊 |
| 21. Folk costumes and dances | | | | 😊 | | | 😊 | 2 😊 |
| 22. Handicrafts | | | | 😊 | | | | 1 😊 |
| 23. Healthy or organically produced food | | | | ☹️ | ☹️ | | | 2 ☹️ |
| 24. Hiking, mount-biking | | 😊 | | 😊 | | 😊 | | 3 😊 |
| 25. Horse riding | | ☹️ | | ☹️ | | ☹️ | | 3 ☹️ |
| 26. Indoor children's playgrounds | 😊 | | | | | | | 1 😊 |

| 27. Informal games and sporting | | 😊 | 😊 | | | | | 2 😊 |
|--|--------------------|----------------------|-------------------------|------------------------------------|-----------------|-------------|------------------|--------|
| 28. Internet-based access to information | | | | 😞 | 😞 | 😞 | 😞 | 4 😞 |
| 29. Massages | | | | 😊 | | | 😊 | 2 😊 |
| Factor | Preschool Families | Traditional Families | Teenagers ⁴³ | Money Rich Time Poor ⁴⁴ | Close to Nature | Adventurers | Sheer Indulgence | Result |
| 30. Dental care | | | | | | | | |
| 31. Mountain lodges | | 😞 | 😞 | 😞 | | | | 3 😞 |
| 32. Museums | | 😞 | | 😞 | 😞 | | 😞 | 4 😞 |
| 33. Myths and legends | 😊 | 😊 | 😊 | 😊 | 😊 | 😊 | 😊 | 7 😊 |
| 34. National cuisine | | | | 😞 | | | 😞 | 2 😞 |
| 35. Nature | | 😊 | 😊 | 😊 | 😊 | 😊 | 😊 | 6 😊 |
| 36. Nightlife | | | 😊 | 😊 | | 😊 | | 3 😊 |
| 37. Old crafts | | | | 😊 | | | | 1 😊 |
| 38. Outdoor activities, walking, cycling | | 😞 | 😞 | 😞 | 😞 | | | 4 😞 |

42 Teenagers are strongly influenced by their peer groups and fashion. They also need to develop their independence and try new activities. Parents may also want their own time safe in the knowledge that their children are being looked after. Outdoor activities and arts are two potential areas that could be seen as 'cool' to teenage children. Outdoor activity centers, music festivals and provision of social facilities for young people within accommodation and attractions may be key. Id., p. 22.

43 This target group is consisted of three subunits: DINKS (Dual Income No Kids), SINKS (Single Income No Kids) and Empty Nesters (children grown up and moved away.) Despite predictions to the contrary ten years ago, there is now an increasing number of people working longer hours. Stress is also the most common cause for taking time off work. Although these people are not tied to the needs of children, they are restricted by their employment. This means they can take breaks whenever they like but they will be in frequent short bursts. They tend to be very loyal once they have found what they want. They also work hard but need to wind down and recharge their batteries. The concept of going to a 'retreat' has considerable power for this group. It could involve simply doing nothing for a few days or it could be doing an activity such as walking or cycling. Pursuits that aid mental well-being such as learning to do something or discovering new things will be popular for this customer group. Alternative therapies such Reiki, Shiatsu, Reflexology, Meditation and Yoga are increasingly fashionable. The Rock Festival in its current format has a strong appeal to this group. Rural areas and heritage and garden attractions are important here together with art galleries, museums and rural crafts. Quality of accommodation, eating out and general environment is crucial. They may prefer to travel without their car if the journey is quick and well organized. Id.

| | | | | | | | | |
|---|---|---|---|---|---|---|---|------------|
| 39. Outdoor play-grounds | ☹ | ☹ | ☹ | | | | | 3 ☹ |
| 40. Overcharging | | | | ☺ | ☺ | | ☺ | 3 ☺ |
| 41. Public toilets | | ☹ | ☹ | ☹ | ☹ | ☹ | ☹ | 6 ☹ |
| 42. Recreational activities with a social dimension | | ☹ | ☹ | | | | | 2 ☹ |
| 43. Road signs | | ☹ | | ☹ | | | ☹ | 3 ☹ |
| 44. Rustic taverns | | ☹ | | ☹ | | | ☹ | 3 ☹ |
| 45. Safe, hassle-free environment | ☺ | ☺ | ☺ | ☺ | ☺ | | ☺ | 6 ☺ |
| 46. Safety at sporting events and venues | | | ☹ | | | ☹ | | 2 ☹ |
| 47. Sauna, Jacuzzi | | | | ☹ | | | ☹ | 2 ☹ |
| 48. Scouting | | | ☹ | | | | | 1 ☹ |
| 49. Shopping malls/centers | | | | ☺ | | | ☹ | 1 ☺ 1 ☹ |
| 50. Smoking ban | ☺ | ☺ | ☺ | | ☺ | | | 4 ☺ |
| 51. Souvenir shops | | ☹ | ☹ | ☹ | ☹ | | ☹ | 5 ☹ |
| 52. Spa | | | | ☹ | | | ☹ | 2 ☹ |
| 53. Sport objects | | ☺ | ☺ | | | | | 2 ☺ |
| 54. Taxi | ☺ | ☺ | ☺ | ☺ | | | ☺ | 6 ☺ |
| 55. Tourist bureau | | ☹ | | ☹ | ☹ | ☹ | ☹ | 5 ☹ |
| 56. Tourist sites' adaptability to elements | | | | ☹ | | | ☹ | 2 ☹ |

| | | | | | | | | |
|-------------------------------------|---|---|---|---|---|---|---|-----|
| 57. Travel agencies | | | | ☹ | | | ☹ | 2 ☹ |
| 58. Traffic culture | ☹ | ☹ | ☹ | ☹ | ☹ | | ☹ | 6 ☹ |
| 59. Wandering dogs | ☹ | ☹ | ☹ | ☹ | ☹ | | ☹ | 6 ☹ |
| 60. Water quality | ☹ | | | | ☹ | | | 2 ☹ |
| 61. Wheelchair/ pushchair access | 😊 | | | | | | | 1 😊 |
| 62. Wildlife | | | | | 😊 | 😊 | | 2 😊 |

| Factor | Preschool Families | Traditional Families | Teenagers | Money Rich Time Poor ⁴⁵ | Close to Nature ⁴⁶ | Adventurers ⁴⁷ | Sheer Indulgence |
|--------|-----------------------|-------------------------|--------------|---------------------------------------|----------------------------------|---------------------------|---------------------|
| Result | 8 😊 9 ☹ | 10 😊 19 ☹ | 12 😊 15 ☹ | 8 😊 15 ☹ | 7 😊 14 ☹ | 6 😊 7 ☹ | 9 😊 22 ☹ |

44 This customer group is concerned with and motivated by the natural environment and associated 'green' issues. They would also be interested in the wildlife. Walking and cycling would be key activities including off road and safe routes. Local products, particularly organic food, farmers markets and local produce on menus would have an appeal. They would recognize that traveling without the car needs greater planning and patience but has great environmental benefits. Hence, a car-free holiday experience could be very attractive but would entail a fully integrated transport system. Id.

45 This group is slightly younger although it increasingly includes Empty Nesters and is an all year round market. This group is seeking to challenge itself in both familiar activities and new experiences, such as extreme sports, mountain biking, horse riding and paragliding. Accordingly, safety and good instruction are paramount too. There are already examples of outdoor activities being used for the corporate incentive and team building markets. Id., p. 23.

46 An increasing number of people want and are prepared to pay for, an extra special experience. Celebration is probably the main driver where fine dining, pampering, personal service and treats are key elements. Anniversaries, weddings and honeymoons demand that kind of attention. Health and beauty treatments - aromatherapy, Indian Head Massage or facial – combined with saunas, steam rooms and Jacuzzis are popular. High quality local produce and top class service will be key to the eating out experience. Scenic locations or quiet countryside are preferred but standard of facilities could be more important. High quality arts – galleries, arts centers, shops – and high quality heritage attractions will be an important part of the mix. Id.

Explanation of the tourist groups:

1. Families with Preschool children

A holiday with babies and children under 5 can be very stressful and there is an increasing reluctance to go abroad because of safety issues of travel, food and health-care. Some preschool children also holiday with grandparents - this can be to give the parents or single parent a break and is often out of the peak season. To target this market the customer needs to be reassured that it can be safe, hassle free and there are specific facilities or services for that age group such as cots, baby-chairs, buggies, especially adapted bicycles and properly accredited crèches and babysitting. There will also be an increasing consciousness of healthy eating so imaginative menus and enforcement of no-smoking areas will be important. The availability of free play facilities generally or within paid attractions or other tourist facilities such as pubs and accommodation will be crucial. Imaginative toddlers pools, availability of armbands and special sessions for younger children need to be considered in leisure complexes. Water quality and cleanliness are essential. The availability of high quality baby changing facilities within public toilets, eating out establishments and attractions is also key.

Interested in:

- Safe, hassle free environment
- Cots, babychairs, buggies, adapted bicycles
- Accredited crèches and babysitting
- Imaginative menus
- No-smoking areas
- Play facilities
- Water quality
- Cleanliness
- Baby changing facilities

2. Traditional families

Holidays with children aged five to twelve have different challenges from those with younger children and are primarily based around the school holiday periods. The sport objects and mountains will continue to be the major attractions over the school breaks, especially during the summer time. Children are more independent at this age and so the ability for informal games and sports, children's clubs and opportunities for discovery will be important. Parents can also get involved on a more equal basis with the older children in outdoor activities such as cycling, water sports and horse riding.

Interested in:

- Sport objects
- Mountains
- Cleanness
- Activity providers
- Informal games and sports
- Children's Clubs
- Opportunities for discovery
- Cycling
- Water sports
- Horse riding

3. Teenagers

Teenagers are strongly influenced by their peer groups and fashion. They also need to develop their independence and try new activities. Parents may also want their own time safe in the knowledge that their children are being looked after. Outdoor activities and arts are two potential areas that could be seen as 'cool' to teenage children. Outdoor activity centers, music festivals and provision of social facilities for young people within accommodation and attractions may be key.

Interested in:

- Outdoor activities
- Arts
- Music festivals
- Nightlife

4. Money Rich Time Poor

Despite predictions to the contrary ten years ago, there is now an increasing number of people working longer hours. Stress is also the most common cause for taking time off work. Although these people are not tied to the needs of children, they are restricted by their employment. This means they can take breaks whenever they like but they will be in frequent short bursts. They tend to be very loyal once they have found what they want. They also work hard but need to wind down and recharge their batteries. The concept of going to a 'retreat' has considerable power for this group. It could involve simply doing nothing for a few days or it could be doing an activity such as walking or cycling. Pursuits that aid mental well-being such as learning to do something or discovering new things will be popular for this customer group. Alternative therapies such as Reiki, Shiatsu, Reflexology, Meditation and Yoga are increasingly fashionable. The Rock Festival in its current format has a strong appeal to this group. Rural areas and heritage and garden attractions are important here together with art galleries, museums and rural crafts. Quality of accommodation, eating out and general environment is crucial. They may prefer to travel without their car if the journey is quick and well organized.

Interested in:

- Walking or cycling
- Learning to do something
- Discovering new things
- Alternative therapies
- Festival
- Rural areas
- Heritage and garden attractions
- Art galleries
- Museums
- Rural crafts
- Quality of accommodation
- Eating out
- General environment
- Travel without their car

5. Close to nature

This customer group is concerned with and motivated by the natural environment and associated 'green' issues. They would also be interested in the wildlife. Walking and cycling would be key activities including off road and safe routes. Local products, particularly organic food, farmers markets and local produce on menus would have an appeal. They would recognize that traveling without the car needs greater planning and patience but has great environmental benefits. Hence, a car-free holiday experience could be very attractive but would entail a fully integrated transport system.

Interested in:

- Environment
- Wildlife
- Walking and cycling
- Organic food
- Farmers' markets

6. Adventurers

This group is slightly younger although it increasingly includes Empty Nesters and is an all year round market. This group is seeking to challenge itself in both familiar activities and new experiences, such as extreme sports, mountain biking, horse riding and paragliding. Accordingly, safety and good instruction are paramount too. There are already examples of outdoor activities being used for the corporate incentive and team building markets.

Interested in:

- Extreme sports
- Mountain biking, horse riding and paragliding
- Safety and good instruction

7. Sheer indulgence

An increasing number of people want and are prepared to pay for, an extra special experience. Celebration is probably the main driver where fine dining, pampering, personal service and treats are key elements. Anniversaries, weddings and honeymoons demand that kind of attention. Health and beauty treatments - aromatherapy, Indian Head Massage or facial - combined with saunas, steam rooms and Jacuzzis are popular. High quality local produce and top class service will be key to the eating out experience. Scenic locations or quiet countryside are preferred but standard of facilities could be more important. High quality arts - galleries, arts centers, shops - and high quality heritage attractions will be an important part of the mix.

Interested in:

- Fine dining
- Pampering
- Personal service
- Treats
- Health and beauty treatments
- Saunas, steam rooms and Jacuzzis
- High quality local produce
- Eating out
- Scenic locations
- Standard of facilities
- Galleries, arts centers, shops
- High quality heritage attractions

4.3 Developing Tourism in Delchevo

Strengths, Weaknesses, Opportunities and Threats (SWOT Analysis)

The CRPM undertook an analysis of the potentials of the Delchevo tourist industry investigating the potential strengths, the weaknesses, the opportunities for development and the threats to the tourist growth. Within the following table the main results of the SWOT analysis are presented.

Chart 3 - SWOT Analysis

| Strengths | Weaknesses |
|---|--|
| <ul style="list-style-type: none"> • Archeological findings • Myths and legends • Safe, hassle-free environment • Nature | <ul style="list-style-type: none"> • Cleanliness, ecological awareness • Public toilets • Traffic culture • Wandering dogs • No souvenir shops • No tourist bureau • No bus station/lines • No internet-based access to tourist information • No cable-cars/ski-lifts • Lack of skills and training in tourism |
| Opportunities | Threats |
| <ul style="list-style-type: none"> • Festivals, concerts • Folk costumes and dances • Dental care • National cuisine • Nightlife • Rustic taverns • Hiking/Mountain-biking • Travel agencies • Ethno park • Geo-thermal waters at Gabrovo • April - the month of the book • New border crossing at Crna Skala • Transit area | <ul style="list-style-type: none"> • Lack of infrastructure maintenance mechanisms • Re-emergence of trade in human beings • Obsolete asbestos water pipeline • Inadequate water capacity at the Golak mountain • Container-based waste collection system • inoperative regional dump site • Theft of steel-made public amenities • emigration • Full extinction of traditional crafts • Organic plum-tree illness |

5. Recommendations

Base the short-term tourism strategy mainly on myths and legends.⁴⁸ Delcevo abounds of them, they are appealing and convenient for presentation to various groups of tourists and what's more – they require no big investments. It is a kind of a Loch Ness-like approach.⁴⁹ All it takes for a start is to devise a good story and link it up to a certain location; and then – to promote aggressively. The rest is likely to come by itself. For this occasion, we propose further elaboration and promotion of the following myths and legends.⁵⁰

The Rock that Saves Pregnancy

Ilina was a modest shepherdess who lived a long time ago. She was extremely beautiful and enchanting. Her blinding beauty allured the sighs and glances of all the villagers...and of the tyrants. Enraptured by her gorgeousness, the tyrants decided to capture the beautiful Ilina. And so they did. Luckily, she somehow managed to flee, but unluckily – not for long. The tyrants surrounded her at the nearby meadow. Faced with the inevitable doom and not wanting to fall prey, Ilina prayed God to turn her into a stone. The God listened to her prayers. The stone is now known as Ilina's Rock. Ever since then, the rock has had an unearthly power to avert miscarriage. Many women are said to owe their motherhood to passing through the hole of this particular stone, west to eastwards, on a day other than Saturday.

The Petrified Inlaws of Kukule

Once upon a time, a wealthy man threw a wedding party for his only son. The drunken inlaws, going after the bride, came upon an old man all toggled up in worn-out and tattered clothes. The old man begged them for one's daily bread. Instead of spearing a crust, the inlaws started picking on him. What they did not realize, however, was that the old man standing before them had actually been the God himself, who – cloaked as an imploring beggar – in fact wanted to see how humane the humans were. Disgusted by their insolence, the God damned the inlaws, instantaneously turning them into stones. Ever since that day, these stones testify about the inlaws' inhumanity. And sometimes, along with the September storm, there can be heard the sigh of the inlaws, repentantly supplicating for the curse to be cast off.

47 The previous analysis of tourism inventory, customer groups and SWOT shows that Delcevo is in a short supply of the two most common triggers of tourism development: infrastructure and natural beauties. Namely, neither can Delcevo boast with built tourism infrastructure nor does it avail of some sensational natural beauties such as a sea coast or high mountains. Therefore, it cannot spark a tourism development cycle using any of the two. However, we find myths and legends a convenient substitute. Accordingly, once tourists get attracted to the mystery of local myths and legends and visit the fabled places, the demand for tourism infrastructure will naturally grow, and as soon as there is an economically-based demand for tourism infrastructure, the offer will immediately follow – leading to enhancement of tourism infrastructure.

48 Granted, there are other ways of triggering a tourism development cycle. One of them is what we call the Dubai-like approach, to take the extreme case. It presupposes an investment into tourism infrastructure as a means of sparking a tourism development cycle of a place devoid of substantial tourist attractions. This approach however, is not suitable for Delcevo due to the lack of financial potential.

49 The list is by no means exclusive. There are many other myths and legends incidental to the place but not accounted for in this study.

The Healing Powers of St. Panteleimon the All-Merciful

There is a church on the Golak mountain and there is a spring within the church. The spring heals. Should a frail person be washed with its holy waters, his/her health would be restored in due time, the story goes. However, the water must be reaped on the night between August 8th and 9th - a time when the spirit of St. Panteleimon the All-Merciful populates the church.

Raven - the Birthplace of the First Slavic Alphabet

The town of Raven used to be a center of the once-mighty duchy of Bregalnica. At its heights in the 9th century, the duchy was ruled by no one else but St. Methodius himself, the brother of St. Cyril. During their 10-year seat in Raven, the holy brothers created Glagolica - the first Slavic alphabet. "...And so they brought me to the town of Raven, carrying me over the river Bregalnica on their bare hands. I wrote them 32 letters. I taught them a little, and they converted a lot..." goes an excerpt of the Panon Legends - the Hagiography of the Holy Brothers. The tree of culture and knowledge has blossomed all over the Slavic world since those days. Its root, however, has remained in Raven. And that is what makes Raven special.

Specific recommendations for invigorating Delchevo tourism:

- Create a tourism-related web-page/portal that will present the tourism offer of Delcevo and its surroundings. Later on, upgrade the site so as to enable internet booking. Exchange banners with reputable tourism web-sites.
- Establish contacts with travel agencies from the country and abroad to include Delcevo in their offer.
- Establish a dog stationary and a service that would deal with wandering dogs. If dog shooting must persist, involve the hunting society to undertake this particular activity, since the public servants - untrained in handling with a shotgun - are not very efficient, and moreover - may inflict harm to the environment. The ammunition may fall on the hunting society which may in return get certain privileges from the public authorities, such as a quota of free hunting licenses. The public enterprise should provide transport and hole digging.
- Organize public campaign and other awareness raising activities on traffic culture and repeatedly perform them. Put the stress on the position of pedestrians and bikers in traffic, drinking and driving and importance of horizontal signalization (so that unscrupulous people do not destroy it.)
- Lay at least two billboards indicating the places of interest for tourists in combination with a tourist map. One of them should be posted centrally, while the other one should be somewhere along the M5 regional road.

- Replace the container-based waste collection system with green garbage bins. This will reduce the damage on waste collection vehicles caused by inappropriate garbage discarded in large containers and speed up the process. People are more selective in throwing away when they have green garbage bins at disposal.
- Reinvigorate talks on opening the regional dump at Karbinci. In the meantime, treat the road to the local dump Ostrec. Introduce separation of waste and work toward implementation of the National Solid Waste Treatment Strategy. Support local NGOs, such as Dozhdovnik, in their effort to clean the city and its surroundings, including the Golak mountain. Organize public campaign and other awareness raising activities on clean environment.
- Offer menus in English and/or other foreign languages. Make an attempt at introducing children's menu in the restaurants.
- Apply for funding for renewal of the children's playgrounds. Devise maintenance mechanisms, such as age limit, fees, working hours, voluntary in kind and in cash contributions.
- Think about opening a basketball/football balloon-covered playground. The findings point out that such a playground could operate economically viably over the winter season.
- Call off the "residing in Delcevo" criterion for participation in the UEFA sponsored football tournament in August and invite children from elsewhere to take part.
- Think about offering a night-time swimming at the pool. The findings point out that such an option could attract additional visitors from the nearby towns and operate economically viably over the summer break.
- The end of April is a convenient time for organizing something akin of a all-embracing Careers Fair. This fair would actually integrate several manifestations that already take place in Delcevo at that time, while introducing new and additional elements. For example, the fair could unite the Book's day (April 24th), the day of Intellectual Property Protection (April 24th), the Youth's day (April 24th) and the NGO fair (April 27-28th). The days of career and education could be some of the new dimensions introduced to this amalgamation. Young people from the eastern part of the country and the 10 000 strong students from the nearby Blagoevgrad may be interested to attend. The private universities and numerous companies from the wider Balkan region may be also interested to present themselves and recruit. The fair could be accompanied with a Music Bands Contest and/or DJ performances. Important for this kind of manifestation is to grow into a tradition, so long-term sustainability, fixed dates and locations should be premeditated too.
- Promote all local festivals, but put the emphasis on Surova (January 14th) and Pijanecko-Malesevska Svadba (September 6-8th). The former is potentially quite attractive, not only because it features a traditional and unusual carnival, but also because it overlaps with the skiing season at Bansko, meaning more potential visi-

tors. The latter has a successful counterpart in Galicka Svadba, which can be both - an asset and a drawback. The “Golacki Folklorni Sredbi” (August 8th) may be appended to the legend of the St. Panteleimon's healing powers. Promotion of more than two festivals in Delcevo could be a risky endeavor due to limited funds and low tourist potential. Such an effort would presuppose dispersion of funds, which may disturb the creation of brand-festivals. In that case, there would be many small, weak and episodic festivals instead of fewer but strong, traditional and aggressively promoted ones.⁵¹ The latter is what Delcevo needs more at the moment.

- Choose and promote a local dish/menu. Despite the availability of various local dishes, Delcevo is not widely known for any of them. Pastrmajlija (a kind of a meat pizza) is maybe closest and most expedient to being a local label, but it is not characteristic solely for this locality. Other cities in the vicinity, such as Veles and Shtip have already successfully claimed exclusivity over it. So at best, pastrmajlija may be good for a regional brand, but not for a local one. Since the temperature amplitude in Delcevo spans from a slight minus to a serious plus (in Celsius), we propose not one but two local seasonal dishes - each of them suitable for the respective weather conditions. The dishes (or the menu for that matter) may be chosen from among the following courses:

Winter season list: Much Villager's style with meat tastes, Sheep yogurt, Keg of meet in brine - Villager's style, Sauerkraut with dry peppers, Leek pie - Pijanec style, Pork/lamb entrails pie, Old homemade plumliquor, Pijanec apple, Rice pudding with sheep milk, mountain honey and walnuts, Golak hard-cheeseburger.

Summer season list: Ripestew, Pijanec shepard's salad (sheep cream cheese, sheep yellow cheese, smoked meat, tomato, cucumber, chilly peppers, boiled egg), Roast hard cheese - Vlach's style, Sausage roll - Carevo Selo, Mixed meet - Moma Altana (beef, pork, lamb, onions, garlic, paprika, forest mushrooms), Pan-cake with honey, walnuts, fig jam, blackberries, raspberries and strawberries, Homemade wine.

- Establish a tourist bureau and a souvenir shop. Granted, the study shows that such facilities cannot operate viably on their own under the present circumstances, chiefly - due to the small number of tourists. However, they may function as an attachment to other establishments that have “dealing with public” as a part of their mission. The Regional Advocacy Center (RAC) is a candidate for that. It is conveniently located in the very center, quite accessible, has extended working hours, avails of space and it deals with public. Therefore, we think that in addition to carrying on its primary mission - support to the NGO sector - RAC, with a minor training, may start acting as a tourist bureau and/or a souvenir shop. For the beginning, the souvenir shop does not have to be any different from the ones in Hotels Oaza and Izgrev in Shtip - showcases with goods produced by various NGOs specialized in handicrafts.
- Revive the border-crossing at Crna Skala. It will shorten the road to Sofia to only 100 km, which may mean more visitors.

50 Most of local festivals are unable to maintain continuity, fixed dates and locations which proves detrimental for their sustained success.

- The concept of rustic taverns may prove viable, especially if it combines the traditional cuisine with organically produced food.
- Displace the public toilet from the city center. Although it is undoubtedly a useful public amenity when functioning properly, it is not very clear whether the municipality of Delchevo has all the preconditions at the moment to be able to provide for the public toilet's proper functioning. If not, refurbish the amenity and introduce charges for its use and additional mechanisms for its maintenance and try to keep up that regime irrespective of its economic (un)feasibility.
- Open a city bus station. Having a predetermined point of departure seems to be a legal requisite for instituting inter-city bus lines. Without a city bus station, Delchevo will remain unsupplied with regular and well-organized bus transport, which may be an obstacle to tourism development.
- Organize a local public transport system (other than taxi) under licensing. It could be a profitable endeavor, since there are about 1500 working people and pupils traveling to Delchevo and back from its vicinity on a daily basis. For the time being, they are using the services of private and inexpensive, but unregulated - and thus unreliable and unaccountable transporters. The local authorities ought to introduce a licensing system, prescribing the conditions under which a private transporter can operate and then allot the public service to the highest bidders.
- Put a premium on mountain biking when considering which outdoor activities to support and develop. The findings show that Golak mountain offers convenient terrain for that. Mountain biking requires no big investments and it is hardly developed elsewhere in the country, so competition is rather weak at the moment.
- Regularly assess levels of real visitor expenditure through visitor surveys.

The local tourist workers ought to take into consideration that tourism of the future is likely to feature (1) increased numbers of older travelers - who will be healthier and richer; (2) increased interest in holidays that promote good health and well-being; (3) more holidays in which arts, culture and history play a prominent role, (4) continued increase in the use of the internet for searching and booking, (5) more demand for destinations with high environmental excellence, (6) a continuing trend for shorter holidays because of time pressures; (7) combining holidays with hobbies, interests and learning experiences; (8) increasingly discerning customers who expect and demand quality and value.⁵²

51 Supra fn. x, p.11.

5.1 Additional recommendations for the study "Developing the hidden opportunities", based on the commentaries and suggestions at the Tourist forum in Delchevo:

- The development of the rural tourism is long term process that needs gradual but comprehensive approach. Having in mind that Delchevo municipality has potential for development of the rural tourism but at the moment that is at zero point, the first step should be made with a pilot project of one village where the first input "invested" will be based on some successful examples such as Brajchino (initial contacts of exchange of experience between Delchevo and Brajchino are established). Furthermore raising the awareness of the local population will be essential for the success of this initiative.
- Delchevo is known for its organic production, which is area that is developing and in which many efforts are invested. However there is still room for improvement regarding the promotion of the organic production as one of the main features of Delchevo. Developing the organic production will be important investment in this region as eco tourist destination.
- Pijanec, the region where Delchevo belongs, has rich folklore tradition of great importance for the national representation of the whole country. The folklore dance "Kopachka" that most authentically is performed by the local folklore association needs to be branded. Moreover the people that perform this folk dance are old and some day should be replaced by younger people. In this regard it is more than necessary that some initiatives are raised so this tradition is passed to the new generations who will continue to perform this folk dance in its most authentic way.
- The folklore customs are important issue that has not got the necessary treatment and attention. There is almost nothing published for the rich tradition of this region although some of the local people have dedicated their professional life in collecting and research of the folklore and traditional customs that might be attractive for the potential tourist offer of Delchevo. Dimitar Uzunski, the local population say is "live book" and has great written but unfortunately not published collection of the traditions and customs characteristic for this region.
- In the Pijanec region there are many churches some of them of invaluable significance such as the church in Selnik. Furthermore the religious holidays specific for each church and the characteristic customs and tradition regarding their celebration could became part of some potential tourist offer.
- Delchevo does not have a museum, but on the other hand has significant archeological and paleontological locality and findings that due to the lack of appropriate venue are exposed in the museums of other cities (ex. Shtip). The idea of opening a museum in Delchevo should be seriously considered since great potential of the region exists for that.

- In the context of the previous recommendation, there should be greater investments in the archeological and paleontological localities, by fostering and improving the research and scientific work there, which eventually will have overall positive impact since that is an important tourist resource.
- Pijanec, once known for its traditional crafts, now is in unenviable situation, since the handicraft in this region is dieing off. Having in mind the importance of this sector not only for the local economy, but also for the tourist development of Delchevo concrete steps should be taken for the protection, development and promotion of the old traditional crafts in Delcevo (some examples are the manufacture of bagpipe in Zvegor, small drums, the manufacture of folklore costumes etc.)
- Golak in the 90-ties was a favorite destination for many people especially children who enjoyed in the nature and ecological environment. Unfortunately the “golden age” of Golak in over. Initiatives should be taken, so many of the potentials of the mountain to be used. The ecological environment, the rich flora, the great potential for mountain cycling, extreme sports etc. are some of the potential offer that could be developed and presented not just before the domestic but also before the foreign tourists.
- For better representation and promotion of Delchevo a mascot of the municipality should be created. It should represent the main and most important features of the region.

5.2 A Proposal for a Delchevo Tourist Route



Visiting the following tourist attractions:

Day 1

1. ILIN KAMEN (The Rock that Saves Pregnancy)

Near the village of Zvegor is located the rock that, is believed, has healing powers, better known as the “Ilin kamen”. Besides the interesting but sad story about the beautiful shepherdess Ilina, who God had turned into a stone to avoid being capture by the tyrants, this place is also known for its beautiful untouched nature. Through the years this place has attracted many people, mostly women trying to avert miscarriage, but also many people who were astonished by the beautiful nature.

Taxi price for one way drive to Zvegor: 70 den.

2. The Church St. Panteleimon (The Healing Powers of St. Panteleimon the All-Merciful)

To the church St. Panteleimon one can get by car, following the way to Golak Mountain. The church is built in 1913, on the foundations of the church St. Petka destroyed during the Ottoman Empire. It is believed that the springs within the church are holy and have healing power. The night between August 8-th and 9-th is great holiday that worships the saint Panteleimon, when many people come to enjoy the rich cultural and music program and to be washed with the holy water. Despite that, the landscape of the Golak Mountain is beautiful and many people enjoy and relax in the enchanting nature.

Taxi price for round trip to Golak: 250den.

Day 2

3. KUKULJE (The Petrified Inlaws of Kukule)

Near the village of Istvenik in a very hard accessible region is located the “Kukulje”. It is not approachable by car and one must leave the car in the village of Istvenik and get to the Kukuljeto on foot. It is an impressive monument of the nature, according the legend the big stones are drunken inlaws going after the bride, who on the way had met God cloaked as a beggar. Because of their humiliating and inhuman attitude, God has punished them by turning them into a stone.

Taxi price for round trip to Istvenik: 250den.

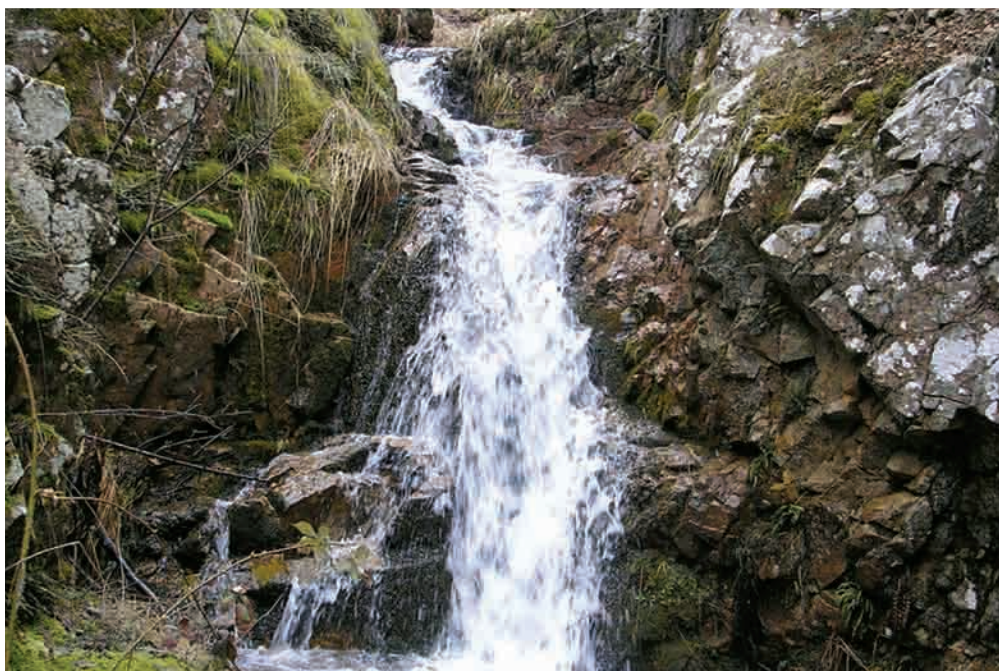
4. Raven (the Birthplace of the First Slavic Alphabet)

Near the village of Razlovci, some of the local people believe was located the hermit cell of St. Kiril, where he had translated the church books from Greek to Slavic. According some there was located the town of Raven the cradle of the Slavic alphabet, which was ruled by the brother of Kiril, Methodius.

Taxi price for round trip to Razlovci: 400den.

ФОТОГРАФИИ ОД ДЕЛЧЕВО

Кукуље: Нов Иственик
Kukulje locality: Nov Istevnik



Илин камен - каменот на плодноста
Ilin Kamen - the rock that saves pregnancy



Кукуље - легенда за скаменетите свадбари
Kukulje - a legend about the petrified wedding guests



Локалитет Градиште, с. Град
Gradishte locality, Grad village



Играорно друштво „Копачката“
„Kopachkata“ Cultural ansamble



Рачно изработени инструменти од старите пијанечки занаетчи
Hand-crafted national instruments made by the old masters from Pijanec region

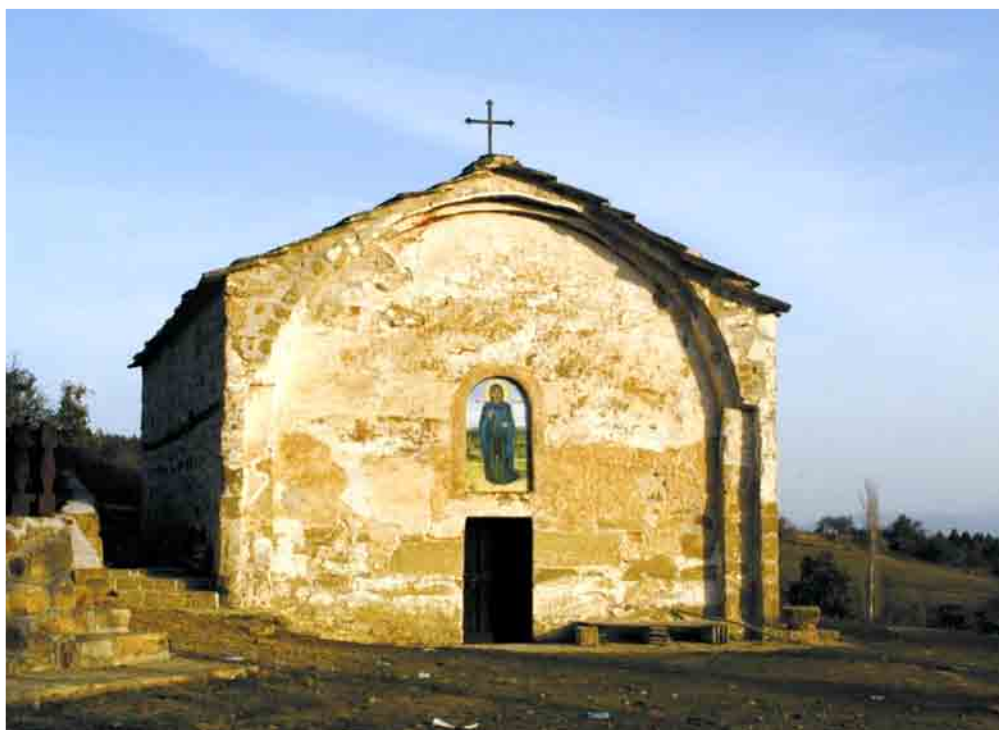


Пијанечко - Малешевска свадба

Wedding ceremony in the Pijanec and Malesevo region



Св.Петка, село Селник, споменик на културата
St.Petka cultural monument, Selnik village



Св.Архангел Михаил, с. Драмче
St.Archangel Michel, Dramche village



Остатоци од праисториско животно - мастадон, с.Стамер
Remains from a mastadon, Stamer village



Череп од жирафа, с.Стамер
Giraffe's cranium, Stamer village

